

## 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 July 15, 2020**.

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

### APPLICANT INFORMATION

Proposal Title:	Uno- Madison		
Amount of Funds Requested:	<u>\$1,430,000</u>	Type of Project:	<input checked="" type="checkbox"/> New Construction <input type="checkbox"/> Acquisition/Rehab
Name of Applicant:	Northpointe Deveopment		
Mailing Address:	2628 Saw Tooth Drive, Fitchburg WI 53711		
Telephone:	<u>608-334-5665</u>	Fax:	
Admin Contact:	<u>Sean O'Brien</u>	Email Address:	<u>sean@northpointedev.com</u>
Project Contact:	<u>Sean O'Brien</u>	Email Address:	<u>sean@northpointedev.com</u>
Financial Contact:	<u>Sean O'Brien</u>	Email Address:	<u>sean@northpointedev.com</u>
Website:	<u>Northpointedev.com</u>		
Legal Status:	<input checked="" type="checkbox"/> For-profit <input type="checkbox"/> Non-profit	Type of LIHTC Application:	<input checked="" type="checkbox"/> 4% <input type="checkbox"/> 9%
Anticipated WHEDA Set-Aside:	<input checked="" type="checkbox"/> General <input type="checkbox"/> Preservation <input type="checkbox"/> Non-Profit <input type="checkbox"/> Supportive Housing		
Federal EIN:	<u>85-1243046</u>	DUNS #:	<u>117563720</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: Sean O'Brien

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

Date: 07/14/2020

**PROPOSAL DESCRIPTION**

1. Please provide an overview of the proposal. Describe the impact of the proposed development on the community as well as other key characteristics.

Northpointe Development is proposing to construct a four-story 60-unit State and Federal 4% tax credit project to be located at 7601 Mineral Point road. The site is known for formally being the Pizzeria Uno's Madison West Location. The restaurant closed its doors years ago and the owners have struggled to sell the property. Over the past few years the owners have worked with a few market-rate housing providers, none of which have been able to move a redevelopment forward. One of the challenges on the site is that the building was converted into a restaurant from a farmhouse built in the 1860's and the City and Neighbors would like to see the farmhouse saved and incorporated into a redevelopment plan. Northpointe Development fully agrees that this community asset should be saved and we have the experience to successfully preserve the building. Our proposal includes saving the historic portions of the farmhouse, moving the building closer to Mineral Point road and using the building for community and recreation space for the tenants. The proposal includes 60 units of affordable housing which will be 100% affordable and will include underground and surface parking.

The proposal meets a significant number of priorities identified by the city including:

New Development in areas of the city with strong connections. Our site is very walkable to a significant amount of employment opportunities, schools, public transportation, grocery, park, etc. The site located on a major thoroughfare and is across the street from a super priority area and is just over 1000 feet away from a proposed BRT bus stop location. The site is part of the Odana Area Plan and is targeted as a future growth area which implements goals in the City's Comprehensive plan. 20% of the units will be set aside at 30% CMI and 26% of the affordable units will be three-bedrooms. The property will contain both indoor and outdoor play space and Northpointe will work with a local support service provider to house homeless and formerly homeless individuals and coordinate or provide a level of services that meet the tenant's needs. Northpointe intends to defer 56% of their developer fee and will secure a significant amount of other resources from WHEDA and the Federal Home Loan Bank. The units will not allow smoking and will provide internet at no cost to the residents.

Although the site does not score as well as it would have in previous QAP's, we believe the this location would be meet a significant number of priorities that the City has established for the affordable housing fund as described above. Under the 4% state program, financial feasibility has proven to be the main deciding factor over location points albeit location can also drive financial feasibility. The State 4% program is significantly less competitive than the 9% program as last year over 60% of 4% applications were funded whereas only about 20% of applications in the General Set-aside were funded. There were only two eligible 4% applications out of 17 submitted in 2020 that didn't receive credits. This year, WHEDA has further reduced the 9% General Set-Aside to 32% meaning likely only 3-4 proposals will be funded. As you will see in our proposal, we believe that with the City's assistance, we can deliver a project that maintains many of the same qualities of a 9% tax credit project and gives the city better odds to add affordable housing from the 2021 competitions.

As the State's 4% program is newer it doesn't fit perfectly with the City's RFP. The main example of this is city support per affordable housing unit calculation. As stated above, the 4% program has much better odds to deliver a significant number of priorities outlined by the city, but to be financially feasible the application must take advantage of the new income averaging policy. All 60 units will be affordable tax credit units and restricted to households earning 30-80% CMI. The combination of affordability must average to 60% CMI. Instead of delivering all 60 of the units at 60% CMI we are able to utilize income averaging to deliver 36 units at 50% CMI or less and 12 units at 30% CMI. Under the proposal our gap per affordable unit is calculated solely on the 36 units although the project is deemed 100% affordable. We wanted to point this out to the committee if comparing a 9% project to a 4% project on a per unit request basis. 4% projects will likely have larger gaps but if financially feasible will have a much greater opportunity to win credits vs a 9% project.

Please note that the projected score won't match the actual score as WHEDA reduced the total points possible in Supportive Housing and Workforce Housing. Northpointe intends to max the score in both categories so that is how it is represented in the document.

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

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

Total number of units: 60  
 Total number affordable of units (<60% CMI): 36 Total % affordable of units (<60% CMI): 60  
 Total amount of AHF requested per affordable unit: 39,722  
 Number of units supported by Section 8 project-based vouchers, if known: 0 PBV CMI level: \_\_\_\_\_

**AFFORDABLE HOUSING INITIATIVE FUND GOALS & OBJECTIVES**

3. Please check which of the following goals outlined in the Request for Proposals are met with this proposal:
- 1. Increase the supply of safe, quality, affordable rental housing throughout the City that ensures long-term affordability and sustainability.
  - 2. Preserve existing income- and rent-restricted rental housing to ensure long-term affordability and sustainability.
  - 3. Improve the existing rental housing stock in targeted neighborhoods through acquisition/rehab to create long-term affordability and sustainability.

**AFFORDABLE HOUSING NEEDS**

4. Describe your knowledge of and experience in identifying affordable housing needs of the City of Madison.
- Northpointe's Principals have significant experience in affordable housing policy and successfully sitting developments. Northpointe's newest principal, Sean O'Brien, spent 14 years working at WHEDA where he ran the Commercial Lending Department. He was responsible for creating and implementing the State's affordable housing policy and operating the tax credit program. In addition to Mr. O'Brien's experiences at WHEDA he has been a local resident of the city for almost 40 years, knows the history, and has kept in touch while the city has grown and changed. The City of Madison has the most proactive approach to the tax credit program of any city in the State and has been very successfully in obtaining resources, surpassing a recent 5 year goal to add 1000 units of affordable housing. I believe this is because they understand their own needs as a city and how best to leverage their resources to obtain state and federal housing resources to meet their goals.

5. Please describe the anticipated demand for the proposed target populations served in this location.
- Northpointe will order a market study for the tax credit application. However, due to the location and unit mix we believe that the project will be in high demand. All of the units will be rent restricted and affordable as the need for affordable housing in Madison is significant. 60% of the units will be affordable to very-low income and extremely low income households. 26% of the units will be 3-bedrooms for large families. 20% of units will be targeted towards households, including veterans, that are in need of supportive services. Currently there are over 400 individuals and over 100 families on the County's housing priority list.

**INTEGRATED SUPPORTIVE HOUSING UNITS**

6. 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, other, etc.).

12 units total - 6 one-bedrooms, 4 two-bedrooms, 2- three bedrooms will be set-aside for households in need of supportive services. These units will be restricted to households that qualify at 30% CMI or less. We intend to house a minimum of 6 veteran households in need of supportive services, 2-4 homeless households from the priority list, and the remainder of the 30% units being rented to formally homeless families.

7. 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.

We will work with a service coordinator and providers to assess the needs of the tenants at move-in and what referrals those tenants will need to maintain stable housing. Case management will be provided by our partner support service provider or other agencies like Joining Forces for Families. We will proactively work with management and our service coordinator with our waiting list and when a supportive unit becomes vacant to place a family in need vs waiting 30 days with the unit vacant and renting to any income eligible household.

8. 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.

Please see the supportive services plan and MOU/ Letter from our partner supportive service agency. We've partnered with Middleton Outreach Ministry to coordinate services for the target population as well as provide on-site intensive case management services if their organization has capacity. If they do not have capacity for intensive case mgmt for additional households at the time of the vacancy, property management and Middleton Outreach Ministry will coordinate with another provider for case management. Currently Middleton Outreach Ministry believes they have capacity to provide case management to 2-4 households.

9. 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.).

The property has committed to provide \$5,000 to Middleton Outreach Ministry annually for services and is working with MOM to find other avenues for support including having MOM be a 51% owner of the project. We continue to have conversation with MOM and will continue to look for other avenues to obtain financial resources for our partner.

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

Northpointe and ACC will work with the County to obtain funds as well as assist Middleton Outreach Ministry in fundraising for services.

## TENANT SELECTION, AFFIRMATIVE MARKETING & BARRIERS TO ENTRY

11. 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.

ACC Management will professionally manage the property. ACC is one of the highest regarded affordable housing management companies in the State of WI. ACC staff reviewed the Tenant Selection Plan Best Practices and believe that the Best Practices as well represented in their Tenant Selection Plan. The resident selection criteria builds in opportunities to overcome obstacles. For example, student debt and medical debt are not considered when looking at credit. Various options are available for applicants to help overcome poor credit and other obstacles. Examples include: Obtaining a co-signer, providing a security deposit of 1.5 times the monthly rent (rather than the standard 1 month rent), having the monthly rent paid by a sponsor, and proof of ability to pay based on two years history of paying a comparable rent amount.

12. Describe the planned approach, relationship and coordination between the Property Manager and the lead Supportive Service Coordination Agency for lease up and ongoing services. How will these entities work together to ensure a successful development in the context of the greater neighborhood and community?

The Supportive Service Coordination Agency will be contacted to identify referrals for the 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 that qualifies based on the supportive housing standards.

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

The minimum standard for housing is 1 person per bedroom. The lease and addendums give management the option to transition an over-housed household to a smaller apartment at the end of their lease term.

14. 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), especially for Asian and Latinx populations which tend to be under-represented in AHF Completion Reports.

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

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

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

ACC will:

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

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

15. 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.

See response above to question #14

16. Describe the proposed development’s security deposit policy (e.g., ½ or 1x’s rent, other set amount(s), criteria for variations if credit is conditional, etc.). What is the policy for units with a guaranteed rent subsidy or voucher?

The security deposit is equal to one month rent. The amount will vary for unit sizes based on the specific income set aside that the unit is in. For example, a 2-bedroom 30% CMI unit will have a lower security deposit than a 2-bedroom 60% CMI unit. If credit is conditional, other options are available to the applicant to overcome this barrier, such as obtaining a co-signer, providing a security deposit of 1.5 times the monthly rent (rather than the standard 1 month rent), having the monthly rent paid by a sponsor, and proof of ability to pay based on two years history of paying a comparable rent amount. For applicants that have a Housing Choice Voucher or are applying to occupy an apartment with rent subsidy, the minimum income requirement (typically 2x monthly rent) is waived.

17. Describe the proposed development’s policy on limiting rent increases for lease renewals? How will prospective long-term tenants be protected from significantly and rapidly rising contract rents allowed by WHEDA?

Each year during the budgeting process for the upcoming year, the current rents, current and projected expenses, and income and rent limits are analyzed to determine what rent increase (if any) is needed for the development. Through this process, rent increases are generally limited to 2% - 3% depending on the market. It is important for the development to have sufficient funds to operate while balancing affordability and working to minimize apartment turnover. ACC's hands on proactive approach keeps the property up to date with the current renting environment without pushing rapid increases onto tenants. Although WHEDA doesn't have a policy restricting rents, rapid increases are significantly frowned upon by WHEDA and could put ACC's Management Certification in jeopardy.

## PUBLIC PURPOSE AND RISK

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

The proposal adds significant value to the City and community. The site has sat vacant for years which is an extreme underutilization for a site located on a major thoroughfare in the City of Madison. The proposal will preserve the Historic Farmhouse and incorporate the building into a redevelopment that adds tax base and quality affordable housing. The risks associated with project include being the first housing development introduced into a predominately commercial area, successfully incorporating the Farmhouse into the development, obtaining the resources necessary to complete the development: soft funds and competitive tax credits. Northpointe has never returned credits to WHEDA, if awarded the project will move forward pending necessary City approvals.

## SITE INFORMATION

19. Address of Proposed Site: 7601 Mineral Point Road, Madison WI

20. 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 Area (New Construction Only)  
 Super-Preferred Area (New Construction Only)  
 Eligible Area (New Construction & Acquisition/Rehabilitation)  
 Targeted Rehab Area (Ineligible for New Construction, but preferred for acquisition & rehabilitation)

21. Identify the neighborhood in which the site is located: N/A the site is not located in an established neighborhood

22. Date Site Control Secured: 7/1/2020

23. 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 using the AHF Targeted Area Map to show the site in the context of the City.)

This site recently came back onto the market after a market rate housing developer failed to develop the project. One of the challenges with the site is incorporating the existing Historic Farmhouse into the development. Northpointe has extensive experience in Historic Preservation and Adaptive Reuse and believe that we are the right company to redevelop the site. The other reason we choose the site was the location of the site and proximity to amenities, transit, jobs, services, and schools which is key when combining quality affordable housing to the other social determinants of health. As a long-time resident of the Madison Area I've noticed that the West side has a extreme shortage in affordable housing and has recently received significantly less state and federal resources than other sections of the City. This site is extremely walkable and is located along a major thoroughfare in one of the largest job centers in the city outside of downtown and the UW Madison Campus. The site is mostly surrounded by commercial office and retail space and is located at the corner of Mineral Point Road and D'Onofrio Drive. The site has easy access to the Beltline.

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

The Ganser Farmhouse, built in 1863 currently sits on the site and was most recently used as Pizzeria Uno's Bar and Restaurant. The business stopped operating years ago and the site has sat vacant. Over the course of time, renovations and additions have been added to the Farmhouse. Northpointe plans to preserve the historic portion of the Farmhouse and relocate the building towards Mineral Point Road to allow the rest of the site to be redeveloped. The non-historic portion of the building will be demolished and the Farmhouse will be incorporated into the development as community space, indoor play area for the tenants, property and supportive service provider offices, etc.

25. 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	Metcalf's West Town	.15
Public Elementary School	John Muir Elementary	1
Public Middle School	Thomas Jefferson	.75
Public High School	Memorial	.6
Job-Training Facility, Community College, or Continuing Education Programs	Upper Iowa	.2
Childcare	The Well- Preschool and Childcare	.25
Public Library	Alicia Ashman Branch	1
Neighborhood or Community Center	Lussier Community Center	.75
Full Service Medical Clinic or Hospital	Uw Health Urgent Care	.5
Pharmacy	Walgreens	.25
Public Park or Hiking/Biking Trail	Haen Family Park	.25
Banking	Home Savings	.1
Retail	High Point Shopping Center	.1
Other (list the amenities):	West Town Mall	.2

26. What is the actual walking 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.

The nearest seven-day per week transit stop is 150 feet from the proposed site. According to the schedule on Madison metro, the 67 route has a bus running every 10-15 minutes. The specific stop schedules are not listed on the Website at this time which may be due to covid. The closest bus stop is at Mineral Point and Randolph although residents will have to cross Mineral Point road to get to this stop. Safer stops are located 200 and 400 feet from the site at Ganser and D'onofrio and Ganser and Mineral Point road respectively. The site will also be 1,300 feet from the BRT line stop at Mineral and South Westfield. Route 14 also serves this site on a weekly basis but is currently not operating a schedule due to Covid-19.

27. Describe the walking and transit routes for children to get to their elementary and middle schools.

The elementary and middle school are both less than 10 minute walks down Mineral Point Road. Mineral Point Road has many controlled intersections, sidewalks, and good visibility which would allow children to walk quickly to school. However, a lesser traffic route would be crossing Mineral Point Road at the corner of the property onto Randolph Drive and turning on Tree Lane which would be a direct path to school.

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

The site is walkable with many of the amenities listed above being less than .25 miles from the site. The site has 3 bus stops less than 400 feet from the site and will be located less than .25 miles from the new BRT line. There are many food options including Metcalfs, Walgreens, Pick n Save, and restaurants near the site. After school activities are within walking distance. The nearest library public library is 1 mile from the site but residents will also have access to school libraries as well as Barnes and Noble book store which is .2 miles from the site. The property will offer parking and there will be ample parking on-site as well as street parking for residents. There are thousands of jobs located near the site with major employers recently coming into the area including Exact Sciences and Nexus. Communities like Verona and Middleton have significant job centers and are both a 5-10 minute drive from the site.

29. Describe the impact this housing development will have on the schools in this area. What percent are the current enrollment and 5-year projected capacities for the area schools? Ideal enrollment is considered 90%. Are the schools projected to be at, above, or below capacity? Approximately how many elementary and middle school children are projected to live at the proposed housing development based on 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 [kachavira@madison.k12.wi.us](mailto:kachavira@madison.k12.wi.us). Existing school capacity information can also be found at: [https://accountability.madison.k12.wi.us/files/accountability/uploads/2019-11\\_fall\\_enrollment\\_reports.pdf](https://accountability.madison.k12.wi.us/files/accountability/uploads/2019-11_fall_enrollment_reports.pdf)

The report shows that in general, the number of children attending Madison schools is expected to decline over the next 5 years. The site is located nearest to the Muir Elementary School which is at 82% capacity and Jefferson Middleschool which is at 78% capacity. The schools are projected to be at 86% and 77% respectively in 5 years. We would expect between 30-40 elementary and middle school children to live at the site given the unit mix.

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

The site was most recently used as a restaurant. The original building was built in the 1800s and recent additions have been made to the building over time. No other uses are known by Northpointe that would cause environmental concern. A Phase I has not been completed at this time.

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

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

Amending the Zoning Map and rezoning to a PUD must be approved.

33. 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 linked [here](#).

The Future planned use is Community Mixed Use of which multifamily fits into that use. The site is located in a growth area and is a part of the Odana Plan. The project meets the Plan's goal to deliver affordable housing throughout the city as a majority of the affordable has gone into other areas of the city recently.

## CITY AND COMMUNITY ENGAGEMENT PROCESSES

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

Northpointe held a pre-application meeting with staff on June 23, 2020. Feedback was generally positive. Staff was willing to assist us with going through the rezoning process under a tight but doable timeline. Staff indicated that our proposal would have more support if we incorporated the Historic Farmhouse into our development plans. There was a little concern with an affordable housing development being the first housing development in an area with few other multifamily properties.

35. Have you presented to the City's Development Assistance Team (DAT)? If so, please summarize the staff comments to your proposal and reference the date of the presentation. If not, what is the anticipated date of the DAT presentation?

We are scheduled to present our plan at the July 16<sup>th</sup>, 2020 meeting.

36. 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?

Northpointe spoke with the local alderperson on July 1, 2020 prior to having a site plan. We discussed the general proposed use of the site and the alder was very interested in seeing the site plan. The plan was sent to the alder on 7/11 and we haven't had a chance to connect since that time. The alder is supportive of all types of housing and would be more supportive if the plan included preserving the Farmhouse.

37. Describe the neighborhood and community 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?

When speaking with the Alder, they suggested that we coordinate input through them and they would help get neighboring business owners and others to come to a meeting and provide feedback. The site is not located in an area of Madison with a Neighborhood Association or relatively close to any. According to the Alder the site is at a large enough distance that there wouldn't be much interest from any association to provide feedback on the proposal. This plan was confirmed as the best approach with Community Development Staff

38. Amid the environment created by the COVID-19 pandemic, how will you engage and communicate with residents and stakeholders differently than in years past?

All meetings will be held viturally and we will ask the City Staff and Alder for reccomendations as to best ways to notify neighbors of our plans. We plan to have the first Neighborhood Info meeting around August 5 if not before.

39. Describe your plans for supplemental neighborhood meetings and other ways of engaging residents. How will residents be engaged or given the opportunity to participate in the design process (e.g., steering committee, charrette, survey, presentations, website, etc.)?

We will continue to work with the Alder and City Staff on their reccomendations for supplemental meetings given that the site isn't located in an established Neighborhood.

40. Describe how this development will promote social equity in the community and the greater Madison area. How will the proposal embrace the City's [Racial Equity and Social Justice Initiative](#)?

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

## SITE AMENITIES

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

The project will include surface parking, tot lot or play structure, patio with tables and chairs and a grill area. There will also be some greenspace and likley some outdoor garden area. Given the topography of the site, the building will have some breathtaking views of the west side of Madison to the Capitol building.

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

The Farmhouse will include a community room, business center, leasing office, service coordnator office, and year-round indoor play space. The apartment building will have a fitness room, secured entry, intercom, security cameras, parcel rooms and individual storage (no charge to tenants). Surfarce parking and underground parking will both be available to the tenants. There will be no cost for the surface parking. All residents will be charged \$55/ month for the secured garage parking.

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

Internet will be provided to the tenants at no charge and the entire building will be non-smoking. The proposed unit amenities include kitchen appliances (refrigerator, range/oven, dishwasher, disposal, microwave), in-unit washer/dryer, patios/balconies, central air-conditioning, window treatments, and cable TV/computer internet hookups.

**PROPOSAL TIMELINE**

44. 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]	7/10/20
1 <sup>st</sup> Development Assistance Team Meeting (Due by 8/6/20) [Target/Actual Month/Date]	7/16/20
1 <sup>st</sup> Neighborhood Meeting (Due by 8/19/20) [Target Month/Date]	08/05/20
Submission of Land Use Application (Zoning Map Amendments Due by 9/16/20)	08/16/20
Submission of Land Use Application (Permissively Zoned Due by 10/7/20)	N/A
Plan Commission Consideration (If Rezoning, Due by 11/20/20 or 12/1/20 Common Council)	10/20
Urban Design Commission Consideration, if applicable [Target Month/Date]	10/20
Application to WHEDA	12/20
Complete Equity & Debt Financing	11/20
Acquisition/Real Estate Closing	12/20
Rehab or New Construction Bid Publishing	10/20
New Construction/Rehab Start	12/20
Begin Lease-Up/Marketing	9/22
New Construction/Rehab Completion	5/22
Certificate(s) of Occupancy Obtained	5/22
Complete Lease-Up	7/22
Request Final AHF Draw	7/22

**HOUSING INFORMATION & UNIT MIX**

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

ADDRESS #1:		# of Bedrooms					Projected Monthly Unit Rents, Including Utilities				
% of County Median Income (CMI)	Total # of units	# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs	\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
≤30%	12	0	6	4	2	0		563	675	781	
40%	0	0	0	0	0	0					
50%	24	0	9	7	8	0		928	1122	1295	
60%	0	0	0	0	0	0					
<b>LIHTC Sub-total</b>	<b>36</b>	<b>0</b>	<b>15</b>	<b>11</b>	<b>10</b>	<b>0</b>					
<b>Market*</b>	24	0	8	10	6	0		1151	1444	1823	
<b>Total Units</b>	<b>60</b>	<b>0</b>	<b>23</b>	<b>21</b>	<b>16</b>	<b>0</b>	Notes: All Market Rate units will be 80% CMI using income averaging in an 100% Rent Restricted LIHTC property				

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

ADDRESS #2:		# of Bedrooms					Projected Monthly Unit Rents, Including Utilities				
% of County Median Income (CMI)	Total # of units	# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs	\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
≤30%	0	0	0	0	0	0					
40%	0	0	0	0	0	0					
50%	0	0	0	0	0	0					
60%	0	0	0	0	0	0					
<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>	0	0	0	0	0	0					
<b>Total Units</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	Notes:				

\*40% = 31-40% CMI; 50% = 41-50% CMI; 60% = 51-60% CMI; 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 the LIHTC application to WHEDA presents 8 PBV units as 50% CMI or 60% CMI units, please include those on the “50%” or “60%” row in the above table(s)). The City of Madison will enforce this income designation in the AHF Loan Agreement, if this proposal is awarded funds. Include a comment in the Notes, e.g., Eight (8) 50% CMI units will have PBVs.**

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

## ENERGY EFFICIENCY, RENEWABLE ENERGY & SUSTAINABLE DESIGN

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

All of the Northpointe developments have either met with Focus on Energy during the design phase to incorporate the latest energy efficiency products or achieved a minimum 150 third-party certified score within the Wisconsin Green Built Home program. We strive to incorporate all current energy efficient products and green building designs into our buildings. Northpointe also excels in historic preservation and adaptive reuse winning a number of top project, historic preservation, and excellence awards.

48. Please describe how this proposed development 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](#).

We intend to install a PV Solar System sized at approximately 60KW that will generate approximately 75,000 KW/year which may handle 90% of the common area load.

49. Please describe the proposed project's energy efficiency goals. Please attach a copy of the confirmation page demonstrating that your organization has submitted an [Initial Application](#) for Focus on Energy's Energy Design Assistance program. Identify any third party certification, such as LEED®, WELL, Passive House or similar, that will be sought.

We will work with Focus on Energy for this project and will also follow the requirements for Green Built Homes by scoring a minimum of 200 points with that program. 200 points would be a 33% increase over the previous requirements by WHEDA. Our Architect, Knothe Bruce, does incorporate sustainability features in most of their projects and specifically for the WHEDA projects we follow the Green Built Homes scoring criteria. Knothe Bruce has staff that are LEED Certified as well and can help to ensure we meet the LEED criteria, if that is asked for or needed.

50. How will this project contribute to creating a walkable, human-scaled community inside and outside the property lines?

The building and the site will be designed to illicit the best human response from our tenants. Not only are we providing a high quality affordable home but also one that is connected to the neighborhood and opportunities nearby. The site has some unique topography for a main thoroughfare but we intend to make sure that the units are connected and easily accessible to the neighboring streets. Ample bike parking and new green space and trees will be added to the site. The goal will be to create a neighborhood feel at the property itself.

51. Describe how the local south-Central Wisconsin climate will inform the design of the proposed development and the challenges it will present.

Northpointe has developed over 1,000 units in Wisconsin and we are working with an Architect and Engineering firm that have done a significant amount of work in the Madison Area. The building will be designed for the change in the seasons with a Building envelope that exceeds code.

52. Describe this development's proposed strategies to reduce reliance on municipal water sources (i.e. water efficiency). Will the development incorporate systems to recapture and/or reuse water generated on-site?

Water saving faucets, showerheads, and high quality low-flush toilets will be installed. Property management will educate tenants on water saving practices. Given the size and location of the site, Northpointe will have to get further into the design of the site and work closely with our architect and engineer to determine if other design strategies can be incorporated.

53. What building design and HVAC considerations will your team include to enhance community resiliency for building inhabitants in the face of a potential future pandemic?

The HVAC installed will be a split system allowing for each unit to have their own heat/air conditioning. We are looking into UV light in supply ducts or UV filtration costs and incorporating into our design.

54. Describe this development’s approach to accessibility, including the number and percent of accessible units proposed for each of level of accessibility. Will this development meet or exceed the minimum requirements? For rehab, describe the accessibility modifications that will be incorporated into the existing development.

The project will be 100% visitable, only 50% is required by the 4% tax credit program. 20% of the units will be equipped with univeral design features with the remained of the units having the capacity to add accessibility features if a tenant requests a reasonable accomidation.

55. 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- there are no existing multifamily units located at the site.

**REAL ESTATE PROJECT DATA SUMMARY**

56. 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:	7601 Mineral Point Road, Madison WI								
	0	60	0	0	0	60	1,355,000	4,771,000	1,100,000
Address:	Enter Address 2								
Address:	Enter Address 3								

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

The Ganser Farmhouse, built in 1863 currently sits on the site and was most recently used as Pizzeria Uno's Bar and Restaurant. The business stopped operating years ago and the site has sat vacant. Over the course of time, renovations and additions have been added to the Farmhouse. Northpointe plans to preserve the historic portion of the Farmhouse and relocate the building towards Mineral Point Road to allow the rest of the site to be redevelopment. The non-historic portion of the building will be demolished and the Farmhouse will be incorporated into the development as community space, indoor play area for the tenants, property and supportive service provider offices, etc.

58. 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.

None the site has been vacant for years.

**DEVELOPMENT TEAM**

59. 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.

Ownership chart attached. The project owner will be Uno-Madison, LLC and will have a standard tax credit ownership structure in that the project will be 99.99% owned by the tax credit investor (TBD) and .01% owned by the managing member. The managing member has not be established yet but Northpointe Development will likley own 25% of the managing member but have control over the decisions and operations of the project. A non-profit will likley own 51% of the managing member and we are in talks with the Middleton Outreach Ministry to be our non-profit owner. Finally we will work with an emerging developer who will own .24% of the managing member. That developer will co-develop the property with Northpointe in an attempt to build that co-developer's experience and capacity. We are in preliminary discusses with a likely co-developer and are confident that the partnership will be established prior to submitting an application to WHEDA in December. This ownership structure is a win-win for Northpointe Development and our partners. The project will have an increased opportunity to obtain tax credits from WHEDA and AHP from the FHLB while our partnrs will have an opportunity to gain expereince and capacity in the tax credit program.

60. 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. If not, please elaborate on how the non-profit organization will be involved in the long-term ownership of the development.

The project will not be co-developed with a non-profit partner. The property will be co-developed with a new emerging developer to build capacity and experince of co-developer.

61. 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
Kevin Burow	Knothe & Bruce	Architect	kburow@knothebruce.com	608-836-3690
Mark DeAmicis	Krupp Construction	General Contrator	mark@kruppconstruction.com	608-260-7005
Joe Shumow	Reinhart	Attorney	jshumow@reinhartlaw.com	608-229-2245
Ellen Carlson	Middleton Outreach Ministry	Service Provider	ellen@momhelps.org	608-836-7338
Chris Hand	ACC Management	Property Manager	chris@accmanagmentgroup.com	920-966-9905
David Glusick	Viebicher	Engineer	dglu@vierbicher.com	608-831-3970

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

Company	Role in Development	# or % Employees who are Women	# or % Employees who are Persons of Color
Northpointe Development	Developer	N/A no employees	N/A no employees
Krupp Construction	General Contractor	13.9%	8.3%
ACC Management	Property Manager	48%	17%
Knothe Bruce	Architect	40%	5%
Middleton Outreach Ministry	Service Provider	91%	18%

**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**

63. 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>
Maria Prioletta	Milwaukee Department of Community Development	mprioletta@milwaukee.gov	(414) 286-5903
Matt Childress	Tax Credit Manager- WHEDA	Matt.Childress@wheda.com	(608) 264-6843
Scott Sitter	Lender	ssitter@NicoletBank.com	(920) 267-8052

**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 using the AHF Affordable Housing Targeted Area 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.
- 4. A confirmation page demonstrating that an Initial Application for Energy Design Assistance was submitted to Focus on Energy
- 5. Written confirmation from the Zoning Administrator of permissive zoning or a letter confirming the proposed site's zoning status and process.

NOTE: If a preliminary site plan is not available at the time of application, submittal will be required for DAT on August 6, 2020 with submittal with week prior. If the Capital Needs Assessment is not available at the time of application for a rehab project, submittal will be required by August 19, 2020.

APPLICANT & PROJECT NAME:

**Northpointe Development, Uno- Madison**

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:						
<b>WHEDA</b>	\$ 6,179,000	y	4.65%	35	35	\$357,830
Subordinate Loan-Lender Name:						
Subordinate Loan-Lender Name:						
Tax Exempt Loan-Bond Issuer:						
AHP Loan	\$ 900,000	n	NA	NA	NA	NA
City-AHF Deferred Loan	\$ 715,000	n	0.00%	30	NA	NA
City-AHF Interest/Cash Flow Loan	\$ 715,000	y	2.75%	16	30	\$35,027
City-TIF Loan						
Other-Specify Lender/Grantor:						
Other-Specify Lender/Grantor:						
Other-Specify Lender/Grantor:						
Tax Credit Equity	\$ 5,654,559					
Historic Tax Credit Equity						
Deferred Developer Fees	\$ 1,330,449					
Owner Investment						
Other-Specify:						
<b>Total Sources</b>	<b>\$ 15,494,008</b>					

<b>Construction Financing</b>			
Source of Funds	Amount	Rate	Term (Months)
Construction Loan-Lender Name:			
<b>WHEDA</b>	\$ 6,179,000	4.65%	24
Bridge Loan-Lender Name:			
<b>WHEDA</b>	\$ 4,000,000	3.00%	24
Tax Credit Equity:			
<b>Investor TBD</b>	\$ 848,183	NA	NA
<b>Total</b>	<b>\$ 11,027,183</b>		

Estimated pricing on sale of Federal Tax Credits: **\$ 0.91**

Estimated pricing on sale of State Tax Credits: **\$ 0.71**  
(if applicable)

Remarks Concerning Project Funding Sources:

WHEDA will issue both long term and short term bonds for the project. Long term bonds will be used for construction as 24 months Interest only followed by 35 year term and amort perm loan. The short term bonds will be used for construction only and then paid off after 24 months. We are assuming using other sources (AHP, City funds, developer fees) as construction sources as well.

APPLICANT:

**Northpointe Development**

2. PROJECT EXPENSES

Enter the proposed project expenses

Acquisition Costs	Amount
Land	\$1,100,000
Existing Buildings/Improvements	\$0
Other (List)	
	\$0
<b>Construction:</b>	
Construction/Rehab Costs	\$8,321,000
Construction Profit	\$478,232
Construction Overhead	\$187,542
General Requirements	\$446,529
Construction Supervision	\$0
FF&E/Personal Property	\$65,575
Demolition	\$100,000
Site Work	\$200,000
Landscaping	\$50,000
Letter of Credit/P&P Bond	\$28,000
Construction Contingency	\$502,144
Other (List)	
	\$0
<b>Architectural &amp; Engineering</b>	
Architect - Design	\$180,000
Architect - Supervision	\$30,000
Engineering	\$35,000
Other (List)	
Architect-Reimbursements	\$39,000
<b>Interim/Construction Costs</b>	
Builder's Risk/Property Insurance	\$18,900
Construction Loan Interest	\$400,000
Construction Loan Origination Fee	\$40,000
Real Estate Taxes	\$35,000
Park Impact Fees	\$96,000
Other Impact Fees	\$0
Other (List)	
	\$0
<b>Financing Fees</b>	
Cost of Bond Issuance	\$0
Permanent Loan Origination Fee	\$92,685
Credit Enhancement	\$0
Other Permanent Loan Fees	\$0
<b>Soft Costs</b>	
Appraisal	\$14,000
Market Study	\$7,000

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

Solar
Green Built Homes Cert

Total Cost:

\$280,000

Environmental Reports	\$12,000
Survey	\$6,400
Permits	\$100,000
Lease-Up Period Marketing	\$25,000
Tax Credit Fees - Application	\$2,500
Tax Credit Fees - Compliance	\$0
Tax Credit Fees - Allocation	\$68,000
Accounting/Cost Certification	\$15,000
Title Insurance and Recording	\$25,000
Relocation	\$0
FF&E	\$0
Capital Needs Assessment (if rehab)	\$0
Legal	\$50,000
Other (List)	
	\$0
<b>Fees:</b>	
Bridge Loan Fees	\$0
Organizational Fees	\$2,000
Syndication Fees	\$10,000
Total Development Fee	\$2,336,501
Developer Overhead	\$0
Other Consultant Fees	\$0
Other (List)	
	\$0
<b>Reserves Funded from Capital:</b>	
Lease-Up Reserve	\$25,000
Operating Reserve	\$350,000
Replacement Reserve	\$0
Capital Needs Reserve	\$0
Debt Service Reserve	\$0
Escrows	\$0
<b>Other: (List)</b>	
	\$0
<b>TOTAL COSTS:</b>	<b>\$15,494,008</b>

APPLICANT: Northpointe Development

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	775,752	791,267	807,092	823,234	839,699	856,493	873,623	891,095	908,917	927,095	945,637	964,550	983,841	1,003,518	1,023,588	1,044,060
Less Vacancy/Bad Debt	54,303	55,389	56,496	57,626	58,779	59,955	61,154	62,377	63,624	64,897	66,195	67,519	68,869	70,246	71,651	73,084
<b>Income from Non-Residential Use*</b>	<b>47,876</b>	<b>48,834</b>	<b>49,810</b>	<b>50,806</b>	<b>51,823</b>	<b>52,859</b>	<b>53,916</b>	<b>54,994</b>	<b>56,094</b>	<b>57,216</b>	<b>58,361</b>	<b>59,528</b>	<b>60,718</b>	<b>61,933</b>	<b>63,171</b>	<b>64,435</b>
<b>Total Revenue</b>	<b>769,325</b>	<b>784,712</b>	<b>800,406</b>	<b>816,414</b>	<b>832,743</b>	<b>849,397</b>	<b>866,385</b>	<b>883,713</b>	<b>901,387</b>	<b>919,415</b>	<b>937,803</b>	<b>956,559</b>	<b>975,691</b>	<b>995,204</b>	<b>1,015,108</b>	<b>1,035,411</b>
<b>Expenses:</b>																
Office Expenses and Phone	9,000	9,270	9,548	9,835	10,130	10,433	10,746	11,069	11,401	11,743	12,095	12,458	12,832	13,217	13,613	14,022
Real Estate Taxes	90,000	92,700	95,481	98,345	101,296	104,335	107,465	110,689	114,009	117,430	120,952	124,581	128,318	132,168	136,133	140,217
Advertising, Accounting, Legal Fees	19,700	20,291	20,900	21,527	22,173	22,838	23,523	24,229	24,955	25,704	26,475	27,269	28,087	28,930	29,798	30,692
Payroll, Payroll Taxes and Benefits	49,500	50,985	52,515	54,090	55,713	57,384	59,106	60,879	62,705	64,586	66,524	68,520	70,575	72,692	74,873	77,119
Property Insurance	18,000	18,540	19,096	19,669	20,259	20,867	21,493	22,138	22,802	23,486	24,190	24,916	25,664	26,434	27,227	28,043
Mtc, Repairs and Mtc Contracts	36,540	37,636	38,765	39,928	41,126	42,360	43,631	44,940	46,288	47,676	49,107	50,580	52,097	53,660	55,270	56,928
Utilities (gas/electric/fuel/water/sewer)	53,000	54,590	56,228	57,915	59,652	61,442	63,285	65,183	67,139	69,153	71,228	73,364	75,565	77,832	80,167	82,572
Property Mgmt	38,466	39,620	40,809	42,033	43,294	44,593	45,930	47,308	48,728	50,189	51,695	53,246	54,843	56,489	58,183	59,929
Operating Reserve Pmt		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	18,000	18,540	19,096	19,669	20,259	20,867	21,493	22,138	22,802	23,486	24,190	24,916	25,664	26,434	27,227	28,043
Support Services	5,000	5,150	5,305	5,464	5,628	5,796	5,970	6,149	6,334	6,524	6,720	6,921	7,129	7,343	7,563	7,790
Other (List)																
WHEDA Compliance fees	2,700	2,781	2,864	2,950	3,039	3,130	3,224	3,321	3,420	3,523	3,629	3,737	3,850	3,965	4,084	4,207
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Operating Expenses</b>	<b>339,906</b>	<b>350,103</b>	<b>360,606</b>	<b>371,424</b>	<b>382,567</b>	<b>394,044</b>	<b>405,866</b>	<b>418,042</b>	<b>430,583</b>	<b>443,500</b>	<b>456,805</b>	<b>470,509</b>	<b>484,625</b>	<b>499,163</b>	<b>514,138</b>	<b>529,562</b>
<b>Net Operating Income</b>	<b>429,419</b>	<b>434,609</b>	<b>439,800</b>	<b>444,990</b>	<b>450,175</b>	<b>455,353</b>	<b>460,520</b>	<b>465,672</b>	<b>470,805</b>	<b>475,915</b>	<b>480,998</b>	<b>486,050</b>	<b>491,066</b>	<b>496,041</b>	<b>500,970</b>	<b>505,848</b>
<b>Debt Service:</b>																
First Mortgage	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830
Second Mortgage		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
Investor Mgmt Fees	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Debt Service</b>	<b>365,330</b>	<b>365,330</b>														
<b>Total Annual Cash Expenses</b>	<b>705,236</b>	<b>715,433</b>	<b>725,936</b>	<b>736,754</b>	<b>747,897</b>	<b>759,374</b>	<b>771,196</b>	<b>783,372</b>	<b>795,913</b>	<b>808,830</b>	<b>822,135</b>	<b>835,839</b>	<b>849,955</b>	<b>864,493</b>	<b>879,468</b>	<b>894,892</b>
<b>Total Net Operating Income</b>	<b>64,089</b>	<b>69,279</b>	<b>74,470</b>	<b>79,660</b>	<b>84,845</b>	<b>90,023</b>	<b>95,190</b>	<b>100,342</b>	<b>105,475</b>	<b>110,585</b>	<b>115,668</b>	<b>120,720</b>	<b>125,736</b>	<b>130,711</b>	<b>135,640</b>	<b>140,518</b>
<b>Debt Service Reserve</b>	<b>0</b>	<b>0</b>														
<b>Deferred Developer Fee</b>	<b>64,089</b>	<b>69,279</b>	<b>74,470</b>	<b>79,660</b>	<b>84,845</b>	<b>90,023</b>	<b>95,190</b>	<b>100,342</b>	<b>105,475</b>	<b>110,585</b>	<b>115,668</b>	<b>120,720</b>	<b>125,736</b>	<b>130,711</b>	<b>135,640</b>	<b>140,518</b>
<b>Cash Flow</b>	<b>0</b>	<b>36,344</b>	<b>135,640</b>	<b>140,518</b>												
AHF City Interest Loan	0	0	0	0	0	0	0	0	0	0	0	0	0	36,344	135,640	140,518

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

<b>DCR Hard Debt</b>	1.20	1.21	1.23	1.24	1.26	1.27	1.29	1.30	1.32	1.33	1.34	1.36	1.37	1.39	1.40	1.41
<b>DCR Total Debt</b>	1.18	1.19	1.20	1.22	1.23	1.25	1.26	1.27	1.29	1.30	1.32	1.33	1.34	1.23	1.00	1.00

**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:

Parking \$55/ month for underground
-------------------------------------

Other  
AHF loan is 16 year term

APPLICANT:

Northpointe Development

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	1,064,941	1,086,240	1,107,965	1,130,124	1,152,727	1,175,781	1,199,297	1,223,283	1,247,748	1,272,703	1,298,157	1,324,121	1,350,603	1,377,615
Less Vacancy/Bad Debt	74,546	76,037	77,558	79,109	80,691	82,305	83,951	85,630	87,342	89,089	90,871	92,688	94,542	96,433
<b>Income from Non-Residential Use*</b>	<b>65,723</b>	<b>67,038</b>	<b>68,379</b>	<b>69,746</b>	<b>71,141</b>	<b>72,564</b>	<b>74,015</b>	<b>75,496</b>	<b>77,006</b>	<b>78,546</b>	<b>80,117</b>	<b>81,719</b>	<b>83,353</b>	<b>85,020</b>
<b>Total Revenue</b>	<b>1,056,119</b>	<b>1,077,241</b>	<b>1,098,786</b>	<b>1,120,762</b>	<b>1,143,177</b>	<b>1,166,041</b>	<b>1,189,361</b>	<b>1,213,149</b>	<b>1,237,412</b>	<b>1,262,160</b>	<b>1,287,403</b>	<b>1,313,151</b>	<b>1,339,414</b>	<b>1,366,202</b>
<b>Expenses:</b>														
Office Expenses and Phone	14,442	14,876	15,322	15,782	16,255	16,743	17,245	17,762	18,295	18,844	19,409	19,992	20,591	21,209
Real Estate Taxes	144,424	148,756	153,219	157,816	162,550	167,427	172,449	177,623	182,951	188,440	194,093	199,916	205,913	212,091
Advertising, Accounting, Legal Fees	31,613	32,561	33,538	34,544	35,580	36,648	37,747	38,880	40,046	41,247	42,485	43,759	45,072	46,424
Payroll, Payroll Taxes and Benefits	79,433	81,816	84,270	86,799	89,403	92,085	94,847	97,693	100,623	103,642	106,751	109,954	113,252	116,650
Property Insurance	28,885	29,751	30,644	31,563	32,510	33,485	34,490	35,525	36,590	37,688	38,819	39,983	41,183	42,418
Mtc, Repairs and Mtc Contracts	58,636	60,395	62,207	64,073	65,995	67,975	70,014	72,115	74,278	76,507	78,802	81,166	83,601	86,109
Utilities (gas/electric/fuel/water/sewer)	85,049	87,601	90,229	92,936	95,724	98,596	101,553	104,600	107,738	110,970	114,299	117,728	121,260	124,898
Property Mgmt	61,727	63,578	65,486	67,450	69,474	71,558	73,705	75,916	78,193	80,539	82,955	85,444	88,007	90,648
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	28,885	29,751	30,644	31,563	32,510	33,485	34,490	35,525	36,590	37,688	38,819	39,983	41,183	42,418
Support Services	8,024	8,264	8,512	8,768	9,031	9,301	9,581	9,868	10,164	10,469	10,783	11,106	11,440	11,783
Other (List)														
	4,333	4,463	4,597	4,734	4,877	5,023	5,173	5,329	5,489	5,653	5,823	5,997	6,177	6,363
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Expenses</b>	<b>545,449</b>	<b>561,813</b>	<b>578,667</b>	<b>596,027</b>	<b>613,908</b>	<b>632,325</b>	<b>651,295</b>	<b>670,834</b>	<b>690,959</b>	<b>711,688</b>	<b>733,038</b>	<b>755,029</b>	<b>777,680</b>	<b>801,011</b>
<b>Net Operating Income</b>	<b>510,670</b>	<b>515,428</b>	<b>520,119</b>	<b>524,735</b>	<b>529,269</b>	<b>533,715</b>	<b>538,066</b>	<b>542,315</b>	<b>546,453</b>	<b>550,472</b>	<b>554,365</b>	<b>558,122</b>	<b>561,734</b>	<b>565,192</b>
<b>Debt Service:</b>														
First Mortgage	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830	357,830
Second Mortgage	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)														
Investor Mgmt Fees														
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Debt Service</b>	<b>357,830</b>													
<b>Total Annual Cash Expenses</b>	<b>903,279</b>	<b>919,643</b>	<b>936,497</b>	<b>953,857</b>	<b>971,738</b>	<b>990,155</b>	<b>1,009,125</b>	<b>1,028,664</b>	<b>1,048,789</b>	<b>1,069,518</b>	<b>1,090,868</b>	<b>1,112,859</b>	<b>1,135,510</b>	<b>1,158,841</b>
<b>Total Net Operating Income</b>	<b>152,840</b>	<b>157,598</b>	<b>162,289</b>	<b>166,905</b>	<b>171,439</b>	<b>175,885</b>	<b>180,236</b>	<b>184,485</b>	<b>188,623</b>	<b>192,642</b>	<b>196,535</b>	<b>200,292</b>	<b>203,904</b>	<b>207,362</b>
<b>Debt Service Reserve</b>	<b>0</b>													
<b>Deferred Developer Fee</b>	<b>0</b>													
<b>Cash Flow</b>	<b>152,840</b>	<b>157,598</b>	<b>162,289</b>	<b>166,905</b>	<b>171,439</b>	<b>175,885</b>	<b>180,236</b>	<b>184,485</b>	<b>188,623</b>	<b>192,642</b>	<b>196,535</b>	<b>200,292</b>	<b>203,904</b>	<b>207,362</b>
AHF City Interest Loan	0	0	0	0	0	0	0	0	0	0	0	0	0	0

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

<b>DCR Hard Debt</b>	1.43	1.44	1.45	1.47	1.48	1.49	1.50	1.52	1.53	1.54	1.55	1.56	1.57	1.58
<b>DCR Total Debt</b>	1.43	1.44	1.45	1.47	1.48	1.49	1.50	1.52	1.53	1.54	1.55	1.56	1.57	1.58

**Assumptions**

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

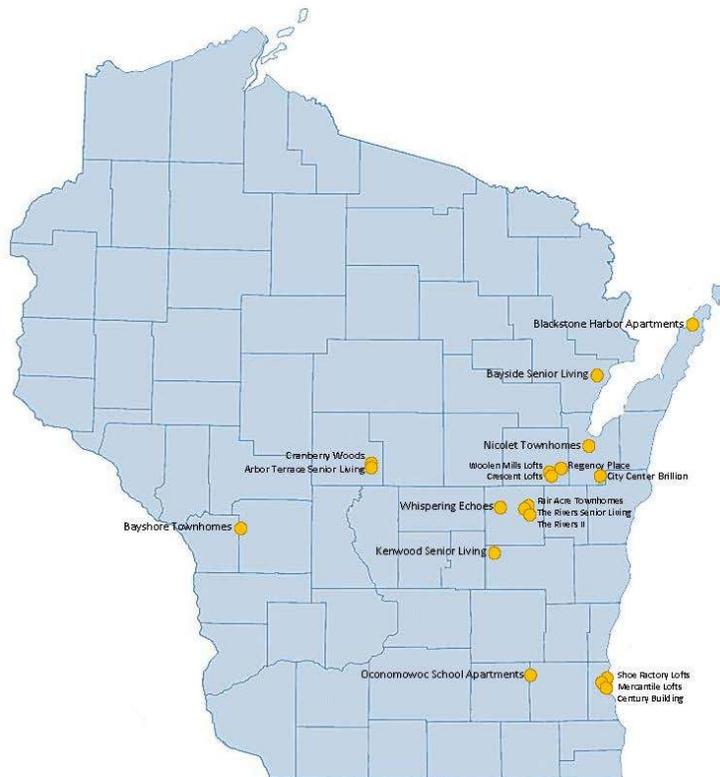


230 Ohio Street, Suite 200  
 Oshkosh, WI 54902  
 Office: (920) 230-3628  
 Fax: (920) 230-6484

## NORTHPOINTE DEVELOPMENT CORPORATION

Northpointe Development Corporation is a real estate development company created for the purpose of bringing revitalization and development to various neighborhoods in Wisconsin. Northpointe envisions vibrant communities that strengthen neighborhoods, enhance livelihoods, respond to the environment, and connect people and places. The company’s mission is to provide sustainable housing for communities in a collaborative, honest, and transparent manner. Northpointe has a great reputation with the communities where we’ve developed housing and with WHEDA. Northpointe is one of WHEDA’s largest and long-term customers and consistently scores the highest developer team score possible for a for profit developer. Northpointe and its principals have the financial capacity to successfully complete the project as well as secure market to above market equity pricing. Personal Financials of Northpointe’s principals will be submitted upon request.

Northpointe, as shown below, has developed new construction family and senior apartment housing, historic rehabilitation, and commercial properties throughout Wisconsin. Most of the projects have utilized the Low-Income Housing Tax Credit program as well as other available resources including: Home, TIF, Brownfield Grants, Federal and State Historic Credits. Connecting with government entities, including the Department of Natural Resources, HUD, WHEDA, WEDC, the Federal Energy Regulatory Commission, etc is commonly required to successfully complete the development project. The company has received numerous awards including: the 2013 Top Projects Award in Milwaukee, 2015 National Historic Preservation Award, 2014 runner-up for the prestigious J. Timothy Anderson National Award for Excellence, 2017 Wisconsin Trust for Historic Preservation Award, 2019 Remarkable Milwaukee Award and the 2019 Carolyn Kellogg Historic Preservation Award.



## **Multi Family Developments**

<b><u>Project Name</u></b>	<b><u>Location</u></b>		<b><u>Units</u></b>	<b><u>Property Type</u></b>
Rivers Senior Living	Oshkosh	WI	60	New Construction 9% LIHTC
Bayshore Townhomes	Sparta	WI	32	New Construction 9% LIHTC
Fair Acre Townhomes	Oshkosh	WI	55	New Construction 9% LIHTC
Kenwood Senior Living	Ripon	WI	24	New Construction 9% LIHTC
The Fountains of West Allis	West Allis	WI	35	Acquisition/Rehab 9% LIHTC
Blackstone Harbor Apts.	Sister Bay	WI	24	New Construction 9% LIHTC
Oconomowoc School Apts	Oconomowoc	WI	55	Adaptive /Historic 9% LIHTC
Nicolet Townhomes	De Pere	WI	60	New Construction 9% LIHTC
Anthem Luxury Living	Oshkosh	WI	80	New Construction 20/80
Mercantile Lofts	Milwaukee	WI	36	Adaptive /Historic 9% LIHTC
Shoe Factory Lofts	Milwaukee	WI	55	Adaptive /Historic 9% LIHTC
The Rivers - Phase II-Senior Living	Oshkosh	WI	40	New Construction 9% LIHTC
Woolen Mills Lofts	Appleton	WI	60	Adaptive /Historic 9% LIHTC
Century Building	Milwaukee	WI	44	Adaptive /Historic 9% LIHTC
Cranberry Woods Townhomes	Wisconsin Rapids	WI	40	New Construction 9% LIHTC
Bayside Senior Apartments	Oconto	WI	42	New Construction 9% LIHTC
Whispering Echoes Townhomes	Winneconne	WI	28	New Construction 9% LIHTC
Regency Place Senior Living	Little Chute	WI	40	New Construction 9% LIHTC
<b><u>Under Construction</u></b>				
Arbor Terrace Senior Living	Wisconsin Rapids	WI	40	New Construction 9% LIHTC
City Center	Brillion	WI	40	New Construction 9% LIHTC
Crescent Lofts	Appleton	WI	69	Adaptive /Historic 9% LIHTC
<b><u>2020 Awards</u></b>				
The Limerick	Fitchburg	WI	126	New Construction 4% State
Cabrini	Oshkosh	WI	33	Adaptive/ Historic 4% State
<b>Total Units</b>			<b>1,117</b>	

## **Integrated Supportive Housing**

A majority of the tax credit projects that Northpointe has developed have included Integrated Supportive Housing with 15-20% of the units being reserved for a targeted population. Northpointe has worked with various agencies to provide supportive services to the tenants.

## NORTHPOINTE DEVELOPMENT PRINCIPALS

Cal Schultz  
420 South Koeller Street  
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Andy Dumke  
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[andy@northpointedev.com](mailto:andy@northpointedev.com)

Sean O'Brien  
2628 Saw Tooth Drive  
Fitchburg, WI 53711  
(608) 334-5665  
[sean@northpointedev.com](mailto:sean@northpointedev.com)

### **Callan L. Schultz**

Callan Schultz graduated from the University of Wisconsin-Oshkosh with a Bachelor of Business Administration with majors in finance and management information systems and a Masters of Business Administration. Cal is a licensed Wisconsin Real Estate Broker. He was a 1999 class member of the Massachusetts Institute of Technology "Birthing of Giants" program.

Cal formed Keystone Development, LLC in 1999. The company has developed over 2,000 apartment units throughout Wisconsin, Michigan, Ohio and Iowa. In 2011 he and Andy Dumke formed Northpointe Development Corporation for the purpose of developing and owning affordable housing in Wisconsin.

### **Andrew J. Dumke**

Andrew Dumke began developing and managing real estate in 1993. He has grown his portfolio to include multi-family apartments, commercial office buildings, warehouse buildings, and retail centers.

His company Alliance Development has developed over \$200,000,000 in real estate. Samples of nationally accredited tenants he works with are Starbucks, Panera, Fed EX/Kinkos, TJ Maxx, JoAnn Fabrics, US Cellular, Verizon, Buffalo Wild Wings, Chipotle, Qdoba, Baker Tilly, Old National Bank, and Olive Garden. Andrew's current portfolio contains over 1,000,000 square feet of commercial office, warehouse, and retail space.

In 2011, Andrew started Northpointe Development Corporation in conjunction with Cal Schultz. The purpose of this entity is to develop, own and provide market-rate, affordable, and senior housing in Wisconsin.

### **Sean O'Brien**

Sean O'Brien joined Northpointe Development as a Partner in 2020. With over 15 years of housing and community development experience, Sean is excited to help grow Northpointe Development's state and national footprint.

Prior to joining Northpointe Development, Sean worked at the Wisconsin Housing and Economic Development Authority (WHEDA) for 14 years. The last 6 years of his tenure he was the Director of Commercial Lending. As Director, Sean led the development of Wisconsin's Affordable Housing Policy and allocation of the Low-Income Housing Tax Credit Program. In 2018, the Commercial Lending team implemented the State Housing Tax Credit Program which allowed WHEDA to allocate a new credit that has created or preserved approximately a thousand affordable homes annually. For three years, Sean also served on the Community Investment Advisory Council for the Federal Home Loan Bank of Chicago.

Sean is a Verona Area High School Graduate and holds a Bachelor of Business Administration degree from the University of Wisconsin - Madison. In 2019, Sean and his wife Emily created OB Development, LLC with the intention of providing development in consulting services for the creation and preservation of decent, safe and affordable housing.



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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 4000 apartments throughout Wisconsin's major markets and Illinois. Headquartered in Oshkosh, WI, 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.

Commitment, trust, and reliability is the foundation of our relationships with residents, employees, and partners. Our team works hard to earn the loyalty needed to develop and retain the long-term relationships associated with our shared success.

There are over 100,000 apartments built each year with the use of Low-Income Housing Tax Credits (LIHTC). Over the years, the LIHTC program and other affordable housing programs have become increasingly competitive, and as a result, complex. Most developments with an affordable housing component have multiple layers of financing, each with associated requirements. This includes varying regulations, reporting, and oversight requirements for Section 42 LIHTC, Project Based Section 8, AHP, HOME, and Rural Development. It also includes new components such as preferences, new set asides, RAD and more. Adhering to program requirements during the first year, and each subsequent year during the regulatory period is essential to any successful affordable housing real estate development.

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. ACC's experienced team of compliance professionals assist you through the initial stages of your development and the entire regulatory period for your property.

With combined affordable housing management experience of nearly 100 years, ACC's leadership team is well qualified to ensure compliance with all regulatory agreements and provide valuable input throughout the development process.

Annually, ACC participates in new affordable housing developments as the management agent and compliance expert. ACC's leadership team typically becomes involved 12-18 months prior to the expected completion date. We offer our clients a fresh perspective on building design, staffing needs, market trends, and much more. As the completion date approaches, ACC's efforts increase and all hands are on deck for the lease-up of the new development. All applicants are qualified and the development is typically fully leased within 30 – 90 days of the completion date with full compliance of all regulatory agreements.

Most recently, ACC has assisted developers transition multiple properties from Public Housing to Section 8 housing through HUD's RAD program.

ACC Management Group - Site List

Property	Units	Address	City, State, ZIP	Property Discription	Average Occupancy %	Managed Since:
5th Avenue Lofts	60	5821 5th Avenue	Kenosha, WI 53140	Section 42 - Family Site - 1 Building	97%	2015
700 Lofts	49	700 W Michigan Avenue	Milwaukee, WI 53208	Section 42 - Family Site - 2 Buildings	93%	2015
Anthem Luxury Living	80	431 Marion Road	Oshkosh, WI 54901	Market Rate - Family Site - 1 Building	97%	2015
Arbor Green	48	6001 55th Street	Kenosha, WI 53142	Section 42/Section 8 Family site - 7 Buildings	98%	2012
Arlington Heights / Glendale Heights	36	Scattered sites	Milwaukee, WI	Section 42 - Family Site - 2 Buildings	97%	2016
Badger State Lofts	118	1031 Maryland Ave.	Sheboygan, WI	Section 42 - Family - 1 Building	In Lease-up	2020
Barwell Manor	120	571 Genesee St.	Waukegan, IL 60085	Section 42 / Section 8 - Family 11 building	In Lease-up	2020
Bay Hill	68	613 N 12th Avenue #101	Sturgeon Bay, WI 54235	Rural Development layered with Section 42 - Family/Senior Site.	96%	1986
Bayfield Court	8	523 & 527 Bayfield Court	Jefferson, WI 53549	Market Rate	100%	2018
Bayshore Townhomes	32	623 E. Main St.	Sparta, WI 54656	Section 42 - Family	100%	2017
Bayside Senior Apartments	24	237 Cook Avenue	Oconto, WI 54153	Section 42/Senior site - 1 building	98%	2014
Bayview Terrace City	36	537 South Neenah Avenue	Sturgeon Bay, WI 54235	Rural Development - Senior Site - 3 Buildings	98%	2007
Bayview Terrace North	24	2261 Mill Rd.	Sister Bay, WI 54284	Section 8 senior site - 4 buildings	100%	2016
BCG Apartments	30	720 Grove Ave.	Wild Rose, WI 54984	Section 8 - mixed use - 2 Buildings	95%	2019
Blackhawk Apartments	8	635 & 655 W. Blackhawk Dr.	Fort Atkinson, WI	Market Rate - Family Site - 2 Buildings	100%	2017
Blackstone Harbor	24	10525 Judith Blazer Drive	Sister Bay, WI 54234	Section 42 - Family Site - 3 Buildings	100%	2013
Bradley Crossing 54	54	4417-4423 West Bradley Rd.	Brown Deer, WI 53209	Section 42 - Family	98%	2017
Bradley Crossing 60	60	4375 West Bradley Rd.	Brown Deer, WI 53209	Section 42 with 30 Sec 8 Vouchers - Family	98%	2017
Brookstone Townhomes	28	2831 Eggman Rd.	Fitchburg, WI 53713	Market Rate - Family	97%	2019
Central Park Towers	164	120 S State Street	Egin, IL 60123	RAD - Section 42 - 2 Buildings	97%	2014
Centralia View Apartments	40	301 7th Avenue South	Wisconsin Rapids, WI 54494	Section 42 - Senior Site - 1 Building	In Lease-up	2020
Century Building	44	808 North Old World 3rd Street	Milwaukee, WI 53203	Section 42 - Family Site - 1 Building	97%	2018
Chelsea Senior Commons	40	55 Chelsea Ave.	Sugar Grove, IL 60554	Section 42 - Senior Site - 1 Building	100%	2019
Cherry Woods Townhomes	40	2320-2330 16th St S; 2231-2241 14th St. S.	Wisconsin Rapids, WI	Section 42 - Family	100%	2018
Dartford Bay - Landing	33	504 S. Mill Street	Green Lake, WI 54941	Section 8 Eldery & Family: 2 buildings, Senior - 25, Family - 8	96%	2013
Deenwood Crossing	66	4195 W Bradley Road	Brown Deer, WI 53209	Section 42 - Senior Site - 1 Building	98%	2010
Deenwood Crossing II	30	4195 W Bradley Road	Brown Deer, WI 53209	Section 42 - Senior Site - 1 Building	98%	2014
Elven Stead Apartments	33	623 Eighth Street	Stoughton, WI 53589	Section 42 - Family Site - 3 Buildings	98%	2010
Eva Manor	50	2123 91st St	Pleasant Prairie, WI 53158	Section 42 - Family/Senior - 2 Buildings	98%	2019
Exchange @ 104	48	104 S. Main St.	Fond du Lac, WI 54935	Section 42 - Family Site - 1 Building (Historical)	95%	2018
Fair Acre Townhomes	55	1911 N Main Street	Oshkosh, WI 54901	Section 42 - Family Site - 6 Buildings	97%	2012
Fairview Crossing	40	728 Pleasantview Road	Plymouth, WI 53073	Rural Development - Family Site - 3 Buildings	97%	2009
Fairview Crossing II	24	29 E. Paine Street	Kiel, WI 53042	Rural Development - Family Site - 3 Buildings	100%	2010
Family Court Townhomes	74	Scattered sites	Egin, IL 60123	RAD - Section 42 - Scattered Site	99%	2016
Fox Crossing Apartments	24	200 Bridge Street	Burlington, WI 53105	Section 42 - Family Site - 1 Building	98%	2014
Fox Crossing II Apartments	32	180 Bridge Street	Burlington, WI 53105	Section 42 - Family Site - 1 Building	98%	2016
Garfield School	30	2215 N. Vel Phillips Ave.	Milwaukee, WI 53212	Section 42 - Family	98%	2020
Gold Medal Lofts	77	1701 Packard Ave.	Racine, WI 53403	Section 42 - Family	In Lease-up	2020
Griot	41	2235 N. Vel Phillips Ave.	Milwaukee, WI 53212	Section 42 - Family	98%	2020
Grand Ave Lofts	32	2905 W. Wisconsin Ave	Milwaukee, WI 53208	Section 42 - Family Site - 1 Building	95%	2013
Hartford Highlands Apartments	44	633 E Monroe Ave	Hartford, WI 53027	Market Rate - Family Site - 3 Buildings	97%	2013
Ingram Place	53	456 E. Brown St.	Milwaukee, WI 53212	Section 42 - Family Site - 1 Building	96%	2016
Janesville Garden Court	164	208 N. Main St.	Janesville, WI 53545	Section 8 - Senior Site - 1 Building	97%	2016
Jefferson Apartments	64	602 Collins Road	Jefferson, WI 53549	Section 8 - Section 42 - Rural Development - Family Site - 9 Buildings	97%	2010
Kenwood Senior Living	24	1479 Pleasant Street	Ripon, WI 54971	Section 42 - Senior Site - 1 Building	98%	2012
Lakeside Gardens	80	391A N. Peters Avenue	Fond du Lac, WI 54935	Section 42/Section 8 - Family Site - 17 Buildings	97%	2006
Layton Square	57	3553 E. Layton Ave.	Cudahy, WI 53110	Section 42 - Family Site - 1 Building	96%	2016
Lofts 2	44	5819 5th Avenue	Kenosha, WI 53140	Market Rate	98%	2017
Maple Lawn	81	1914 Pike Drive #1	Fitchburg, WI 53713	Section 42 - Family Site - 7 Buildings	97%	2012
Meadow Creek	37	1119 Roseland Drive	Kewaskum, WI 53040	Section 8 Eldery & Family: 3 Buildings, Senior - 25, Family - 12	96%	2013
Meadows of Mill Creek	24	247th Ave	Salem, WI 53168	Section 42 - Family Site - 12 Duplexes	98%	2013
Meadows of Mill Creek II	36	247th Ave	Salem, WI 53168	Section 42 - Family - 18 duplexes	Lease up 9/1/19	2019
Mercantile Lofts	36	611 W. National Ave.	Milwaukee, WI 53204	Market Rate - Family Site - 1 Building	93%	2016
Monroe Street Apartments	24	217 N. Monroe St.	Waterloo, WI	Section 42 - Family - 1 Building	95%	2017
Nicolet Townhomes	60	1380 Scheuring Road	De Pere, WI 54115	Section 42 - Family Site - 9 Buildings	97%	2014

ACC Management Group - Site List

Property	Units	Address	City, State, ZIP	Property Description	Average Occupancy %	Managed Since:
Northwoods	72	2520 N. Martin Luther King Drive	Milwaukee, WI 53212	Section 42/Section 8 - Family Site - 2 Buildings	95%	2005
Novation Senior Commons	60	2650 Novation Parkway	Madison, WI	Section 42 - Senior Site - 1 Building	95%	2018
Oconomowoc School Apartments	55	623 Summit Ave	Oconomowoc, WI 53066	Section 42 - Family Site - 1 Building	98%	2013
Orchard Valley Apartments	50	1252 N. 12th Pl.	Sturgeon Bay, WI 54235	Section 8 - Senior Site - 1 Building	98%	2020
Park Hill Senior Apartments	62	535 W. Concordia Avenue	Milwaukee, WI 53212	Section 8 - Senior Site - 1 Building	98%	2005
Parkview Village	84	Scattered sites	Appleton, WI	Section 8 - Section 42 - Family	95%	2006
Regency Place	40	628 Grand Ave.	Little Chute, WI 54140	Section 42 - Senior - 1 Building	100%	2019
Residences on Main	24	307 E. Main St	Twin Lakes, WI 53181	Section 42 - Senior Site - 1 Building	100%	2013
Rivers Edge	30	Scattered sites	Egin, IL	RAD - Section 42 - Scattered Site	100%	2017
Rose Terrace	36	3820 Wolf Crossing Rd.	Oswego, IL 60543	Section 42 - Senior Site - 1 Building	100%	2019
Scenic View Apts	48	205 Slinger Rd.	Slinger, WI 53086	RAD - Section 42	100%	2017
Seven Oaks (formerly Nob Hill)	254	1108 Moorland Rd	Madison, WI 53713	Section 42 - Family Site - 7 Buildings	96%	2012
Shoe Factory Lofts	55	224 W. Washington St.	Milwaukee, WI 53204	Section 42 - Family Site - 1 Building	98%	2016
Silvercrest Apartments	36	630 S Cogswell Drive	Silver Lake, WI 53170	Section 42/Section 8 Senior/Family Site - 2 Buildings	99%	2012
Terrace Heights	50	1321G Townline Rd	Wausau, WI 54403	Section 42/Section 8 - Family Site - 9 Buildings	98%	1986
The Meadows	52	318 Dempsey Dr.	Elburn, IL 60119	Section 42 - Senior Site - 1 Building	100%	2019
The Rivers - Phase II	40	455 Marion Rd.	Oshkosh, WI 54901	Section 42 - Senior Site - 1 Building	99%	2016
The Rivers Senior Living	60	475 Marion Road	Oshkosh, WI 54901	Section 42 - Senior Site - 1 Building	97%	2015
The Vista at Creekside	140	6941 91st St.	Pleasant Prairie, WI 53158	Section 42 - Family	In Lease-up	2020
Uplands Homes	40	249 Musket Ridge Drive	Sun Prairie, WI 53590	Section 42 - Family Site - 18 Buildings	98%	2006
Villa West	170	1650 9th St	Green Bay, WI 54304	Section 8 Elderly	99%	2017
VMC Lofts	60	2122 56th Street	Kenosha, WI 53140	Section 42 - Family	100%	2019
Waupaca County Apartments	148	Scattered sites	Waupaca County	Section 8 Eldery & Family	96%	2017
Westwood Townhouses	36	1520 23rd Ave. South	Wisconsin Rapids, WI 54495	Section 8 - Family	98%	2020
Whispering Echoes Townhomes	28	407 S. 5th St.	Winneconne, WI	Section 42 - Family	100%	2018
Whitetail Ridge	60	25821 76th St.	Paddock Lake, WI 53168	Section 42 - Family/Senior - 2 Buildings	98%	2019
Whitewater Woods	40	340 N Newcomb St Apt	Whitewater, WI 53190	Section 42 - Rural Development - 5 Buildings	95%	2015
Willow Heights	64	1460 Wellington Way	Decatur, IL 62526	Section 8 - Senior Site - 1 Building	95%	2007
Woolen Mills	60	218 E. South Island St.	Appleton, WI 54915	Section 42 Family - 1 Building	100%	2017
	4706					



## **ACC Corporate Team**

### **Chris Hand, CPM** President / Owner

Chris Hand joined ACC Management Group as a Partner and Director of Operations in 2016 and became President and Owner in 2018. Chris provides leadership and oversight of all ACC Management Group operations. He works closely with ACC's Leadership Team, Regional Property Managers, and corporate staff to maximize returns for clients and to provide extraordinary living experiences for residents. In the twelve years prior to ACC, Chris held the positions of Director of Affordable Housing, Director of Business Development, and Executive Team member of a Wisconsin-based property management company. He holds a Bachelor of Science degree in Economics from the University of Wisconsin – Madison and is a Certified Property Manager (CPM) through the Institute of Real Estate Management (IREM). Chris resides in Oshkosh, WI with his wife Heather and their three children.

### **Rose M. Andler, HCCP, COS, STAR** Vice President

Rose Andler joined ACC Management Group in 2001 as Director of Operations. She served as President and owner from 2007 – 2017. She has over 30 years of experience in business management, which includes 10 years on-site property management and 20+ years at the corporate level in regional management. She brings a wealth of knowledge from both the property management industry and the hotel industry and has achieved industry distinction. Rose directly oversees financial operations for all properties in ACC's portfolio. With her vast knowledge in all affordable housing programs, including Section 42, Section 8, RAD, HOME, and RD, Rose is extensively involved in program compliance. Additionally, she is central in ACC's efforts to train and advise the next generation of ACC employees.

**Dewayne Pohl, Broker, TCS**

Facilities Director / Broker

Dewayne Pohl has over 35 years of management experience across multiple industries with the majority in real estate, including over 25 years as a licensed real estate broker. He holds the Graduate Realtor Institute (GRI) from the National Realtors Association and the Tax Credit Specialist (TCS) certification from the National Center for Housing Management. His extensive background in facilities is critical to ACC's property management operations. As part of the executive management team, Dewayne oversees facilities management throughout the portfolio, including site inspections, preventative maintenance, capital expenditure coordination, and vendor negotiation. He is highly involved in all investor, state, and federal property inspections including REAC, WHEDA, and IHDA. With his broad background in property management and logical approach to operations, Dewayne often provides valuable cost-saving feedback to developers during the design stage of each development.

**Mary Wangerin, HCCP, COS**

Director of Operations

Mary Wangerin has over 20 years of management experience. She has an extensive 15-year background in affordable housing and holds a Wisconsin real estate license. As part of the executive management team, Mary oversees new property setup and integration, marketing, and compliance. She coordinates ACC's efforts on all lease-ups from the initial set up to 100% occupancy. Additionally, she is ACC's corporate software trainer and is instrumental in developing training systems.

Mary also has over 20 years of marketing and design experience with a strong background in internet design and development. Working with both business to business and business to consumer clients, she has designed and developed numerous websites, intranets, online advertising campaigns, direct mailings and print collateral.

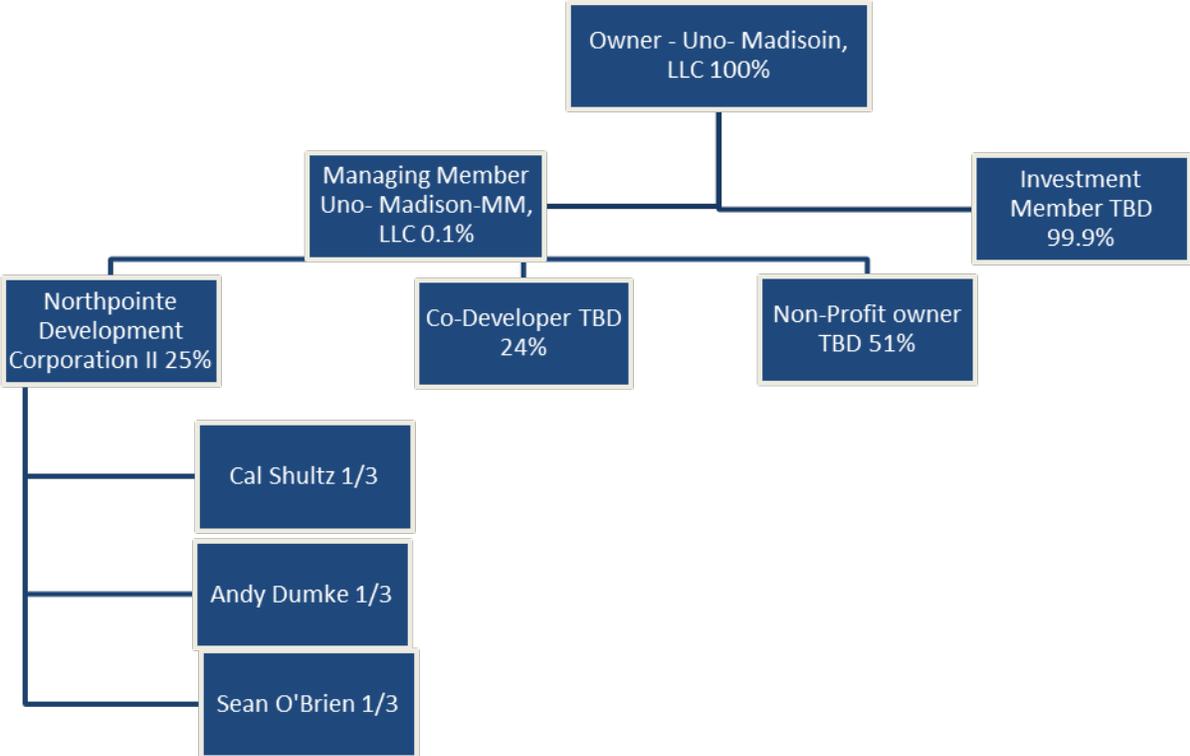
**Heather Hand, HCCP, TCS**

Director of Property Management / Principal

Heather Hand joined ACC as a Regional Manager and then became Director of Property Management in 2018. Heather provides leadership and oversight of all stabilized property management operations with a focus on team development, maximizing use of property management software, and standardization of procedures.

With her Accounting degree from the University of Wisconsin – Madison, she got her start as a property accountant at a Wisconsin-based property management company. She eventually transitioned to Regional Manager and then Director of Property Management overseeing market-rate and affordable multi-family housing, condominiums, and resorts throughout southcentral Wisconsin. Additionally, she was a multi-state Regional Manager for a nationally recognized developer and property management company.

# Uno- Madison Ownership Structure



**Uno's Madison**  
**7601 Mineral Point Road, Madison, WI**

**Supportive Service Plan**  
**WHEDA APPENDIX S - NARRATIVE**

**Characteristics of the specific target population.**

Individuals or Veterans that are experiencing homeless or at-risk for becoming homeless as well as formally homeless families. Assist households in re-establishing independence and self-sufficiency through Case Management services, such as budgeting, daily living skills education, coordination of benefits counseling, health care assessments, housing assistance, family counseling, as well as and employment placement.

**Describe how the proposal addresses the local area's housing priorities and needs.**

There is clearly a need for affordable housing in the City of Madison and specifically for homeless or at-risk households. Currently there are 486 individuals and 130 families listed on the Dane County Homeless Consortium's webpage. Also, according to the United States Census Bureau, Dane County has a large population of military personnel who served in the Vietnam War.

The project will provide affordable housing options for individuals at or below 30% CMI, 50% CMI, and 80% CMI. The property will have a total of 60 units of which 20% or 12 units will be set-a-side for the target population at or below the 30% CMI level. Through the efforts of the property management staff, support service providers and case managers, the property will work with the services provided by the Middleton Outreach Ministry, Veterans Assistance Foundation and the various public and private agencies in providing the quality housing needed at affordable level needed in the community along with the support services needed by our tenants. Federal housing subsidies have been greatly reduced in recent years and the project is ideally suited to fill the gap for the affordable housing needs.

**Evidence of outreach activities and engagement with local collaborative long-term support partners specifically to reach target population.**

Middleton Outreach Ministry  
3502 Parmenter Street, Middleton, WI  
608.826.3417

MOM brings our community together to create food and housing security through action and advocacy, for neighbors in West Madison, Middleton and Cross Plains. MOM hosts one of the largest food pantries in Dane County. Nearly half of those served through MOM are children.

Joining Forces for Families  
7011 Flower Lane #A  
Madison WI 53717

Joining Forces for Families (JFF) is a voluntary, community-based, supportive service that helps families address their basic human needs. By quickly linking clients to resources, JFF often keeps families stable and deflects them away from costly formal system interventions.

The JFF program encourages cooperation between agencies in caring for families. JFF uses the combined talents and resources of the Dane County Human Services Department, public health, county and local law enforcement agencies, school districts, human services organizations, and residents to support the success of children, youth and families in home, school and the community.

Wisconsin Department of Veterans Affairs  
2135 Rimrock Road, Madison, WI 53713  
608.266.1311

Programs included in the department's mission are the: Wisconsin Veterans Homes, Wisconsin Veterans Memorial Cemeteries, Veterans Administration Regional Claims Office, Military Funeral Honors Program, Veterans Assistance Program and the Wisconsin Veterans Museum. These programs are designed to provide health, educational assistance, economic assistance and other services to specified veterans of the armed forces of the United States.

U.S. Department of Veterans Affairs  
5400 W. National Avenue, Milwaukee, WI 53214  
800.273.8255

The U.S. Department of Veterans Affairs offers numerous benefits and services to veterans. Services include: housing assistance, medical services and counseling, career training and placement, educational and vocational counseling, independent living services, transportation, financial support, and housing.

Wisconsin Department of Veterans Affairs (WDVA)  
201 W. Washington Avenue, Madison, WI 53707  
800.947.8387

The WDVA provides numerous benefits and services to Wisconsin veterans and works closely with the county veteran service officers. Services include: health care aide including medical, dental, vision and hearing, grants and financial aid, housing and nursing and skilled care for elderly.

Dane County Veterans Services Office  
210 Martin Luther King Jr Blvd, Madison, WI 53703  
608.266.4158

The Mission of CVSO is to assist Dane County veterans and their families with obtaining local, state, and federal veterans benefits. The Dane County Veterans Service Office is committed to customer service and advocacy as veterans seek out eligible benefit entitlements.

Eligibility screening and assessment procedures to affirmatively market units specifically for the target population being proposed for the units.

The property management staff and Service Provider will ensure equal opportunity and affirmatively further fair housing. Through affirmative measures we will ensure access for assisted veterans housing regardless of race, color, religion, national origin, sex, familial status and disability. The property design will also provide accessible housing to person with all varieties of disabilities.

See attached Fair Housing Policy.

Potential residents from the target population will be offered housing on a first-come basis unless referred to the property from the Homeless Services Consortium service provider. The service provider and or the Veterans Case Manager will assess each individual or family to determine needs and coordinate with the various public and private agencies in providing the most effective supportive services needed.

A waiting list policy specifically designed for the target population, which includes engagement with the specified local collaborative long-term support partner(s).

A waiting list will be maintained with housing available on a first come basis. Individuals and families referred by service provider or any of the local or state veterans organizations will be placed on the waiting list if a housing option is not currently available with priority status. The waiting list will be routinely updated and status of available apartments will be communicated to the individual/family or referral agency to ensure delivery of housing as soon as it is made available.

Description of how supportive services will be made available to tenants, outlining the role of any primary and collaborative service provider partners, including all publicly and privately available resources. Include engagement strategies that will be used to ensure tenants have choice of service provider, regardless of supportive housing management plan in place.

Prior to completion of the building, management will contact all of the service providers in determining available services currently offered. A Support Service Reference Manual will be created which will be used to explain to residents the options for services.

Determination of supportive services and assistance needed by residents will initially be determined by the Services providers prior to their residency. The appropriate agency or organization would then be contacted to availability for the services or funding. In some cases there are options for services or funding while others are very limited and depend on availability or current funding. Coordination with the agency will be provided and assistance to the resident to complete necessary procedures and application process.

Partial List of Services:

- Vocational and rehabilitation counseling;
- Employment and training;
- Educational assistance;
- Health care services;

- Daily living services;
- Personal financial services;
- Transportation;
- Income support;
- Fiduciary and representative payee services;
- Legal services;
- Housing counseling;
- Time-limited payments to third parties to maintain or obtain housing.



## **FAIR HOUSING**

ACC Management Group firmly believes in upholding all Federal, State and Local Fair Housing Laws and requires strict compliance by its employees. Through education, seminars and to avoid discrimination lawsuits, ACC keeps its employees current on all changes regarding Fair Housing. Failure to abide by these guidelines can create damaging financial consequences. This section is provided to outline your responsibilities in relation to this important area of property management.

### **A. FAIR HOUSING - PROTECTED CLASSES**

Fair Housing Laws will always impact the marketing of your apartment community. Since the Civil Right's Act of 1968, there have been protected classes both by Federal and by State definition. At a minimum, the Federal protected classes must be honored in your state. If the state in which you do business has additional protected classes, these also must be added to the list of protected classes that cannot be discriminated against.

#### **FEDERALLY PROTECTED CLASSES DEFINED**

<b>Protected Classes</b>	<b>Description</b>
<b>Race</b>	Generally, a member of a group united or classified together based on a common history, nationality or geography.
<b>Color</b>	The color of a person's skin.
<b>Family Status</b>	A household with minor children. A person who is pregnant or seeking custody of a child, or is planning adoption or guardianship is included
<b>Handicapped/Disability</b>	Having a physical or mental impairment that substantially limits one or more major life activities, or having a record of, or being perceived as having a disability.
<b>Sex</b>	Being male or female.
<b>National Origin</b>	Generally, a member of a nation by birth or naturalization or having common origins or traditions.
<b>Religion/Creed</b>	Sincerely held religious, moral or ethical beliefs and practices.

Listed below are the protected classes for the State of Illinois, Iowa and Wisconsin:

Protected Class	Illinois	Iowa	Wisconsin
Race	√	√	√
Color	√	√	√
Religion/Creed	√	√	√
Sex	√	√	√
Handicap/Disability	√	√	√
Familial/Family Status	√	√	√
National Origin/Ancestry	√	√	√
Marital Status	√		√
Sexual Orientation		√	√
Lawful Source of Income			√
Age			√
Unfavorable Discharge from the Military	√		
Military Status	√		
Gender Identity		√	
Retaliation		√	

States, counties and local municipalities may develop their own fair housing ordinances, which may be defined differently in each state, county or municipality, so it is important to become familiar with the local fair housing ordinances affecting your area. These ordinances tend to offer broader protections and may have more protected classes than federal or state law.

Until 1988, the Federal Fair Housing Law carried only minimal consequences to apartment communities that discriminated in housing. In 1988, however, some very significant changes were made in the Federal Fair Housing Law through the Fair Housing Amendment of 1988. Essentially, two federally protected classes were added in 1988, those being **families** and **the physically and mentally challenged**. Not only did the list of protected classes grow, but also the penalties for discriminating against these classes were also increased substantially.

In the past, the person who was discriminated against would have to bring a charge against the party accused of discrimination in a civil court proceeding. This is no longer necessary. HUD and State Fair Housing Agencies have the right to file a discrimination complaint and to mediate these discrimination complaints without going through civil proceedings. Not only are the penalties much greater (\$10,000 - \$100,000 +), the possibility of having a discrimination suit filed against a property has also increased. Therefore, ACC has established clear guidelines for you to use to avoid discrimination on your rental property.

The Equal Housing Opportunity Agreement Form **[ACC-FH-205]** must be signed by **ALL** staff members associated with the apartment community and goes in their personnel file.

This form expresses each of ACC's employees' intent to not discriminate. Its purpose is to reduce any liability that the ACC would face should an employee choose to or inadvertently discriminate. It sets forth ACC's standards and clarifies the management company's position toward discrimination. This is an important tool for the management company to have in place should a discrimination suit be filed. Whenever there is a discrimination suit, both the individual accused of discrimination and the management company may be held liable.

The safest approach to Fair Housing is to treat everyone equally and to implement all policies consistently. If you apply company policies consistently and treat all parties equally, you will better protect yourself and ACC from a discrimination suit. You are never completely safeguarded from a discrimination complaint, because at any time an individual who chooses to do so may file a complaint. However, you will have resources available to dispute the complaint if you have consistently applied company policies and treated all parties fairly.

EACH NEW EMPLOYEE **MUST** VIEW THE IREM "FAIR HOUSING IN THE 90'S" VIDEO AND SATISFACTORILY PASS THE QUIZ BEFORE COMPLETING THEIR ORIENTATION.

In order to assure conformance to this requirement, ACC has implemented the use of the "Rental Board and Weekly Traffic Report" [ACC-M-305]. All ACC properties are required to list **each** call and **each** visit on this form so that there are consistent records in the event of a discrimination complaint. This form also helps you and your staff to ask the appropriate qualifying questions to each prospect so that you can market your property more effectively. The Weekly Traffic Report is required to be submitted weekly with all other reports. This worksheet will be discussed in Section III in more detail.

<b>FAIR HOUSING DO'S AND DON'TS (Include but are not limited to)</b>
Treat all residents and prospects equally. Always quote the same rental rates. Offer the same concessions to all prospective renters. Disclose unit availability consistently. List all calls and visits on the required ACC form. Do not steer prospects to a particular unit, building, or location within the property. Offer property tours (model, common areas, etc.) consistently to all prospects. As much as possible, spend equal time with and give the same information to each prospect. Provide prompt and courteous maintenance service to all residents. Enforce all ACC policies, procedures, and regulations consistently.

One question that commonly occurs when discussing Fair Housing is, "Do you mean I have to rent to these protected classes even if I think they will not make good residents?" *The answer is "it depends"*. These laws are created to protect certain parties from being discriminated against solely because they are in a certain class of people. For instance, if you decide not to rent to a minority, the question may become "why"? Did you not rent to the minority because you wanted an all-white resident population? If so, then you discriminated. If you did not rent to a minority person because of poor credit, a bad landlord reference, or insufficient income to qualify to live on your property, then you have not discriminated as long as you use the same qualifying criteria for all prospects. Qualifying criteria are discussed in more detail in Section V. You may be accused of discrimination, but your records should clearly show why you refused to rent the apartment and that should substantiate any counter claim you must make. Whenever you are unclear about whether or not to rent to someone, consult your Supervisor.

We have attempted here to touch on the highlights of the program so that you have a working knowledge from which to begin leasing and management of your community. If you remember to treat everyone fairly and offer everyone the same rental rates and concessions; if you do not attempt to steer individuals to a certain apartment; and if you consistently disclose what units you have available at a particular time; you are well protected within the law. The grounds on which you may accept or reject an application are discussed later in this manual with ACC leasing guidelines. These guidelines should be the only criteria upon which a leasing decision is made.

## B. IT REALLY HAPPENED!

The following situation occurred in the Washington D.C. area and resulted in a penalty of \$2.4 million to the Owner of the property!

P.S. The party required to pay the \$2.4 million was the management company!

A mother of two young children inquired about an apartment for rent. The Resident Manager told the woman that the rental community was "**all adult**" and that no children were allowed.

The would-be renter complained to a local Fair Housing group who sent a tester to investigate. The same thing occurred to the tester. The Resident Manager told the tester that the rental community did not allow children.

The would-be renter and the Fair Housing group filed a lawsuit against the management company for discrimination against families with children.

During the investigation, the attorneys were permitted to go through rental applications held by the management company's properties for the past year. The attorney saw comments handwritten on the application that repeatedly denied rentals because of the fact that the applicant has children.

The attorneys were able to convince the jury that the management company had by "**pattern and practice**" been refusing to rent to families, which was a violation of the Fair Housing Law. The jury awarded the rejected applicant \$2,000.00 for her out-of-pocket losses, and \$413,000.00 to the Fair Housing group so that they could test all of that management company's properties in the future. Finally, it ordered the management company to pay \$2 million to the applicant and the Fair Housing group for punitive damages.

Needless to say, the management company is appealing.

Karen Barr, Esq. Wilmer, Cutler and Pickering, 2445 "M" St., NW, Washington, DC 20037

## C. ADVERTISING AND FAIR HOUSING

Fair Housing Law does not allow discrimination against protected classes in your advertising. The use of people in display advertising and in ACC brochures is prohibited. In addition, many words or references to certain geographical locations (such as "near St. Michael's Cathedral") are prohibited.

HUD regulations provide that all advertising, whether visual or auditory, for the sale, rental or financing of housing should contain the Equal Housing Opportunity logo, statement or slogan. This is not limited to newspaper advertisements, but applies to all written, radio, television and video advertising also. It should appear in bold and be clearly visible.

In order to protect your property from advertising discrimination, **THE ACC MARKETING DEPARTMENT AND/OR YOUR SUPERVISOR MUST APPROVE ALL ADVERTISEMENTS BEFORE THEY ARE PLACED.**

## D. OCCUPANCY GUIDELINES

ACC maintains a general occupancy guideline of two persons per bedroom. However, each ACC property is required by law to have specific occupancy guidelines. These occupancy guidelines are dictated by the appropriate local municipality. Each Regional Manager will retain a copy of local occupancy codes from each municipality in which they oversee a property. Regional Managers will monitor these restrictions and advise Community Managers if there is any deviation from the ACC policy of two persons per bedroom.

These guidelines must be strictly adhered to. **NO EXCEPTIONS are permitted.**

## E. SPECIAL CONSIDERATIONS FOR FAIR HOUSING

### 1. ADA COMPLIANCE

The Americans with Disabilities Act requires common, public areas to be accessible to handicapped individuals. This means that access to the building(s), hallways, the rental office, and other areas that are open to the general public must be handicap-accessible. This compliance is required on all properties unless financial or architectural hardships make this impossible. If any of your common areas are not easily accessible to the handicapped, harsh penalties can be incurred. Please bring any such restricted areas to the attention of your Supervisor so that reasonable alterations can be made to conform to these requirements.

**TDD phone numbers are required for all government-assisted properties.**

### 2. ALTERATIONS FOR THE PHYSICALLY AND MENTALLY CHALLENGED

The 1988 Federal Fair Housing Amendment requires property owners to be flexible in providing alterations in apartments for the physically challenged. In general, these guidelines state that

**reasonable** alterations may be made by such an individual with the Owner's consent, as long as the occupant is willing to pay for the alteration. Additionally, the law provides that the landlord may escrow an amount equal to the cost to return the apartment to pre-altered conditions. This is designed to assure that the alteration can be restored after the physically challenged occupant moves out. Consult your Supervisor if you have questions regarding these types of requests.

Most requests are specific to that occupant's lease term only. Some alterations, however, will be permanent in nature. **These must always be Supervisor approved and Owner approved.** Property Owners are not required to accept permanent unit alterations for handicapped persons. However, property Owners may be willing to accept the alteration and therefore, should be consulted prior to approving or disallowing such an alteration.

NOTE: Special consideration will be required for hearing-impaired households. Emergency systems, which are sound orientated, will need to be modified in these units. Please contact your Supervisor if this situation arises.

**Section 8 properties must make special accommodations in addition to those described above. Please consult the appropriate Handbook for additional information.**

# MEMORANDUM OF UNDERSTANDING BETWEEN NORTHPOINTE DEVELOPMENT II CORPORATION AND MIDDLETON OUTREACH MINISTRY, INC.

This MEMORANDUM OF UNDERSTANDING (this "MOU") is hereby made and entered into by and between Middleton Outreach Ministry, Inc. (hereinafter "Service Provider") and Northpointe Development II Corporation (hereinafter "Developer").

## I) PURPOSE:

The purpose of this MOU is to develop a framework of cooperation between Service Provider and Developer that will lead to the development and operation of a 60-unit multifamily development on a parcel located at 7601 Mineral Point Road, Madison, Wisconsin (the "Project"). The Developer will construct the Project, which will be financed in part by low-income housing tax credits allocated by Wisconsin Housing and Economic Development Authority and by a loan made available through the City of Madison Affordable Housing Fund. All 60 units will be deemed affordable and rent restricted to households earning 30-80% of the County's Median Income for a period of 40 years. 12 units, including six one-bedrooms, 4 two-bedrooms, and 2 three-bedrooms will be set aside for households, including Veterans, at 30% of County Median Income and who are currently homeless, formally homeless, or at risk of being homeless. Service provider agrees to provide and/ or coordinate services needed by the tenants of the set aside units at the project.

## II) STATEMENT OF MUTUAL BENEFIT AND INTERESTS

Service Provider represents and warrants that the service coordination described in this MOU conforms with their organization's mission and purpose and that the level of service coordination they intend to provide is adequate for the number of supportive housing units and targeted population. Service Provider is a local member of the Homeless Services Consortium. The proposed project is located within the Service Provider's area of focus.

Developer represents and warrants that Service Provider's participation in this transaction will benefit the Project and allow tenants to maintain housing.

## III) STATEMENT OF OBLIGATIONS

### A) Service Provider:

A designated Service Coordinator will be responsible for linking the target population at the site with supportive, medical, or advocacy services in the general community for which they are entitled, with a desired outcome of keeping them

independent in their units. Specific services to be offered under this agreement include:

- 1) Completion of an intake assessment to identify strengths as well as areas of need for individuals and families. The Service Coordinator will make reasonable effort to engage residents in this process. It is understood and agreed that the resident has to voluntarily agree to participate in the process.
- 2) Development of a case management plan for residents completing the intake assessment. This plan may include referral to other resources, including services and resources specific to their needs. This will include linking residents with agencies that support independence and self-sufficiency, access to benefits, employment opportunities and financial assistance and management.
- 3) Assisting property management staff in referrals and housing families selected from the applicable Community-Wide Priority List and providing case management services if the tenant is eligible and Service Provider has capacity.
  - (a) Service Provider currently has the capacity, and developer is targeting, to provide case management services to a maximum of 2-4 households from the priority list at the property. The Service Provider may include referral to other resources, as the tenants will have a choice in the provider
- 4) Assisting property management staff in referrals and housing formally homeless families that do not require intensive services
- 5) Provide on-site services on as needed basis for the residents of the property. The frequency of services as follows:
  - (a) On-site services
    - (i) Monthly during a three month initial lease up phase of the project.
    - (ii) Quarterly after the lease up phase through the remainder of the 15 year tax credit compliance period.

**B) DEVELOPER:**

- 1) Work with property management to create a Tenant Selection Plan and preferences that target Individuals and/ or families experiencing homelessness, formally homeless families, and Veterans who are homeless or at risk of being homeless.
- 2) Provide a space at the property for Service Provider to meet with tenants.
- 3) Notify Service Provider of vacancies for supportive units, some of which may include a veteran's preference, for referral opportunities.
- 4) Coordinate with a Veteran Specific Support Service Provider, additionally, for referrals when vacancies occur in the Veterans supportive units.
- 5) Developer to pay Service provider \$5,000 annually with the first payment occurring when the project receives its occupancy permit from the City. Payments will continue every 12 months from date of initial occupancy until the projects 15-year tax credit compliance period has expired.

- 6) Work with Service Provider and property management to leverage additional non-City funded supportive service dollars.

**IT IS MUTUALLY UNDERSTOOD AND AGREED BY AND BETWEEN THE PARTIES THAT:**

MODIFICATION. Modifications within the scope of the instrument shall be made by mutual consent of the parties, by the issuance of a written modification, signed and dated by all parties, prior to any changes being performed.

PARTICIPATION IN SIMILAR ACTIVITIES. This instrument in no way restricts Service Provider or Developer from participating in similar activities with other public or private agencies, organizations, and individuals. However, both parties to this agreement acknowledge a desire to maintain strong working relationships in the future, to consider future partnership opportunities, and to discuss partnership opportunities that they believe may be of interest to the other party.

PRINCIPAL CONTACTS. The principal contacts for this instrument are:

**SERVICE PROVIDER**

Ellen Carlson  
Executive Director  
Phone: 608-826-3417  
Email: ellen@momhelps.org

**DEVELOPER**

Sean O'Brien  
Principal  
Phone: 608-334-5665  
Email: sean@northpointedev.com

IN WITNESS WHEREOF, the parties hereto have executed this MOU as of the first date set forth above.

Middleton Outreach Ministry, Inc.

Northpointe Development II Corporation



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Ellen Carlson,  
Executive Director



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Sean O'Brien,  
Principal



## **RESIDENT SELECTION CRITERIA**

### **Section 42 Properties – Effective 02/01/2020**

The resident selection criteria are used by ACC Management Group, Inc. (ACC) and the sites managed by ACC to uniformly evaluate all potential residents and to help protect the safety, health, and welfare of all other Residents. All adult occupants must complete a separate application and comply with the following criteria.

#### **The Application Process**

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1. All rental applications must be in writing and should be completed in the rental office.
2. Falsification on an application is a basis for automatic denial.
3. Applications are processed based on the time and date the application is received.
4. All adult applicants including co-signers must pay a non-refundable \$15.00 processing fee. The application will not be taken or processed prior to receipt of the processing fee from all adult applicants. All applicants must sign the “Application Processing Fee Agreement” form and pay the \$15 Processing Fee made payable to the community.
5. All adult applicants must provide a Government issued proof of ID and Social Security number.
6. All adult applicants must pass our resident selection criteria based on landlord references, credit report and criminal background check including State and Federal sex offender registries and household income. If any of the household members do not pass, then the entire household will be denied. If denied, any applicant would be eligible for reconsideration 60 days from original denial date.
7. ACC Management Group, Inc. reserves the right to reject an application for any negative references according to ACC’s resident selection criteria.
8. If any applicant is in the process of a court eviction or is contesting a court eviction, the application will be held in abeyance until the final court disposition.
9. If any applicant has an eviction in the last 3 years, the application will automatically be denied.
10. If any applicant owes a landlord money the application will be automatically denied unless proof is provided money owed is not for damages and the account has been paid in full. A security deposit of 1.5 times the monthly rent will be required prior to move in.
11. If any applicant has 1 stipulated dismissal/court ordered payment plan within the last 3 years, applicant will need to show proof of all terms being met and a security deposit equal to 1.5 times the monthly rent would be required. If any applicant has more than 1 stipulated dismissal/court ordered payment plan in the last 3 years, application would automatically be denied.
12. A community manager will deny no applicant. All applications are reviewed by ACC Management Group, Inc. compliance department.
13. The security deposit must be paid in full before applicant is given keys to the apartment. – **No exceptions.**

#### **Income**

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14. The applicant’s household monthly gross income must be equal to or greater than one and a half (1.5) times the monthly rent.
-

## **Credit Reports & Co-signer Requirements**

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15. All applications are evaluated based on a credit scoring system. Credit scoring is based on real data and statistics and treats all applicants objectively.
16. If collection accounts are listed on your credit report, collections that are paid in full or otherwise closed will not be counted. Medical collections and student loans will not be counted. All other collections will be counted and used to determine selection.
17. If the total amount of collections for the entire household exceeds \$3,000, the applicants will be required to obtain one approved co-signer; or other approved method (\*see below) for the household in lieu of a co-signer. If the total amount of collections for the entire household exceeds \$6,000 the application will be denied.
18. All applicants without a credit report are required to obtain one approved co-signer or other approved method (\*see below) for the household in lieu of a co-signer.
19. All applicants must provide proof that any Resident paid utilities do not have outstanding balances that would prohibit them from transferring utilities into the Residents name.
20. All first-time renters or applicants without a two-year rental history are required to obtain one approved co-signer or other approved method (\*see below) for the household in lieu of a co-signer.
21. All cosigners are required to meet the credit terms of the resident selection criteria and monthly gross income must be equal to three times the monthly rent. Only one co-signer is needed per household and will have liability for the entire household.
22. If an applicant's credit report shows an open bankruptcy the application will be held in abeyance until proof of dismissal is provided; dismissed bankruptcies are not considered in determining resident approval.

\*other approved methods in lieu of a co-signer: a) security deposit of 1.5 times the monthly rent prior to final file approval; OR b) the rent must be paid under contract by a sponsor or housing authority; OR c) proof of ability to pay based on two years of rental history paying a comparable rent amount, OR other approved method.

## **Criminal Report**

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23. If you have been convicted of manufacturing or distributing a controlled substance as defined in Section 102 of the Controlled Substances Act, your application will be denied.
24. If you have been convicted of any other crime that shows a demonstrable risk to resident safety and/or property, your application may be denied after consideration of the nature and severity of the crime and the amount of time that has passed since the criminal conduct occurred. Additional factors may also be considered on a case-by-case basis.
25. Arrest records, without subsequent conviction, will not be considered.
26. Along with your application you may provide any mitigating information or documentation that you would like to have considered regarding any prior conviction.
27. Registration on the state or Federal Sex Offenders Registry will be a basis for denial of your application.
28. Criminal history and the Sex Offenders Registries will be checked annually in advance of lease renewal, and if any member of the household no longer meets the criteria in #22 through #26 above, that household member will be required to vacate the unit or household's lease will not be renewed.

## **IRS Section 42 Program Guidelines – (Co-signers excluded)**

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29. All applicants applying for a Section 42 apartment must adhere to IRS Section 42 LIHTC income limits to be accepted. Note: We will only allow an employer to fill out an Employment Verification two (2) times. When filling out the Section 42 application, if you do not understand a question, please ask the community manager for assistance before answering the question.
30. Adherence to the Section 42 incomes limits does not guarantee that the available unit will be made available to the first household who qualifies. Under the Section 42 code, some sites have specific income limits at different percentages of County Median Income (CMI). The first household who qualifies for the unit with a lower CMI income limit will be offered said unit.

- 31. **The household must be income qualified on the day of move-in. If any circumstances change between the original application, prior to or after move-in, the applicant must notify the management office immediately as qualification to the Section 42 income limits may be affected. \_\_\_\_\_ (please initial)**
- 32. If the household is entirely comprised of full-time students, they must meet one of the student eligibility factors.

**Occupancy Issues**

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- 33. Maximum occupancy limits are two persons per bedroom unless otherwise specified by local ordinance. For the purpose of occupancy limits, all household members will be counted.
- 34. For Section 42 income limit calculations, an unborn child or children are counted as household members.
- 35. Age restrictions will apply at senior properties. Verification of age is required per #5 listed above. Ask the community manager for details.

ACC Management Group, Inc. adheres to all Federal, State and Local Fair Housing Laws and provides ongoing training for onsite and corporate staff.

If you any concerns about these criteria, please contact: ACC Management Group, Inc., Compliance Manager, 2375 State Road 44, Suite A, Oshkosh, WI 54904.

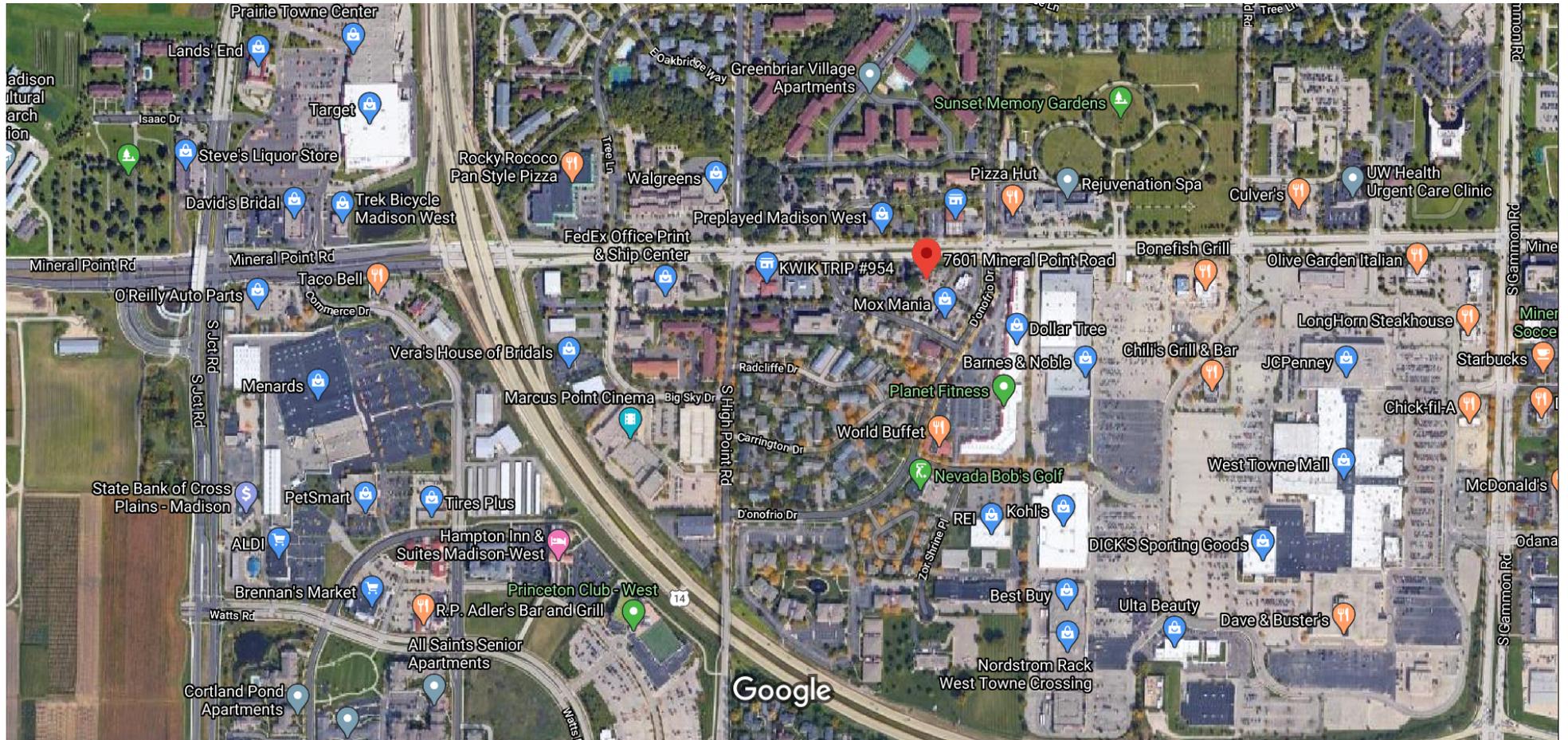
**Applicant Acknowledgement**

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I have received, read, understand and agree to the above resident selection criteria.

Applicant Signature	Printed Name	Date
Applicant Signature	Printed Name	Date
Applicant Signature	Printed Name	Date
Applicant Signature	Printed Name	Date
Community Manager Signature	Printed Name	Date

# Google Maps 7601 Mineral Point Rd

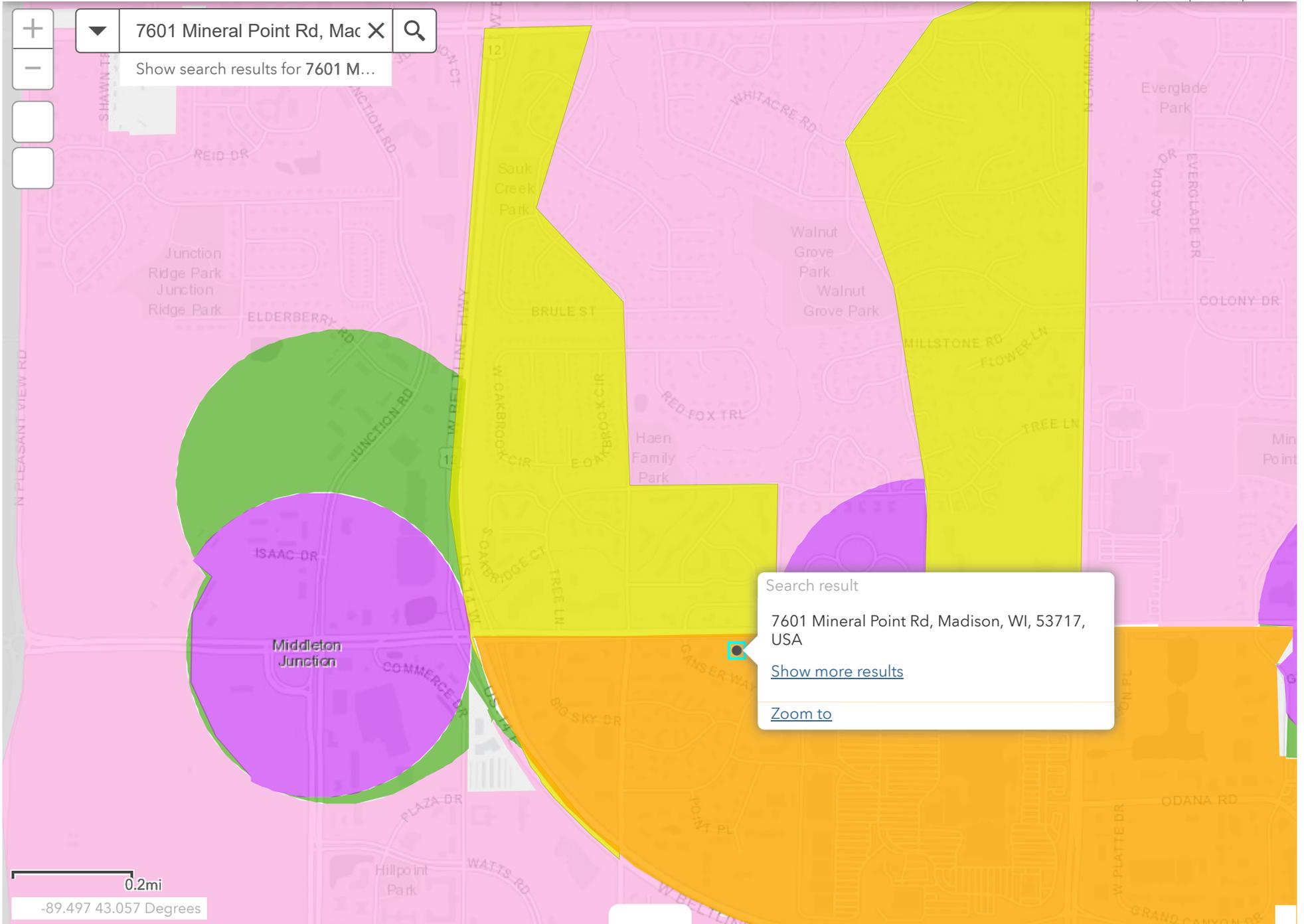


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# 2020 Affordable Housing Targeted Areas

City of Madison Open D





**knothe • bruce**  
ARCHITECTS

Phone: 7601 University Ave., Ste 201  
608.836.3690 Middleton, WI 53562

ISSUED  
Issued for Review - July 9, 2020

PROJECT TITLE  
**PIZZERIA UNO**  
Site Redevelopment

7601 Mineral Point Rd  
SHEET TITLE  
**Site & Basement**  
Floor Plans

SHEET NUMBER

**A-1.1**

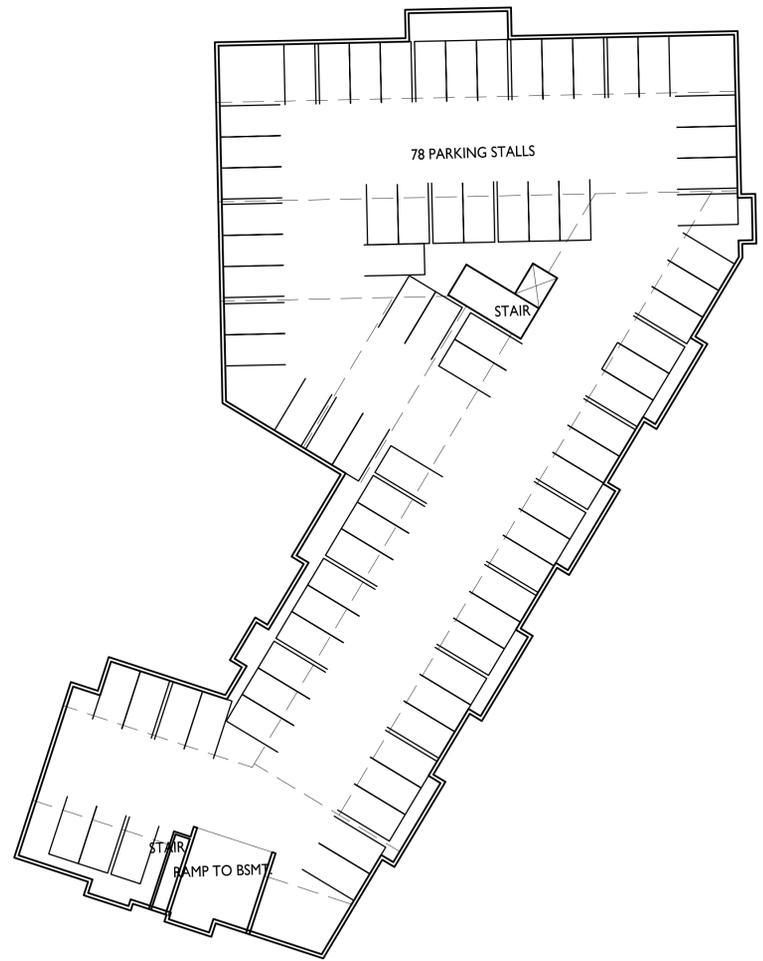
PROJECT NO. **0000**

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MINERAL POINT ROAD

D'ONOFRIO DR.

GANSER WAY

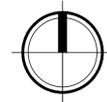


**2** BASEMENT PARKING PLAN  
A-1.1 1" = 20'-0"



UNIT MIX:	
ONE BED	- 23
TWO BED	- 21
THREE BED	- 6
THREE BED T.H.	- 10
	60

**1** SITE / FIRST FLOOR PLAN  
A-1.1 1" = 20'-0"





**knothe • bruce**  
ARCHITECTS

Phone: 7601 University Ave., Ste 201  
608.836.3690 Middleton, WI 53562

ISSUED  
Issued for Review - July 9, 2020

PROJECT TITLE  
**PIZZERIA UNO**  
Site Redevelopment

7601 Mineral Point Rd  
SHEET TITLE  
**Second - Fourth**  
Floor Plans

SHEET NUMBER

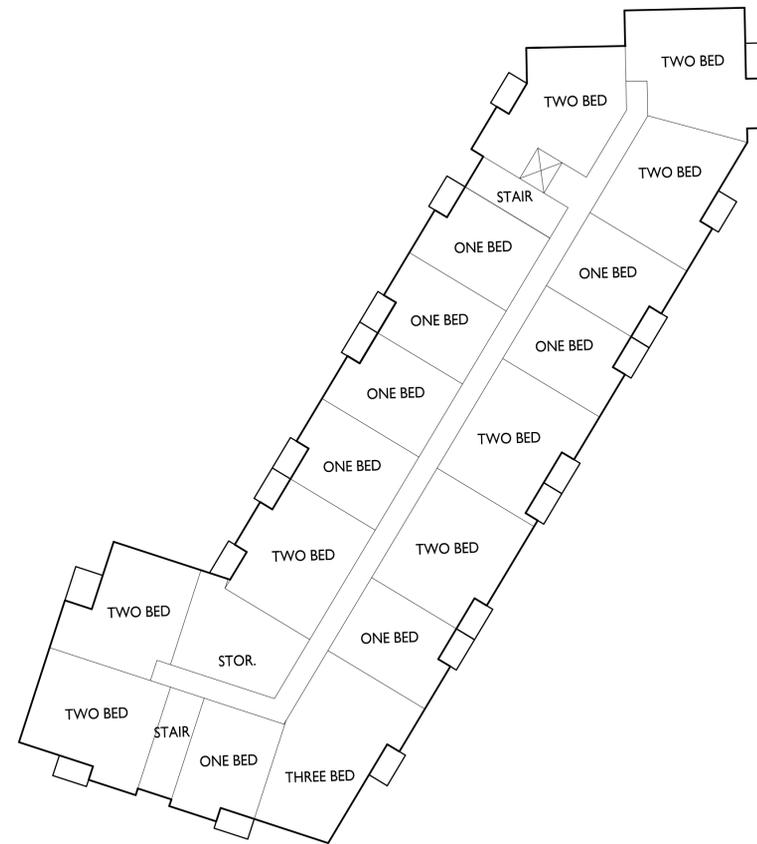
**A-1.2**

PROJECT NO. **0000**

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**1** SECOND FLOOR PLAN  
A-1.2 1" = 20'-0"



**2** THIRD & FOURTH FLOOR PLAN  
A-1.2 1" = 20'-0"



## Sean O'brien

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**From:** cnc@twgi.com on behalf of New Construction <cnc@twgi.com>  
**Sent:** Sunday, July 12, 2020 11:18 AM  
**To:** Sean O'brien; Sean O'brien  
**Subject:** Welcome to New Construction (FOE-385FE-18160)

## Thank You

A notification of this application has been submitted for further review.

Application Number: [FOE-385FE-18160](#)  
Program: **New Construction**  
Sponsor: **Focus on Energy**  
Created By: **Sean O'Brien on 7/12/2020 11:18:25 AM**  
Project Name: **Uno's- Madison**  
Project Location: **7601 Mineral Point Road  
Madison, WI 53717**  
Business Customer: **Northpointe Development**

Your unique application number is listed below. You can make additional modifications to this application at any time by clicking this number. Please distribute this email to other contacts as necessary so that they can fill out additional information on this application.

**[FOE-385FE-18160](#)**

## Sean O'brien

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**From:** Tucker, Matthew <MTucker@cityofmadison.com>  
**Sent:** Wednesday, July 8, 2020 10:57 AM  
**To:** Sean O'brien  
**Subject:** RE: Zoning Status and process- Affordable Housing Fund Application

Yes, the property is zoned PD Planned Development and will need a zoning map amendment to change the Planned Development.

---

**From:** Sean O'brien [mailto:sean@northpointedev.com]  
**Sent:** Wednesday, July 8, 2020 10:46 AM  
**To:** Tucker, Matthew <MTucker@cityofmadison.com>  
**Subject:** RE: Zoning Status and process- Affordable Housing Fund Application

Caution: This email was sent from an external source. Avoid unknown links and attachments.

Thanks Matt,

I believe I'm supposed to get written confirmation of zoning status and process from you. I've already been told the process to go from PD to PUD from Kevin but I want to make sure I'm doing all of the require steps for the application. Thanks for looking at my email while out of the office. Have a great day.

Sean O'Brien  
Northpointe Development  
2628 Saw Tooth Drive  
Fitchburg WI 53711  
608-334-5665



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**From:** Tucker, Matthew <MTucker@cityofmadison.com>  
**Sent:** Wednesday, July 8, 2020 10:40 AM  
**To:** Sean O'brien <sean@northpointedev.com>  
**Subject:** RE: Zoning Status and process- Affordable Housing Fund Application

No questions. Thanks for the description, Sean. Matt Tucker

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**From:** Sean O'brien [mailto:sean@northpointedev.com]  
**Sent:** Tuesday, July 7, 2020 9:50 PM  
**To:** Tucker, Matthew <MTucker@cityofmadison.com>  
**Subject:** Zoning Status and process- Affordable Housing Fund Application

Caution: This email was sent from an external source. Avoid unknown links and attachments.

Mr. Tucker,

We are working on a Affordable Housing Fund application for a project located at 7601 Mineral Point Road. We've met with Kevin and Julie to discuss the project and timeline for a zoning change but the application materials request that we reach out to you with certain information. The site was formally the home of a Pizzeria Uno's Restaurant. We intend to build a four-story building with 55-70 total units. The final number of units will be determined over the next few days. The former restaurant is a converted farm house from the 1800s (I've been told the date but haven't confirmed). In preliminary talks with the city and alderperson, it has been suggested that we attempt to incorporate the farm house into our development. We do intend to keep the farmhouse, although we plan to move the historic portion of the building towards Mineral Point. This section may be used as commercial space or other amenity space for the development. The non-historic portions of the building will be demolished. The historic portion of the farm house is approx. 1900-2400 square feet depending on the future use. Please let me know if you have any questions. Thanks much.

Sean O'Brien  
Northpointe Development  
2628 Saw Tooth Drive  
Fitchburg WI 53711  
608-334-5665



# Northpointe Development Uno-Madison

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Response Submission Due Date: August 19, 2020 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 and Community Engagement**

- 1. Provide an overview of the feedback and comments that you received from your neighborhood meeting.** Northpointe held a neighborhood meeting on Aug 5<sup>th</sup>. We sent out over 1200 postcards and personally invited the Tamarack Trails HA. There were very few comments regarding our proposal. Attendees were please to see that our plans incorporated the Historic Farmhouse. There was some additional discussion on workforce housing and issues that neighbors are experiencing with other housing developments nearby. This led the discussion to our ownership reputation as well as our process for hiring a professional third-party management company. The meeting lasted for less than an hour. We have received very positive feedback from neighboring office building owners via calls and email. They had a few questions about how we determined the size of the building and parking availability. We believe that we have thoroughly followed up with all interested neighbors.

### **Energy Efficiency**

- 1. The City expects awarded applicants to continue working with Focus on Energy throughout the building design process. This begins with completing the Building Analysis Summary Report and providing an update as to the recommended strategies most likely to be fully implemented in this project ASAP/by approximately September 15, 2020. Please provide a progress report on the status of this project's FOE Energy Design Assistance Building Analysis. By what date would you anticipate that it would be feasible to provide the Energy Design Assistance staff team with the requested information needed to complete the Building Analysis Summary Report?** We have been in contact with FOE and have provided them with supplemental information regarding our plans and timeline. We expect to set up an interview in the next week so that FOE can start and complete their report.

### **Renewable Energy**

- 1. Please describe your Renewable Energy systems that will be incorporated into the proposed project (solar photovoltaics (PV), solar thermal, biogas, biomass and wind).** As stated in the application we intend to incorporate solar PV into the project and have

contacted Full Spectrum for feedback on size and cost of a system intended to cover 90% of the common area energy usage.

2. **What is the status of application(s) to Focus on Energy's Renewable Energy team, MadiSUN, and/or other applicable agency providing incentives to implement renewable energy systems?** We are working with MadiSUN and will be getting a formal bid from Full Spectrum and possibly another vender so that we can apply for a grant through MadiSUN. Full Spectrum has experience in working with FOE Renewable Energy team and we will be getting that application process started in the next week as well.

### Sustainable Building Design Elements

1. **Please describe the Sustainable Building Design Elements and strategies that will be incorporated into the proposed project as referenced in the [AIA Framework for Design Excellence](#).** Relevant elements and strategies include, but are not limited to: **Please know that additional Design elements may be added once we have received the Summary Report from FOE.**
  - a. **Design for equitable communities** – The project is an infill site on a major thoroughfare and will be unique as we are saving and reusing the historic farmhouse. The site is very walkability to amenities, jobs, public transportation, bike paths. We will incorporate both indoor and outdoor play areas into our plan and all units will have walkout access or balconies. The parking will be mostly hidden underground where we will also have bike parking. Additional bike parking will be provided outside of the building. Finally, heat will be included with the rent as an added benefit to the tenants.
  - b. **Optimize energy use** The project will have energy efficient window systems, meet or exceed energy code, score 200 or more points on Wisconsin Green Built Standards, and HVAC systems highly efficient
  - c. **Protect and conserve water** we will install low flow faucets, toilets, energy efficient appliances, and water heaters with re-circulation water lines.
  - d. **Optimize building space and material use** Locally sourced masonry- materials utilizing recycled materials where possible.
  - e. **Enhance indoor environmental quality (IEQ)** The building will have generous windows, air purification filters, and operable sashes on windows for fresh air.
  - f. **Optimize operational and maintenance practices.** Lights on timers, occupancy sensors in common areas,

### Social and Racial Equity

1. **Please provide an update on the status of Northpointe's possible partnership with an emerging developer.** Discussions are on-going with a specific possible partner. We should know more and will share at our staff interview. One of the challenges both parties are facing is lack of clarification from WHEDA regarding the newly issued QAP.
2. **Besides having a 24% ownership interest in the managing member, will the emerging developer have a statutory Right of First Refusal or General Partner Purchase Option?**

The co-developer will not have a right of first refusal or general partner purchase option. The partnership is intended to grow the experience and capacity of the co-developer, for which we will expect that the co-developer materially participate all phases of the development.

3. **Please respond to the spirit of Question 62, e.g., based on the three principals of Northpointe Development Corporation II, as listed in the Organizational Chart. Of the Principles of Northpointe: 0% are women or persons of color.**

#### **Tenant Selection and Affirmative Marketing**

1. **Standard Affirmative Marketing practices appear to be ineffective in reaching Asian and Latinx renters. Please elaborate on the approach that ACC will use to affirmatively market and provide outreach to prospective Asian and Latinx applicants. ACC will work with Latinx and Asian organizations listed below as well as our Service Coordinator the Middleton Outreach Ministry and Joining Forces for Families. ACC will:**
  - Provide marketing flyers about the apartments to various members of the referral groups, we will ensure that their clients have access to written information about this housing opportunity.
  - Reach out and meet directly with staff of the various contracted and member agencies associated with these partners, we will ensure that they are aware of this housing opportunity for their clients and members.
  - Stay in regular contact with the entities listed below as well as their respective networks of services providing agencies to receive referrals of households who may wish to live in the Apartments.

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

2. **ACC's security deposit policy is inconsistent with the City's Tenant Selection Plan Best Practices (see RFP), especially regarding security deposits. These are based on the practices typically seen in Madison's affordable housing market. Will ACC adjust this policy accordingly? ACC will adjust their security deposit policy to meet the City's best practices. A maximum security deposit equal to one-half month's rent, as a standard; · For tenants with conditional credit, limited rental histories, or other limiting factors: a security deposit equal to one-half month's rent with a cosigner, or a deposit equal to one month's rent.**
3. **Does a tenant having a Housing Choice Voucher count as having a sponsor pay rent for the purposes of ACC's security deposit policy? No, a HCV only pays a portion of the rent. A sponsor covers the full amount of rent, so the HCV does not qualify.**

4. Please provide a list of racially- and ethnically-focused local organizations to which ACC will market available units (e.g. Centro Hispano, Urban League of Greater Madison, etc.). Management will reach to and work with the following local organizations and groups, amongst others, to market available units: Latino Academy of Workforce Development, Latino consortium for Action, Lasup- Latino Support Network of Dane County, Hmong Madison.com, Madison Area Chinese Community Organization, Central Hispano, Urban League, Joining Forces for Families, Freedom-Inc

#### Unit Mix

1. What utility allowance assumptions is Northpointe using for the one-, two-, and three-bedroom units? \$53, \$67, \$95 respectively for the one-, two, and three-bedroom units. The owner will be paying for Heat, Hot Water, Water & Sewer. Gas will be provided to the building through a general house meter.

#### Financials

1. Is Northpointe claiming the historic farmhouse in eligible basis for 4% acquisition credits? We will be claiming 4% acquisition credits which was not included in the original budget as we did not believe we were eligible. We are working with our Tax Consultant to verify how this will affect the budget.

#### Project Timeline

1. The timeline in Northpointe's application mentions that equity and debt financing will be complete before an application to WHEDA. Please confirm if this is accurate. If it is not, please submit a revised project timeline. Revised project timeline attached. There was an input error on the year for the equity line and a few others as well.
2. Is there an opportunity to apply for Historic Tax Credits for this project? We will continue to research this topic but in our experience the amount of credits available will not justify the transaction costs to obtain. WHEDA will also reduce the project's score by 4 points if the project is financed with historic equity no matter the size or proportion of the total budget. With that said, currently we do not intend to apply for historic credits.

#### Supportive Housing Units/Supportive Housing Partnerships

1. Besides having a 51% ownership interest in the managing member, will Middleton Outreach Ministry (MOM) have a controlling interest, statutory Right of First Refusal, or General Partner Purchase Option? We are still in very preliminary discussions with MOM to have ownership in the property. If we are unable to move forward, we will likely work with another non-profit. Northpointe will have control and right to buyout the investor.
2. Describe the consultation between Northpointe and MOM to determine the appropriate unit mix for supportive housing units. The unit mix follows income

averaging requirements as well as the request by the City for the supportive housing 30% CMI units to be spread evening among the bedroom sizes. MOM was approached by Northpointe to gauge interest in being a supportive services partner. Northpointe informed MOM that they were interested in providing affordable units and would take some households from the Coordinated Entry list

- 3. Is the development contemplating accepting both single individuals and families from the Continuum of Care Coordinated Entry List, or only families?** MOM and Northpointe determined that the goal of the project would be to house 2-4 households from the Coordinated Entry List, which is also the level of capacity MOM believed they had to offer to the project. Housing singles or families would be based on unit size availability, so either a single individual or family could be housed from the list.
  
- 4. If tenants are referred from Coordinated Entry what level of services will be provided (i.e. onsite, progressive engagement, etc). If not referred from Coordinated Entry what is the service plan?** Tenants from Coordinated Entry would be provided services based on their presenting level of need. MOM staff has the experience to provide on-site services in the rapid re-housing range (not a high level of intensity). The preference would be to use a progressive engagement approach to best meet the needs of the individual households. If tenants are not referred by Coordinate Entry and are in the designated units for supportive services, MOM would take the same approach and provide an initial needs assessment and proceed with a progressive engagement approach. Tenants will be connected to MOM services, as well as be referred to other community agencies.

**PROPOSAL TIMELINE**

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

<b>Activity/Benchmark</b>	<b>Estimated Month/Year of Completion</b>
Draft Site Plan Ready to Submit to Dev. Assistance Team (DAT) [ <i>Target/Actual Month/Date</i> ]	7/10/20
1 <sup>st</sup> Development Assistance Team/ Meeting (Due by 8/6/20) [ <i>Target/Actual Month/Date</i> ]	7/16/20
1 <sup>st</sup> Neighborhood Meeting (Due by 8/19/20) [ <i>Target Month/Date</i> ]	08/05/20
Submission of Land Use Application (Zoning Map Amendments Due by 9/16/20)	08/16/20
Submission of Land Use Application (Permissively Zoned Due by 10/7/20)	N/A
Plan Commission Consideration (If Rezoning, Due by 11/23/20 for 12/1/20 Common Council)	10/20
Urban Design Commission Consideration, if applicable [ <i>Target Month/Date</i> ]	10/20
Application to WHEDA	12/20
Complete Equity & Debt Financing	11/21
Acquisition/Real Estate Closing	12/21
Rehab or New Construction Bid Publishing	10/21
New Construction/Rehab Start	12/21
Begin Lease-Up/Marketing	2/22
New Construction/Rehab Completion	5/22
Certificates(s) of Occupancy Obtained	5/22
Complete Lease-Up	7/22
Request Final AHF Draw	7/22