



Westgate Commons
2020 CDBG Committee

Who We Are: JT Klein Company

- In November 2014, Jacob T. Klein formed JT Klein Company, Inc. with the ambition to develop affordable housing for Wisconsin's low-income families and seniors
- Over the past 16 years Jacob has been involved with the development and construction of affordable and market rate apartments, independent senior apartments, assisted living and memory care
- Jacob has developed over 1,350 units with project costs totaling over \$200,000,000. He has also served as construction project manager for over 600 of those units with construction contracts of exceeding \$60,000,000
- JT Klein Company was recognized in 2016 as one of the Top 50 affordable housing developers in the nation by Affordable Housing Finance Magazine

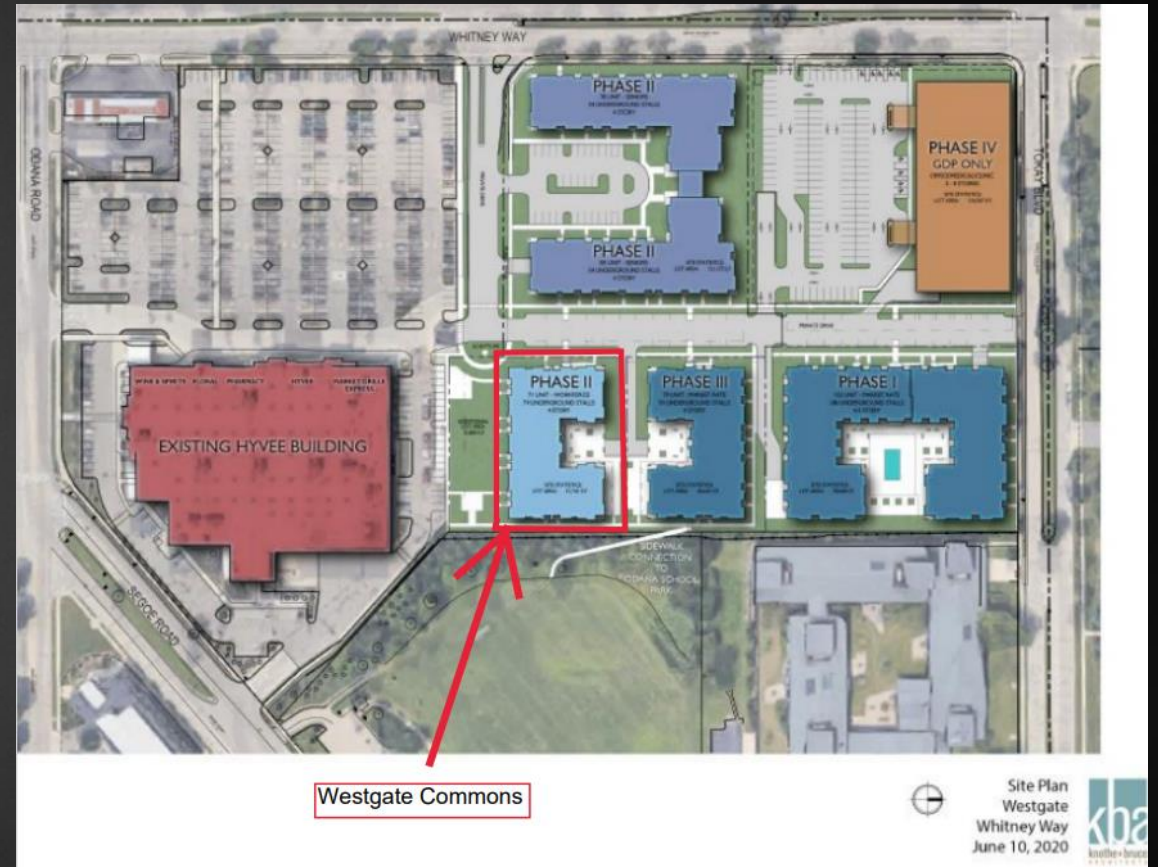


JT Klein Recent Successful Workforce Housing Developments

- Meadow Ridge Middleton- 95 Units Mixed Income Workforce Housing
 - Completed 2016
- 8Twenty Park (Madison)- 95 Units Mixed Income Workforce Housing
 - Completed 2018
- Oak Ridge Senior Apartments (Middleton)- 83 Senior Mixed Income
 - Completed 2019
- Stagecoach Trails (Middleton)- 46 Units WHEDA Bond Financed
 - Completed 2019

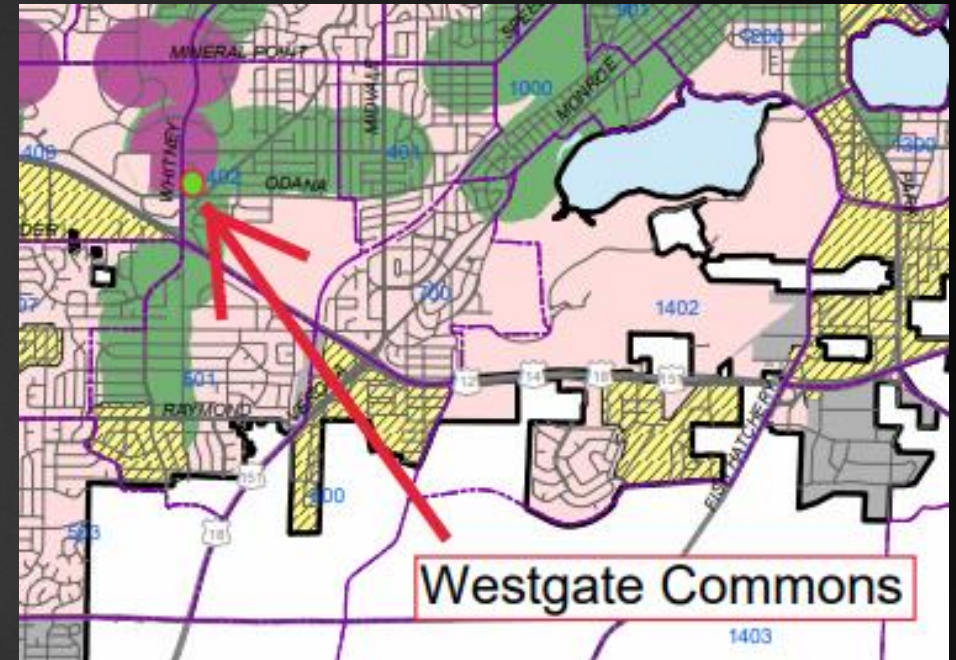
Westgate Commons Overview

- Part of the greater Westgate Redevelopment
- Application to WHEDA 9% Tax Credits
- 40 Year Rent Restricted LURA
- 72 Units
 - 44 1 bedrooms
 - 16 2 bedrooms
 - 14 3 bedrooms
- Affordability
 - 15 units @ 30% AMI
 - 25 units @ 50% AMI
 - 16 units @ 60% AMI
 - 15 market rate units
- 15 Supportive Service Units
 - Partnership with MOM & LSS



Westgate Commons Location

- Westgate Commons is an ideal location for affordable housing surrounded by nearby neighborhood amenities
- Less than 500 feet from the West Transfer Point and future BRT Stop
- Amenities within walking distance:
 - HyVee Grocery Store & Pharmacy
 - UW Research Park
 - YMCA West
 - Odana & Whitney retail center
 - UW Health Research Park Clinic
 - Public transportation (Bus lines 2, 6, 7, 18, 50, 51, 55, 59, 63, 67, 68, 78)
 - Odana School Park



Westgate Commons Unit Finishes

Westgate Commons will contain the same high level finishes and amenities found in a market rate project. Some of these features are

- Granite countertops
- Stainless steel appliances
- Full size in unit washer/dryer
- Luxury vinyl plank flooring
- Free high speed internet
- Onsite amenities
 - Community room
 - Workout Facility
 - Onsite Management & Maintenance
 - Controlled access and cameras
 - Storage lockers
 - Secured Childs Playground



Commitment to Renewable Energy

JT Klein is committed to having energy efficient developments that reduce their carbon footprint. Westgate Commons will have the following green measures:

- 30kw rooftop solar panel system
- LED lighting
- Energy Star Appliances
- High efficiency HVAC systems
- Low flow water valves
- Highly efficient building envelope
- Onsite electric vehicle charging stations
- 200+ points in Wisconsin Green Built Homes



Pictured: One of JT Klein's rooftop solar panel arrays

Partnership with Focus on Energy

- **JTK has partnered with FoE on all previous developments**
- **Westgate Commons as been assigned an FoE underwriter and was initially told to wait until the architectural design phase with contractors selected**
- **The Limestone Ridge project that is partnered with FoE will start construction this Fall. Limestone Ridge has already underwent the Building Analysis Summary Report and has preliminary energy strategies selected.**
- **JTK Plans to implement similar energy strategies at Westgate Commons such as:**
 - 5% improved cooling efficiency (units, corridor, & amenity)
 - 82% efficient gas furnace (units, corridor, & amenity)
 - Wall R 20 insulation
 - Occupancy sensors in storage & amenity areas
 - LED lighting throughout the entire development
 - 95% service water heating



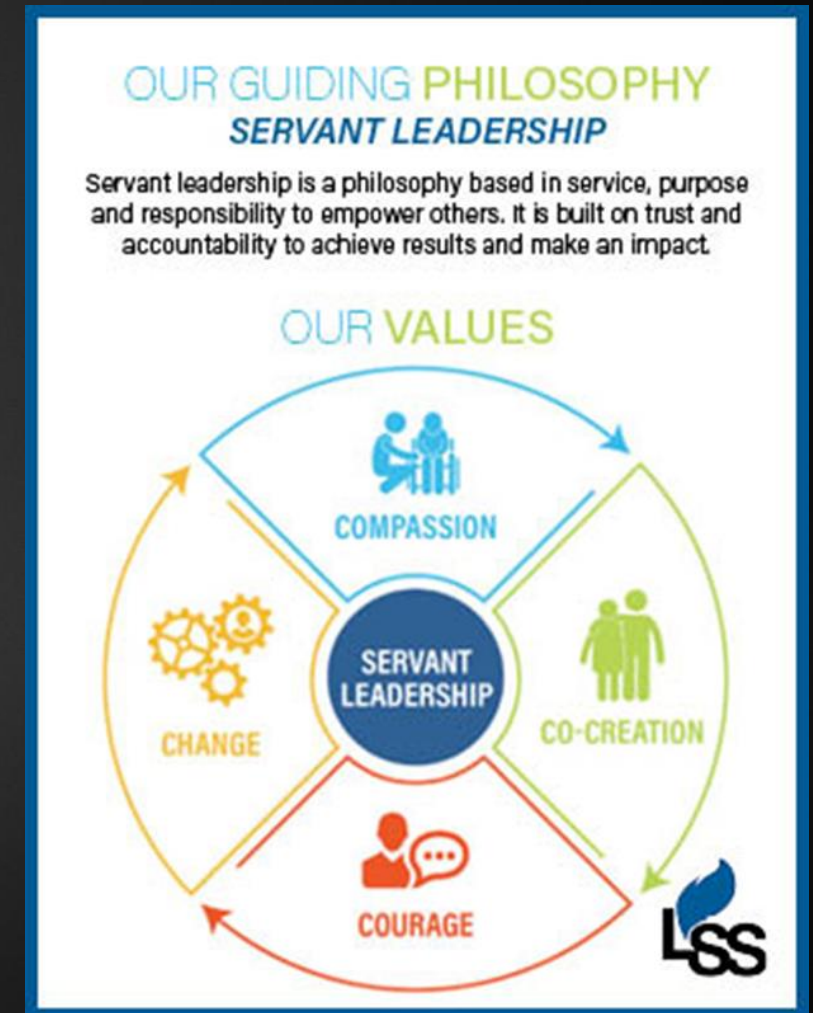
Supportive Service Partnership: Lutheran Social Services

LSS Mission:

Act Compassionately. Serve Humbly. Lead Courageously

LSS Vision: Healthy communities filled with people using their god given gifts to serve

- ▶ **Experience:** We are a proven provider which has developed over our 138 year legacy
- ▶ **Effectiveness:** Over 90% of the people we serve say that we improve the quality of their lives
- ▶ **Efficiency:** LSS beats the industry average on the percentage of dollars raised that are applied to direct client care



Lutheran Social Services

LIHTC Supportive Services

- ▶ Enhance the success of tenant to maintain independence and promote dignity
- ▶ Offer information and referrals in following areas:
 - ▶ Adult Education
 - ▶ Financial Literacy
 - ▶ Employment Services
 - ▶ Health and Government Benefits
- ▶ Completion of intake assessment for participating residents
 - ▶ Development of a case management plan
 - ▶ Linking participating residents to programs that support independence and self sufficiency
- ▶ Schedule quarterly educational presentations and/or workshops
- ▶ Onsite visits monthly for first three months, quarterly thereafter
 - ▶ Service Coordinator available by phone and email when not onsite
- ▶ Regular check ins with onsite property management

Supportive Service Partnership: Middleton Outreach Ministry (MOM)

Mission:

MOM brings our community together to create food and housing security through action and advocacy.

Vision: A community where everyone has the stability to thrive.

Because what we eat, where we live and our connection to community are key determinants of well-being and health, MOM focuses on providing access to these resources for people in our community. MOM hosts one of the **largest food pantries in Dane County** and provides **case management, referrals, and privately-funded housing stability assistance** to all low-income residents of the West Madison, Middleton and Cross Plains communities. MOM has provided services to the west side community for 40 years.



Middleton Outreach Ministry

Supportive Services

- ▶ MOM will be specifically providing services to the 1-2 households that are referred by the Coordinated Entry System.
- ▶ Supportive services provided by MOM staff would include the following:
 - ▶ Taking a progressive engagement approach, MOM staff would meet with each household that was referred by the Coordinated Entry System and complete a needs assessment.
 - ▶ Based on the household needs and in collaboration with the tenants, strengths-based goals would be created. Goal areas may include housing stability, financial, employment, educational, and goals for children, if applicable.
 - ▶ The case manager would work with the household to get connected to MOM services, as well as other community resources that may be beneficial.
- ▶ The frequency at which the case manager would contact the household would be dependent on household need, but at a minimum, the case manager would reach out once per month to assess progress being met toward their goals.
- ▶ Case management would be conducted on-site or via phone or other virtual platform.

Property Management Partner: Oakbrook Corporation

- ▶ Oakbrook has been providing management services in Wisconsin and Illinois for over 30 years. Our diverse portfolio made up of over 6,000 units is a blend of market rate and affordable housing.
- ▶ Core Values
 - ▶ Ethical
 - ▶ Professional
 - ▶ Collaborative
 - ▶ Family



Oakbrook Residential

- ▶ Well versed in LIHTC housing and working in partnership with supportive services
- ▶ History of collaboration with many supportive service organizations (LSS, Movin' Out, NewBridge, etc)
- ▶ Affirmative marketing backed by professional management
 - ▶ Committed to affirmative and proactive fair housing – AFHMP
 - ▶ Frequent communication with supportive services throughout lease up and beyond to ensure residents can utilize these resources
 - ▶ Consistent and professional management to ensure continued success of properties within the community