



DEVELOPMENT PROPOSAL

Community Development Authority
City of Madison
215 Martin Luther King, Jr. Boulevard
Madison, Wisconsin

The following proposal is in response to the Community Development Authority of the City of Madison's request for qualifications for the Triangle redevelopment.

August 27, 2021

LETTER OF INTEREST

Dear Mr. Johns,

On behalf of Northpointe Development ("Northpointe"), we thank you for the opportunity to submit our qualifications for the redevelopment of the Brittingham, Gay Braxton, and Karabis Apartments and Parkside Towers and Townhouses (hereafter, known as the "Triangle") in the City of Madison. The redevelopment of this unique area is truly an outstanding opportunity to bring a renewed sense of vibrancy to the neighborhood and advance the goals of the Community Development Authority of the City of Madison.

Northpointe is a Wisconsin-based development company that has developed over 1,200 units of market rate and affordable multi-family housing. In the past ten years, Northpointe has been awarded tax credits from the Wisconsin Housing and Economic Development Authority (WHEDA) for over 25 affordable housing projects within the state.

Our team is ready to begin work immediately if selected and has partnered with minority-owned development firm DreamLane Real Estate Group. Together, we can ensure all voices are heard and that any proposal leads to equitable outcomes. We assembled a team that consists of mainly Madison based industry experts and with the combined strength of our team including our HUD consultant, Baker Tilly, we are prepared to rejuvenate The Triangle and ensure it aligns with all HUD and City requirements.

Together, our team believes greatest success will come from combining HUD resources with those available from the Wisconsin Housing and Economic Development Authority ("WHEDA") and Community Development Financial Institutions Fund ("CDFI Fund"). With a team comprised of long-time low-income housing tax credit developers and former WHEDA regulators, we believe we are uniquely positioned to leverage such resources.

Northpointe has built a reputation for listening to neighbors and municipal leaders – letting their ideas and feedback take the driver seat. This engagement through in-person, virtual, and private sessions will allow us to develop a plan that meets the goals of this RFQ. The community feedback provided to date and summarized in the Triangle Monona Bay Neighborhood Plan will be the framework for our proposal, with continued resident engagement along the way.

The logistical complexities of this project require a team with the vision and track record to successfully implement the community derived vision. We believe Northpointe has the expertise to meet the demands of this unique project and go far beyond any expectations.

We look forward to working with your community and its stakeholders, most importantly – the residents.

Sean O'Brien
Northpointe Development Corporation
2628 Saw Tooth Drive
Fitchburg, WI 53711
(608) 334-5665
sean@northpointedev.com

TEAM STRUCTURE

Developers:	Northpoint Development Corp., LLC 230 Ohio Street Oshkosh-, WI 54902 (608) 334-5665 Contact: Sean O'Brien sean@northpointedev.com	DreamLane Realty Group 5320 Monona Drive Monona, WI 53716 608-535-5131 Contact: Lane Manning lane@dreamlanere.com
HUD Consultant:	Baker Tilly 4807 Innovate Lane Madison, WI 53718 (608) 240-2643 Contact: Don Bernards donald.bernards@bakertilly.com	
Service Coordination:	Lutheran Social Services along with additional partnerships to be formed based on community input and identified needs	
Architect:	Knothe & Bruce Architects, LLC 7601 University Avenue, Suite 201 Middleton, WI 53562 (608) 836-3690 Ext 110 Contact: Kevin Burow kburow@knothebruce.com	
Engineer:	Vierbicher Associates, Inc. 999 Fourier Drive, Suite 201. Madison, WI 53717 (608) 821-3947 Contact: David Glusick dglu@vierbicher.com	
Contractor:	Northcentral Construction Corporation 631 South Hickory Street Fond du Lac, WI 54935 (920) 929-9400 Contact: Pat Donovan patd@nccbuilds.com	Krupp General Contractors 749 University Row STE 101 Madison WI 53715 (608) 249-2020 Contact: Paul Lenhart Plenhart@kruppconstruction.com
Property Management:	To be determined based upon community input and future CDA conversations, Northpointe development has successfully partnered with ACC Management, Oakbrook, and LSS in the past and would be open to including them in this redevelopment proposal.	
Attorney:	Reinhart Boerner Van Deuren 22 East Mifflin Street, Suite 700 Madison, WI 53703 (414) 298 - 8330 Contact: Bill Cummings, wcummings@reinhartlaw.com	

FIRM QUALIFICATIONS AND EXPERIENCE

Northpointe Development

Low-Income Housing Tax Credit (LIHTC) experience

Top-Notch Reputation

Northpointe Development is well regarded in the industry after years of successful project completions. With our track record, residents could rest assured they will be heard, and their vision will lead the process.

Our team is uniquely experienced in working with both the State and Federal Low-Income Housing Tax Credit programs.

Northpointe has developed new construction family and senior affordable housing, completed extensive historic rehabilitation, and built commercial properties throughout Wisconsin.

Northpointe is led by individuals who wrote and implemented the rules of Wisconsin's Affordable Housing programs. The team has intimate knowledge of Section 42 regulations.

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. Northpointe is one of WHEDA's largest and long-term customers, consistently receiving the highest developer team score possible for a for-profit developer. 100% of the Housing Credit awards received by Northpointe have moved forward into quality housing developments. Northpointe and its principals have the capacity to successfully complete the project as well as secure market to above market equity pricing.

Northpointe has maintained a reputation for creative problem solving. We have received numerous awards for our ability to re-think spaces and places – including:

2013	Top Projects Award Milwaukee
2015	National Historic Preservation Award
2014	Runner-Up for J. Timothy Anderson National Award for Excellence
2017	Wisconsin Trust for Historic Preservation Award
2019	Remarkable Milwaukee Award
2019	Carolyn Kellogg Historic Preservation Award

The majority of our portfolio utilizes the Low-income Housing Tax Credit program as well as other available resources including Home, TIF, Brownfield Grants, Federal and State Historic Credits. A significant number of our developments have required us to connect with government entities, including the Department of Natural Resources, HUD, WHEDA, WEDC, the Federal Energy Regulatory Commission. Our team also has previous experience working on Choice Neighborhood and NMTC projects.

Northpointe Development has made equity and inclusion work a top priority in recent years. Our work is highlighted by our partnerships with **DreamLane Real Estate Group** and our continual push for the inclusion of MBE/WBE/DBE construction sub-contractors. DreamLane takes on an active leadership role in each of our developments, helping to lead community engagement efforts and work through the entitlement process.

LIHTC EXPERIENCE

29

LIHTC AWARDS

1,200

UNITS

\$230,000,000

IN DEVELOPMENT

The table below summarizes some of our Housing Tax Credit work:

Northpointe Experience	# of Units	Total project costs	Year Completed
The Rivers Senior Living	60	\$8,231,087	2011
Bayside Senior Living	24	\$3,324,739	2011
Kenwood Senior Living	24	\$3,519,290	2012
Fair Acre Townhomes	55	\$8,730,209	2012
The Fountains of West Allis	35	\$3,324,333	2012
Blackstone Cottages	24	\$3,646,938	2013
Oconomowoc School	55	\$10,798,685	2013
Nicolet Townhomes	60	\$9,463,364	2014
Anthem	80	\$8,833,073	2015
Mercantile Lofts	36	\$8,676,974	2016
The Rivers II Senior Living	40	\$6,205,802	2016
Shoe Factory Lofts	55	\$11,767,591	2016
Woolen Mills Lofts	60	\$13,077,712	2017
Bayshore Townhomes	32	\$5,722,857	2017
Century Building	44	\$13,003,776	2018
Whispering Echoes	28	\$5,054,224	2018
Cranberry Woods	40	\$6,943,913	2018
Regency Place	40	\$7,030,069	2019
Arbor Terrace	40	\$7,166,527	2020
Crescent Lofts	69	\$16,676,852	2021
City Center	40	\$7,781,249	2021

Baker Tilly

Public housing authority (PHA) experience

Members of our team have extensive experience with PHAs and the rules and regulations promulgated by HUD that govern their operations and finances. They served in various capacities from program manager to development consultant to financial advisor in areas such as developer evaluation and selection, relocation, demolition, disposition, funding applications, revitalization planning, asset management, construction management, financial leveraging and the Capital Fund Financing Program (CFFP). Our team members have experience with HUD mixed-finance requirements and frequently consult with clients on the regulatory requirements of their major funding sources and housing programs.

The CDA will benefit in Baker Tilly’s experience and understanding of HUD public housing redevelopment programs and applicable HUD regulations. Baker Tilly has provided financial advisory services to PHAs throughout the nation on both individual projects and in long-term portfolio management. While providing advisory services to various clients, Baker Tilly specialists have become very knowledgeable and experienced in HUD and state regulatory requirements and processes, including, the acquisition and disposition of assets, applying for and securing approval for alternative funding sources and uses, securing development plan and financing approval and more.

The table below summarizes some of our work with PHA clients.

Baker Tilly housing authority experience	State	# of Units	Total project costs	Credits
Elgin Housing Authority	IL	164	\$33,400,000	9%
Housing Authority of the City of Milwaukee	WI	97	\$44,000,000	4%
Housing Authority of the City of Milwaukee	WI	44	\$14,000,000	9%
Housing Authority of the City of Milwaukee	WI	122	\$19,700,000	9%
White Plains Housing Authority	NY	95	\$23,100,000	4%
Deerfield Beach Housing Authority	FL	96	\$16,500,000	4%
Springfield Housing Authority	IL	92	\$14,900,000	9%
Merrill Housing Authority	WI	102	\$12,300,000	9%
Northwest Georgia Housing Authority	GA	96	\$11,900,000	4%
Wausau Community Development Authority	WI	149	\$11,100,000	9%
LaGrange Housing Authority	GA	91	\$10,600,000	4%

More than 20 years of experience

Baker Tilly has more than 20 years of experience working with housing authorities of a similar size to the CDA, as well as many in the state of Wisconsin working in conjunction with WHEDA. In Wisconsin, we have worked with Milwaukee, Green Bay, Wausau, Wisconsin Rapids, Kaukauna, Oconto, Merrill and Antigo. We have worked on portfolio repositioning with housing authorities such as Flint, MI, LaGrange, GA and Anne Arundel, MD.

Baker Tilly housing authority experience	State	# of Units	Total project costs	Credits
LaGrange Housing Authority	GA	70	\$9,800,000	9%
Montgomery County Housing Authority	IL	37	\$8,000,000	9%
Mitchell Housing Authority	SD	105	\$7,300,000	9%
Antigo Housing Authority	WI	84	\$5,200,000	9%
Oconto Housing Authority	WI	74	\$15,300,000	4%

Repositioning expertise

Baker Tilly is at the forefront of the RAD program initiative. Baker Tilly served as a sub-contractor to HUD on a national contract to provide technical assistance to PHAs for the RAD program from 2012 – 2014.

We assist PHAs in assessing their developments as it relates to RAD/Section 18 feasibility as well as present on the topic at several state and regional housing conferences. We collaborate with developers experienced in housing and the HUD repositioning programs to efficiently and effectively address the challenges and opportunities presented with each project. In addition, we have a long track record with WHEDA and work on development teams with many successful projects annually.

By teaming with Baker Tilly, we will be able to help the CDA convert your housing units under HUD's repositioning tools, access other affordable housing financing options and navigate the development process successfully. We will review the details of each project, potential funding sources, and capital needs as we work on the program to confirm the best project structure.

We leverage our experience with obtaining many layers of financing and with understanding the complex layers of compliance that come with using them to:

- Evaluate RAD/Section 18 feasibility and perform financial modeling
- Complete the RAD program application/Section 18 application and manage HUD processing
- Identify, apply for and obtain tax credits, tax-exempt bonds and other financing sources, as necessary
- Structure and underwrite mixed-finance transactions
- Negotiate with equity investors and lenders

Baker Tilly has played an integral part of the RAD program since its inception in 2012 and has assisted in the conversion of thousands of affordable housing units.

RAD EXPERIENCE

28,000

UNITS FOR RAD
APPLICATIONS

2,807

UNITS CLOSED RAD
TRANSACTIONS

\$431M

DEVELOPMENT COSTS

Additional Team Members

Supportive Services Provider(s)

Northpointe will utilize community engagement to identify supportive services required and non-profit partnerships that can contribute to the overall health/wellbeing of residents. These partnerships are especially important given the current resident profile of physical/mental challenges and the majority living alone. Providers will be tasked with identifying opportunities to reduce social isolation and experts in Early Childhood Education, Homeownership, arts/culture programming, and employment training will be prioritized.

Lutheran Social Services of Wisconsin and Upper Michigan (“LSS”), a non-profit 501c3, has agreed to serve as one of the several service providers anticipated for the redevelopment. Northpointe has worked with Lutheran Social Services on several affordable housing developments and witnessed firsthand the strength of their organization. LSS offers a variety of Housing Programs to fulfill their vision of healthy communities for all ages, needs, and incomes. These include: HUD Subsidized Housing, Services to Persons Experiencing Homelessness, Affordable Housing Empowerment Services, and Service Coordination.

Architectural and Engineering Services

Both Madison based firms, **Knothe & Bruce** as well as **Vierbicher** will provide architectural, master planning, and civil engineering services – working to design spaces that both promote inclusivity and align with the vision of residents. Knothe has extensive experience in navigating the City of Madison’s Entitlement process for all building types including mid to high-rise as well as energy efficient and sustainable buildings. Vierbicher’s core service is civil engineering, their extensive due diligence, market-based approach, and public funding expertise have made them an industry leader with unmatched success rates.

Our team has created affordable communities like those envisioned in the neighborhood plan – with an emphasis on inspiring design and the inclusion of sustainability elements, community space, green space, and underground parking. Both are among the highest respected real estate service leaders in Wisconsin, and our hope is that combining their experiences will allow us to increase the creativity that goes into site planning and community engagement.

Contractor

Northcentral Construction and **Krupp General Contractors** were asked to join our team. With two contractor partners, we are confident we will be able to obtain the most competitive bids for each phase of the redevelopment. Further, we intend on pushing each contractor to submit bids that include the highest proportion of Section 3 participants. With the flexibility of choosing our own construction team, Northpointe is in a place of superior negotiation strength.

Property Management

The Property Management decision will be reached in collaboration with CDA. Northpointe Development has a long track record of working with **ACC Management**, **Oakbrook**, and **Lutheran Social Services of Wisconsin and Upper Michigan** to manage our affordable portfolio – these entities would be available for this redevelopment.

PROJECT SCOPE / APPROACH

Understanding Scope

The re-development of The Triangle is an opportunity for Madison to rethink a major space and prized neighborhood, which we hope will serve as a case study for Master Planning as well as the effectiveness of HUD repositioning programs. Upon selection, the development team will immediately schedule a meeting with the Neighborhood Plan Steering Committee and begin the resident engagement process through a meeting with The Triangle Neighborhood Association. With a team located in Dane County, we will meet with the project team weekly.

Our approach will be to work with the residents in developing a master plan, with our team bringing the capacity and experience to see their vision through. The redevelopment plan is going to take very careful planning. Important considerations will include:

- Weighing benefits/risks of rehabilitating existing structures and building anew
- Understanding density and creating an appropriately sized site plan
- Identifying opportunities for synergies with the Bayview development, existing medical uses, and other frequented downtown Madison locations
- Developing new ways to access the city through sidewalks and bike paths, improving upon connections with existing transportation infrastructure

The team envisions creating strong partnerships with both non-profit organizations and supportive service providers to assist residents and coordinate community activities. Northpointe hopes to create a neighborhood with significant common space (community centers, green space, outdoor gathering areas) and resident resources, modeling after the Bayview Development and Westlawn Renaissance campus in Milwaukee. These will align with community needs identified through the neighborhood engagement process.

Phase of Work Schedule

August 2021	Submittal of RFQ Response
September 2021	Developer is selected
October 2021	Begin Phase I: Vision and Master Planning
November 2021	Begin Community Engagement Process
June 2022	Begin Phase II: Financial Plan
December 2022	Submit Phase I Funding Applications
April 2023	WHEDA Announcement of LIHTC Awards
May 2023	Begin Phase III: Implementation
June 2023	Phase I Final Plan Approval by City
September 2023	Start Construction Phase I
June 2024	Phase I Placed in Service
December 2024	Phase I Stabilized Occupancy

*Will be required to go through several stages of competitive funding applications for subsequent phases

Sustainable Development Practices

Sustainable practices impact the overall health and wellbeing of residents.

The development team will use sustainable building materials and design that embrace the City's commitment to achieve 100% renewable energy and zero-net carbon emissions by 2030. The team will utilize the city's Sustainability Plan, Comprehensive Plan and the TMB Plan as framework and work closing with our team of architects, engineers, and contractors to determine financially feasible outcomes while researching and applying for sustainable energy grants.

Northpointe will ensure the project strikes the right balance between sustainability outcomes and affordable housing goals. Significant green infrastructure ideas will be implemented as well to reduce flooding impacts. We plan to apply for solar panel grants as well as other energy saving programs. At least 20% of the total units will contain universal design features. Universal Design, as defined by the Center of Universal Design, is "the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialization." Northpointe recognizes the need to create housing including Universal Design features while maintaining aesthetics and affordability.

Soliciting Resident Engagement

The proposed development team fully intends to follow the same process taken with all our affordable housing developments – engaging the residents early and often. It is those who have lived there for so long that have the perspectives, concerns, thoughts, and ideas that can reveal strategies to best revitalize the community.

We are committed to hearing from the neighbors through inclusive community engagement practices. We will take a multi-faceted approach to this engagement. Residents must stay informed about the process and have significant opportunities to contribute to design proposals.

DreamLane Real Estate Group – a minority developer and State certified Minority Owned Business - has been brought onto the team to ensure all voices are heard throughout the process and that racial equity remains a priority.

Given the size and scope of the project, our team will rely on this input to ensure we have created the optimal development plan to bring a sense of pride and enjoyment to the community. No site proposals are being provided as part of this submittal due to the level of community engagement required.

Significant Financial and/or legal Impediments to Revitalization

There will be significant financial and legal impediments that come up throughout the process. The proposed development team is no stranger to tackling these and has a track record of success. Roadblocks will include the competitive nature of most affordable housing financial resources, legal challenges related to HUD regulations, and the difficult construction cost environment.

EXPERIENCE

Describe the team's experience, as a team, on a HUD Asset Repositioning projects and programs.

See Baker Tilly Company Background for experience being brought to the team on HUD Asset Repositioning project and programs.

HUD Section 3 Experience

Northpointe Development has a strong track record of making it a priority to have local contractors complete all trade work and encouraging Section 3 along with MBE/WBE/DBE participation.

Northpointe has a reputation with WHEDA for exceeding all MBE/WBE/DBE goals as set forth as part of their Housing Tax Credit Program. Further, with a significant portion of completed developments having utilized HOME funds or National Housing Trust Funds, Northpointe has extensive experience working with Section 3 requirements.

To us, this is more than a programmatic requirement - It is a way to stretch the cataclysmic impact of our work and have an impact that goes beyond providing our residents with an affordable place to call home. We will share previous Section 3 plans with the selection committee upon request.

MBE/WBE/DBE Participation

Northpointe Development understands the impact MBE/WBE/DBE participation could have on individuals, developments, and communities at large. We take it a step beyond working with these locally disadvantaged firms on the construction side.

Racial equity and social justice are major priorities throughout this process. DreamLane Real Estate Group, owned by Lane Manning, has worked with Northpointe on several affordable housing developments and has been asked to take a lead role in this redevelopment. Lane's strength is that of community organizing – with intimate knowledge of the entitlement process, Lane can effectively engage a diverse group of residents.

Case Study: Baker Tilly HUD Asset Repositioning Experience

Our team has unmatched enthusiasm and experience for housing redevelopment. With our consultant, Baker Tilly, the team brings the experience of having successfully navigated housing authorities through all stages of each HUD repositioning program. Their team brings significant familiarity with asset, phased, and full housing authority portfolio repositioning.

The below case study has been provided by Baker Tilly:

Among the most challenging of prior HUD repositioning projects was at the asset level, as the RAD consultant for a 50-year-old property consisting of 200-units ("The Project"). The Public Housing Authority client ("The PHA") was interested in a straight-subsidy conversion (no utilization of debt) to RAD PBV. However, the program, financing, and transaction paths changed several times between initial stages and RAD closing. Work is currently in progress on the substantial rehabilitation at The Project, with the repositioning and rehabilitation funded by over \$32 million in tax credit equity, a HUD-FHA loan, and various sources of soft funding from local agencies.

Like each of our projects, we conducted monthly progress meetings with the client. The effectiveness of each progress meeting ¹was boosted by our team's repositioning progress documents. Regular email communication and adding calls/meetings as needed made for solid communication between the internal team and client throughout repositioning. For 3-4 months, progress meetings may have felt repetitive for the client. Upon review of the RAD Capital Needs Assessment (CNA) and e-Tool, the transactional path needed re-evaluation. The CNA identified deferred maintenance items along with a multitude of capital needs for completion over the 20-year reserve period. Even more significantly for the deal structure was the high cost associated with the identified capital items including HVAC systems, electrical wiring, plumbing, and some roofs.

Continual Re-evaluation

- What can be re-evaluated in the CNA?
- What are financing needs and options?
- What is the status of soft funding application rounds, e.g. tax credits, Federal Home Loan Bank, federal HME and CDBG?
- Are any environmental issues expected to have a cost associated? ♦Will the opposite RAD conversion type offer more rental income?
- What benefits/challenges would another HUD repositioning program bring?

¹ Each client progress meeting is made more effective by the following repositioning progress documents: topic-specific agendas, timelines (summary and detail versions), and comprehensive checklists. While these documents align with HUD program requirements, they also track development milestones. In advance of each progress meeting, the client will receive a detailed agenda along with the latest timeline and checklist. Following the meeting, our team uses thorough meeting notes to update the timelines and checklists. Meeting minutes and action items are circulated to the client and internal team.

We brainstormed ideas that related to every aspect of a repositioning – and for The Project used in this example, what we could see was turning out to be a redevelopment and revitalization.

The Project was 50 years old with more capital needs than anticipated by The PHA, so we went back to the drawing board with the design team. Since Fair Market Rents (FMRs) in the area were not high, the percentage increase in rental income through a Section 18 conversion would be minimal. The PHA was already administering RAD PBVs. Administratively and operationally, continuing with RAD PBV was the best program option. On-site demolition and new construction appeared to be a viable, but costly and time-consuming, redevelopment alternative. The client and team determined the best option was a change in unit configuration. FHEO approved our request to re-configure two larger units into two 2-BRs, as needed for the market. Also approved was our request for a de minimis reduction of two dwelling units, allowing for conversion of a duplex into a non-dwelling resident services space. None of these actions required new construction activities. The team's feasibility analysis correctly determined that per-unit rehab needs would meet criteria for a HUD 221(d)(4) FHA loan. Every design change impacted General Contractor (GC) costs, the CNA e-Tool, and Plan and Cost Review, requiring updates to each.

We consistently monitored our project management timeline, which tracked required HUD (RAD and Multifamily FHA) milestones along with development, tax credit, and soft funding deadlines that needed to be met on a parallel basis. It was challenging to align the requirements and schedules for each agency (and HUD program office), particularly amid design and budget changes. Understanding the impact of changes specific to certain requirements/schedules was helpful in managing the complete project timeline and achieving The Project's successful repositioning. This is an example of the return-on-investment value of a team who respects and trusts one another; one teammate may view a change as "minimal" while another teammate has information about the bigger picture implications. While the team and client may choose to move forward, the internal team maintains trust and communication and the project timeline remains updated and reliable. The strong communication and active listening skills of our team are advantageous to clients in every step of repositioning and redevelopment, from Kick-off to Certificate of Occupancy!

Wisconsin Low Income Housing Tax Credit (LIHTC) Success

See Northpointe Development Company Background for experience being brought to the team on LIHTC transactions.

REFERENCES

Client for whom the respondent has performed or is performing HUD-compliant redevelopment/revitalization work, or work substantially similar to that described in this RFQ:

Fernando Aniban
Chief Financial Officer
Housing Authority of the City of Milwaukee
809 N. Broadway Street
Milwaukee, WI 53202
Phone: (414) 286 - 5885
E-Mail: Fernando.Aniban@hacm.org

Lori Ratzburg
Executive Director
Kaukauna Housing Authority
125 W. 10th Street
Kaukauna, WI 54130
Phone: (920) 766 - 4772
E-Mail: kha125@sbcglobal.net

Reference related to project funded by Low-Income Housing Tax Credits (LIHTC):

Shreedhar Ranabhat
Commercial Lending Product Manager – Lending
Wisconsin Housing and Economic Development Authority
201 W. Washington Avenue, Suite 700
Madison, WI
Phone: (608) 266 – 2781
E-mail: Shreedhar.Ranabhat@wheda.com

Additional References:

Maria Priolette
Department of City Development
809 N. Broadway
Milwaukee, WI 53202
Phone: (414) 286 – 5903
E-Mail: MPriol@milwaukee.gov

Allen Davis
Community Development Director
City of Oshkosh
215 Church Avenue
Oshkosh, WI 54901
Phone: (920) 236 – 5055
E-Mail: A.Davis@ci.oshkosh.wi.us

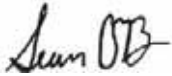
DISCLOSERS

Application Certification

The Undersigned hereby acknowledges and certifies individually, and on behalf of the Applicant and the Development as part of this Statement of Qualifications as follows:

No team member that has acted as a development partner or has any ownership in any project currently underway or completed within the last five years has:

- Any foreclosure, default, or bankruptcy within the past ten years OR
- Any litigation completed, pending, or underway in relation to any financing or construction project within the past five years.



Sean O'Brien

Partner

Northpointe Development

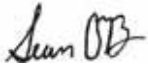
COMPLIANCE

Application Certification

The Undersigned hereby acknowledges and certifies individually, and on behalf of the Applicant and the Development as part of this Statement of Qualifications as follows:

The Development team fully intends to comply with the Affirmative Action Ordinance of the City of Madison (MGO 39.02).

All members of the team that require licensing and are/will be licensed within the State of Wisconsin for the duration of the project and carry sufficient Errors and Omissions Insurance.



Sean O'Brien

Partner

Northpointe Development

Northpointe Development Resume

Callan Schultz

Callan Schultz is a founder and partner of both Keystone and Northpointe

Development, he has been active in the development of multi-family housing since 1999. Cal formed Keystone Development, LLC in 1999 and later started Northpointe Development with Andy Dumke in 2011. Throughout his career, he has built over 3,500 units of multi-family housing throughout the states of Wisconsin, Michigan, Ohio, and Iowa. With over 1,300 Section 8 units in his portfolio – Cal has been through the HUD regulatory process and has successfully partnered with many organizations to provide additional supportive services to residents.

Andrew Dumke

Andrew Dumke is a founder and partner of both Alliance and Northpointe

Development, he has been active in many aspects of the real estate industry since 1993. Andy spent most of his career developing commercial real estate with Alliance Development – Andy expanded his portfolio to multi-family with the establishment of Northpointe Development. Andy has found great synergies between the sectors – specifically when it comes to master development planning and collaborating with municipalities.

Alliance Development has developed over \$200mm in real estate. Samples of nationally accredited tenants are Starbucks, Panera, Fed EX/Kinkos, TJ Maxx, US Cellular, Verizon, Chipotle, Baker Tilly, and Old National Bank. With a portfolio of over 1,000,000 square feet, Andy is involved with multi-family apartments, commercial office buildings, warehouse buildings, and retail centers.

Sean O'Brien

Sean O'Brien is a partner of Northpointe Development, he has been involved with housing and community development for over 15 years. Prior to Northpointe, Sean worked at the Wisconsin Housing and Economic Development Authority (WHEDA) for 14 years. The last 6 years of which 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 creates or preserves at least a thousand affordable homes annually. For four years, Sean served on the Community Investment Advisory Council for the Federal Home Loan Bank of Chicago. Sean has been involved with countless HUD transactions including RAD, Repositioning, and Housing Choice Neighborhoods during his tenure at WHEDA. He also worked closing with the CDFI Fund to obtain and deploy New Markets Tax Credits and Capital Magnet Funds.

Jake Victor

Jake Victor is Vice President of Development for Northpointe Development, he began his career at WHEDA. Jake was tasked with allocating the state's Housing Tax Credit programs, originating multifamily loans, and overseeing Wisconsin's National Housing Trust Fund Program. Jake successfully originated over \$140mm in lending activity (14 developments) for affordable housing and was deeply involved with more than 30 LIHTC transactions. These included complex HUD/Section 42 mixed financing developments, such as the Holton Terrace RAD Conversion, Oak Grove Development, Phase II, and was lead on several phases of Westlawn Renaissance – a choice neighborhood and majority section 8 LIHTC development completed by the Housing Authority of the City of Milwaukee.

Master Developer Experience

Marion Road Oshkosh, WI

The Rivers- 60 Unit Senior Affordable

The Rivers II- 40 Unit Senior Affordable

Anthem Lofts- 80 Unit Market Rate



In 2008, the City of Oshkosh chose to work with Northpointe Development to redevelop a severely contaminated industrial manufacturing site along the Fox River. Once a home to Mercury Marine Manufacturing Plant is now has a vibrant River Walk and three housing developments. Northpointe developed all three buildings containing a total of 180 units, two of which are senior affordable properties and one market rate property. These developments have been catalytic for additional redevelopment on surrounding parcels.



Nicolett Townhomes
60 Units- Family Housing
1380 Scheuring Road, DePere, WI

Nicolett Townhomes is a 60-unit family LIHTC property that was completed in 2014. Located within walking distance to retail, banking, and restaurants. The townhome development offers one, two, and three-bedrooms with individual entrances, attached garages, central air conditioning, washer/dryer, free wifi, and stainless steel appliances. The property has an on-site office, community room and fitness center.



Blackstone Harbor Apartments
24 Units- Family Housing
10525 Judith Blazer Drive, Sister Bay, WI

Nicolet Townhomes is a 24-unit family LIHTC property that was completed in 2013. Located in the heart of Door County the unique single-story development offers one, two and three bedrooms with individual entrances, attached garages, central air conditioning, washer/dryer, free wifi, and stainless steel appliances. The property has on-site office, community room and fitness center.



MERCANTILE LOFTS

36 Units Market Rate/Office/Commercial
 611 West National Avenue, Milwaukee, WI

Mercantile Lofts is a 36-unit apartment property with office and commercial on the first floor completed in 2016. The building was originally construction in 1901 as a department store and was redeveloped under the historic guidelines of the National Parks Service. The tall ceilings and polished concrete floors were preserved and incorporated in the apartments. The famous Mural of Peace was also preserved and restored. WHEDA's Milwaukee office is currently located in the building.



Woolen Mills Lofts

60 Units- Family Housing

218 E. South Island St., Appleton, WI

Woolen Mills Lofts is a 60-unit family LIHTC property completed in 2017. The factory building which was originally construction in phases between 1893-1962 was redeveloped under the historic guidelines of the National Parks Service into one, two, and three-bedroom units. The exposed brick walls, hardwood ceiling, steel girders, and large exterior windows were preserved and restored.

DreamLane Real Estate Group Resume



Dream Lane Real Estate Group, LLC **Lane Manning, Principal**

*1103 Carter Ct
Verona, WI 53593*

*608-535-5131
lane@dreamlanere.com*

OBJECTIVE

Create and operate quality affordable housing throughout Wisconsin, Illinois, Colorado, and Iowa.

EXPERIENCE

DreamLane Real Estate Group, LLC Fitchburg, Wisconsin, *Established in 2015*

- Professional Real Estate Brokerage office helping individuals and organizations buy, sell, and invest in all types of properties including: single family, multifamily, vacant land, recreational land, commercial real estate and historic properties.
- Assisting clients to realize the value of real estate ownership/investment and strengthen the communities in which our clients live and work.
- Purchased, sold, invested, own or developed more than 25 million dollars of multi-family, light commercial, and single-family assets throughout Dane County, Milwaukee County, and their surrounding areas.
- 12 years of real estate and property management experience
- Perform on-site reviews of single family and multifamily properties to assess the conditions and risks to the purchaser.
- Negotiated loan and finance documents.
- Review and analyze financial audits and proformas.
- Certified Minority Owned Business Enterprise by the State of Wisconsin Department of Administration for Real Estate Sales, Investment, Development, and Consultation.
- Assist in multifamily site selection, offer negotiations, land entitlements approvals.
- DreamLane's success can be attributed to my passion not only for real estate, but also to my intuition regarding the psychology and desire of home ownership, real estate investment and development. My business has grown successfully and consistently thanks to the repeat business of happy clients and the introductions to friends, family, and neighbors. I expect this trend in to continue as my business shifts even more into the market-rate, affordable, and senior housing sector(s) and diversify my business with my partnership with Northpointe Development

Fitchburg Planning Commission- Commissioner
2017-Present

Mission- The Planning Commission strives to respect the past, safeguard the present, and assure a vital future. Using innovative land use and planning techniques, the Fitchburg Planning Commission implements its mission statement.

Responsibilities

- Providing public assistance to various boards, commissions, and the public for development and preservation
- Assessing the future consequences of present and future land use patterns
- Reviewing all development proposals
- Updating and administering the Comprehensive Plan and associated Neighborhood Plans
- Administering the zoning, architectural, sign, land division, historic preservation, telecommunications, and extraterritorial ordinances
- Zoning, land division, and other land regulation ordinances serve to protect the present by ensuring compatible uses and efficient service costs, thus producing a vital and strong community. All the regulations work together to create a city of common interests able to accommodate diverse opportunities.
- Comprehensive Plan Review: Planning Commission looks to the future by providing a solid framework in the Comprehensive Plan allowing the community to grow in an orderly, cost-effective manner.

EDUCATION

Central Michigan University, 1993 -1997

Wisconsin Realtors Association: Real Estate Pre-Broker Course Madison, WI

- Min 72 hours of coursework
- Course content includes topics such as:
 - Contracts- the Law of Conveyance, validity, drafting, parties
 - approved forms- Offers to Purchase, counter offers, amendments, process, and Authorized practice of law
 - Commercial real estate, multifamily housing finance and operation, vacant land, trust accounts, historic properties, construction, business and property management
 - Escrow and closing statements
 - Financial and Office Management & consumer protection
- Applicants for a Wisconsin broker's license must have practiced as a licensed salesperson under the direct supervision of a licensed broker for at least two years within the last four years preceding application.
- Experience worth at least 40 points must be documented on the application form and verified by the supervising broker. 40 points are required in any combination listed below. Referrals do not count toward the experience requirements.
 - Completed or closed residential transaction = 5 points
 - Completed or closed commercial transaction = 10 points

Wisconsin Realtors Association: Pre- Real Estate Sales Course and CE Madison, Wisconsin

- Min 72 hours of coursework
- Course content includes topics such as:
 - Real Estate Law and Sales
 - Real Estate Broker Management
 - Marketing, Selling, and Social Media principles
 - Excel

Awards & Licenses

WI Licensed Real Estate Broker

WI Licensed Real Estate Salesperson

WI Licensed Property & Casualty provider

2020 Leukemia and Lymphoma Society Madison Man of the Year

Minority Business Enterprise - MBE, WisDP



STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION

Tony Evers, Governor
Joel Brennan, Secretary
James M. Langdon, Administrator

CERTIFICATION

WI-10490 - MBE

**The Department of Administration
Division of Enterprise Operations
having determined that**

DreamLane Real Estate Group

*Has successfully met the certification requirements as outlined in
Wisconsin Administrative Code Adm. 84 and the policies adopted thereunder,
hereby grants the designation of*

Minority-Owned Business Enterprise

and is recognized as such until the expiration of registration and certification on

Expiration: November 11, 2023

NIGP Codes:

20876	Real Estate/Property Management
20977	Real Estate/Property Management
57863	Real Estate: Land and Improvements

NAICS Codes:

See online business directory at: <https://wisdp.wi.gov>

Product:

Real Estate Sales, Investment, Development, and Consultation.

Libby Schmiedlin

Authorized By:

Libby Schmiedlin, Equal Opportunity Specialist

Baker Tilly Resume

Donald N. Bernards, CPA

Donald Bernards, partner in the real estate advisory group with Baker Tilly, has been active in many aspects of affordable housing since 1999.



Baker Tilly US, LLP

Partner

4807 Innovate Lane
Madison, WI 53718
United States

T +1 (608) 240 2643

donald.bernards@bakertilly.com

bakertilly.com

Education

Bachelor of Business Administration in Accounting
University of Wisconsin–Madison

Don is well versed in structuring affordable housing transactions, including the tax issues. Don is adept at creating a checklist of major issues for each project that can put a deal at risk. Immersed in the affordable housing practice, Don has a wide range of experience with projects, owners and investors and has built a wide network of contacts within the field. His enthusiasm and passion for the industry are infectious. “It’s not just about numbers,” he says, “it’s about the end product and growing capacity.” Don has worked on affordable housing transactions in 26 states.

Specific experience

- Manages a portfolio of clients with the affordable housing industry utilizing various programs including Section 42 and Section 8
- Provides financial modeling for acquisition/rehabilitation and new construction tax credit deals
- Part of HUD technical assistance team providing Rental Assistance Demonstration (RAD) technical assistance nationwide to housing authorities through one-on-one training as well as presenting at educational conferences and seminars
- Consults on various 4 percent and 9 percent deals that have a RAD award and are working toward closing
- Assists in the preparation of Low-Income Housing Tax Credit (LIHTC) applications and applications for soft sources of financing, including HOME, Affordable Housing Program (AHP) and Community Development Block Grants (CDBG)
- Determines optimal Historic Tax Credit transaction structure, works with attorneys to ensure structure abides by safe harbor guidelines and advises on maximizing qualified rehabilitation expenditures (QREs)
- Assists with obtaining debt for various types of affordable housing, including taxable and various tax-exempt debt totaling more than \$350 million over the past five years
- Provides assistance with portfolio acquisition and disposition strategies and implementation

Donald N. Bernards, page 2

Specific experience, continued

- In the past five years, assisted in raising and closing more than \$500 million in equity for LIHTC and Historic Tax Credit projects
- Reviews budgets and performs financial analysis on assisted living projects
- Assists with cost segregation studies for affordable housing properties
- Involved in many tax aspects of a project, from transaction structuring to planning and preparation
- Reviews 10 percent tests and cost certifications
- Clients include developers that are not-for-profit, Public Housing Agencies, Tribal Housing Entities and for-profits, as well as tax credit investors

Industry involvement

- Wisconsin Institute of Certified Public Accountants (WICPA)
- American Institute of Certified Public Accountants (AICPA)
- American Bar Association -- Member Forum on Affordable Housing & Community Development Law; also, Tax Credits and Equity Financing Committee
- Tax Credit Advisory Board Member for State Housing Finance Agency
- Frequent speaker at regional and national conferences on affordable housing issues, including the RAD Collaborative, Affordable Housing Finance, National Housing & Rehabilitation Association, National Association of Housing and Redevelopment Officials, HUD, Iowa Finance Agency, Minnesota Housing Finance Agency, Illinois Housing Development Authority, Wisconsin Housing & Economic Development Authority, Michigan State Housing Development Authority, among others

Community involvement

- United Way of Dane County Foundation Board Member
- United Way Affordable Housing Fund Committee Chair
- Luke House community meal program lead
- Luke House Board Member

Kaitlin M. Konyn

Kaitlin Konyn, a senior manager with Baker Tilly's real estate transactions team, has been with the firm since 2015.



Baker Tilly US, LLP
Senior Manager
4807 Innovate Lane
Madison, WI 53718
United States

T +1 (608) 240 2425
kaitlin.scopoline@bakertilly.com
bakertilly.com

Education

Bachelor of Science in Housing Studies
University of Minnesota–Twin Cities

Kaitlin specializes in consulting with, and assisting developers apply for various sources of funds to build multifamily, affordable housing developments. She provides advisory services on real estate transactions that typically involve tax incentives such as Low-Income Housing Tax Credits (LIHTC).

Specific experience

- Manages client relationships including nonprofit, for-profit and public housing authorities and assists with transaction structuring from concept to closing
- Assists in the preparation of LIHTC applications including 9 percent and tax-exempt bonds
- Consults on applications for soft financing sources including HOME and CDBG
- Prepares applications for AHP funds to various Federal Home Loan Bank regions including Boston, Chicago, Cincinnati, Indianapolis and Pittsburgh
- Provides financial modeling for acquisition/rehabilitation and new construction LIHTC deals
- Provides consulting to housing authorities and developers on the US Department of Housing and Urban Development (HUD) Rental Assistance Demonstration (RAD) program from initial application to award to financing plan to RCC to closing
- Strategically analyzes portfolios for housing authorities to determine potential repositioning options
- Assists with tracking and monitoring construction budgets
- Assists in coordinating and executing due diligence for prospective mixed-use and residential developments
- Assists in securing equity for LIHTC projects through networking with investors and reviewing letters of intent
- Completes first year tax credit delivery calculations
- Provides Year 15 analysis for LIHTC projects

Community involvement

- Rodney Scheel House Foundation Board Member

Jenn Krieher, MPA, LEED AP

Jenn Krieher is a manager with Baker Tilly



Baker Tilly US, LLP
205 N Michigan Ave
Chicago, IL 60601
United States

T +1 (312) 228 7233
jenn.krieher@bakertilly.com
bakertilly.com

Education

Master of Public Administration (MPA)
University of Wisconsin-Milwaukee

Bachelor of Arts in political science
Marquette University

Jenn has 17 years of affordable housing experience, with a strong housing preservation background. Working for 11 years at the U.S. Department of Housing and Urban Development (HUD) in the Office of Recapitalization gave Jenn the opportunity to interact directly with owners of affordable housing, including Public Housing Authorities (PHAs). As a RAD Transaction Manager at HUD, Jenn became familiar with repositioning from public housing to Section 8. Her previous position at the Housing Authority of the City of Milwaukee gave Jenn insight on resident relations, relocation, and reporting to HUD. Jenn earned her MPA degree as a HUD Community Development Work Study Scholar. She has working relationships with key players in housing across the country and deep knowledge of RAD and SAC programs.

Specific experience

- Strategically analyzes affordable housing portfolios for developers and housing authorities to determine potential repositioning and recapitalization options
- Provides consulting to developers and housing authorities on all repositioning programs offered by HUD, including the Rental Assistance Demonstration Program (RAD), Section 18 Demolition and/or Disposition, RAD/Section 18 Blends, and Voluntary Conversion, from initial application to closing
- Consults on and prepares all pre-application and application components for Section 18 Demolition and/or Disposition Applications through HUD's Special Application Center (SAC), including application for Tenant Protection Vouchers (TPVs) and project-basing

Industry involvement

- National Association for Housing and Redevelopment Officials (NAHRO)
- Women in Government Relations
- Community Development Financial Institutions (CDFI) Women's Network
- Frequent speaker at national and regional affordable housing conferences, including the National Association of Housing and Redevelopment Officials, National Leased Housing Association, and National Housing & Rehabilitation Association

**Lutheran Social Services
of Wisconsin and Upper Michigan
Resume**



www.lsswis.org

HOUSING

Lutheran Social Services of Wisconsin and Upper Michigan (LSS) offers a variety of Housing Programs to fulfill our vision of healthy communities for all ages, needs and incomes.

HUD Subsidized Housing

LSS owns and manages more than 30 subsidized communities, totaling more than 425 units. Offered in cooperation with the U.S. Department of Housing and Urban Development (HUD), our developments provide safe, decent and affordable housing for older adults, and persons with developmental disabilities, chronic mental illness, or physical disabilities. We also offer HUD Property Management Services on a contract basis.

Market Rate Housing

LSS manages Eastridge Estates, a 64 unit independent living community for adults 55 and older. In addition we offer Market Rate Property Management Services on a contract basis.

Services to Persons Experiencing Homelessness

LSS is involved in a variety of services to bring individuals and families out of homelessness and into permanency in housing through Tenant Based Rental Assistance, Housing First, and Case Management Services.

Affordable Housing/Tax Credit Empowerment Services

The Low Income Housing Tax Credit Program highlights our commitment to remove barriers by providing quality, affordable rental housing. Our development partners bring the experience and resources necessary to rejuvenate existing buildings as well as develop new apartments and mixed use spaces. LSS brings development and supportive service experience as well as the ability to secure soft funds to better ensure award and ultimate success of the development.

Our developer partners benefit along with us as we work together to achieve our vision of creating healthy communities filled with people using their God-given gifts to serve.

**Service
Coordination
served**

926
**individuals
in 2018**

Service Coordination

Since 1989, LSS's service coordination program has facilitated a variety of supportive services within multi-family residential communities. Our program is designed to promote and support self-sufficiency and independence for older adults, individuals living with disabilities, and others by connecting them with necessary resources and services.

LSS Service Coordinators embody our core value; they believe in the infinite worth of every person. Based on resident interests and needs, we offer information and referral in the following empowerment areas:

- Child and Adult Education
- Financial Literacy
- Employment Services
- Health and Government Benefits

How the Service Coordination Program Helps Communities

- Decrease evictions/turnovers
- Create and enhance informal support networks
- Assist residents with disabilities/elderly/at risk to age in place
- Relieve conflicts between tenants
- Assist with residents returning home following hospital discharge
- Increase length of tenancy



STORY OF IMPACT

When Antonio reached the top of the waiting list for housing in the spring of 2017, he was hopeful that he had found a place to call home. He moved in with nothing but his clothes. Then Antonio met Kevin Windom, the on-site LSS Service Coordinator at the Hampton Regency Apartments in Butler, WI. Right away, Kevin stepped in to support Antonio and helped provide a bed, dresser and sofa, so his apartment began to feel like the home he had hoped for.

"I have lived here since March," Antonio says. "When I had problems in my housing situation, Mr. Windom helped. He was there for me."

Working onsite allows LSS Service Coordinators like Kevin to build relationships with residents, partner with staff and deliver a variety of programs to help improve the quality of life for the residents. By believing in the infinite worth of every person, LSS accompanies those we serve on their journey, showing love, dignity and respect. Together we work to build healthy communities, starting with a warm and safe home.

Partner with LSS

LSS is always looking to provide quality, supportive services to families and adults. Through service coordination and empowerment services, LSS can help decrease resident turnover and create a stronger sense of community and belonging at housing developments. To learn more about partnering visit www.lsswis.org/housing.



6737 W. Washington St. | Suite #2275 | West Allis, WI 53214 | (414) 246-2300

For more information, visit lsswis.org

**LSS empowers the people of Wisconsin and Upper Michigan
to live their best lives through ...**

A path to recovery from addiction or mental illness,
A home that's safe and affordable,
A family to thrive in,
Independence and a life that is truly their own.



COMMUNITY IMPACT REPORT 2019



Lutheran Social Services
of Wisconsin and Upper Michigan, Inc.



See how you have impacted the lives of Ashley, Nicole, Ethan and Tyler.

A PATH TO RECOVERY FROM ADDICTION OR MENTAL ILLNESS

LSS Aspen Center will serve as the first affordable and accessible residential treatment center for women in a community that currently provides 24/7 medically monitored care to men only. This means that mothers like our client Ashley, who escaped past traumas through drinking, will be able to find recovery in a place that is close to her children, workplace and the community.



A HOME THAT'S SAFE AND AFFORDABLE

In Marquette, Michigan, Nicole was nearing the end of a three-month substance use treatment program but did not have stable housing options. She was in imminent need of food, rental and utility assistance, and household items. Nicole was thankful to find LSS Rapid Rehousing program and bonded quickly with our case manager Kim Frost. Nicole worked tremendously hard and was able to achieve stability with supportive services while gaining the skills and confidence necessary to become independent and to achieve her goals.



55% of students involved with LSS School-Centered Mental Health increased their social behavior skills and 50% improved emotional regulation and reduced negative conduct incidents.



66% of at-risk families reduced barriers to adequate and stable housing, while 100% reduced healthcare services.



LSS offered onsite Service Coordination in safe, affordable and accessible homes for 2,697 residents. Over **93%** of those residents stated they remained or became connected to their community.



A FAMILY TO THRIVE IN

Ethan had spent more than half his life in out-of-home care. He had been in several homes before finding a forever family with the Marks. Ethan's life-long trauma created survival skills that meant high behavioral and mental health needs. At 16, he questioned if adoption was even what he wanted. Through ongoing support, and loving communication over time, Ethan finally felt safe in this family. Surrounded by family, friends and his teary-eyed parents, Ethan was adopted on his 17th birthday.



INDEPENDENCE AND A LIFE THAT IS TRULY THEIR OWN

Tyler has truly brought to life our vision of healthy communities filled with people using their God-given gifts to serve. A member of our Connections IRIS (I Respect, I Self-Direct) program, Tyler was born with Down Syndrome. His parents believe in their son's resilience despite his disability and lovingly set high expectations for him throughout his life. With the help of his IRIS Consultant and the support of his family, Tyler officially pitched, secured funding for, and opened his own business.

FINANCIAL OVERVIEW

Change in net assets

Revenue and Other Support

Expense

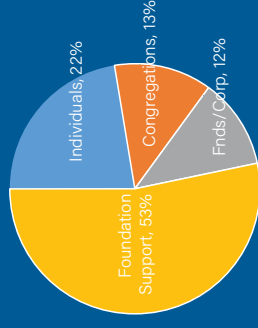
Change in Beneficial Interest from Foundation

2019

57,582,724

55,812,584

4,780,254



Sources of Contributions

Financial position

Assets

Cash and Investments

Beneficial Interest in LSS Foundation

Accounts Receivable, net

Property and Equipment, net

Prepaid and Other

162,0147

2,725,311

7,770,048

16,708,767

3,494,704

Total Assets

56,848,977

Liabilities

Accounts Payable

Accrued Expenses

Line of Credit

Debt

Total Liabilities

Net Assets

1,224,665

4,833,984

0

13,225,558

19,284,207

37,564,770

Total Liabilities and Net Assets

56,848,977

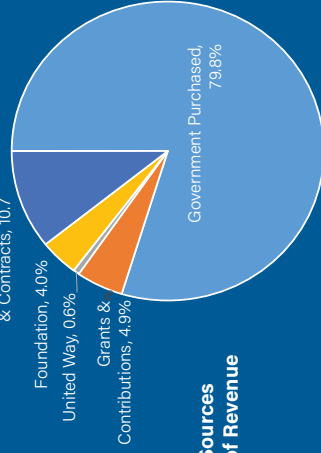
Client fees, Insurance, & Contracts, 10.7

Foundation, 4.0%

United Way, 0.6%

Grants & Contributions, 4.9%

Sources of Revenue



2019 demonstrated for LSS that there is no limit to how far the positive impact of our mission work can go.

By sharing with LSS your God-given gifts of partnership, financial support and volunteerism, we were able to serve close to 30,000 individuals - with incredible odds stacked against them - along with their families and communities.

Your personal involvement as LSS mission champions has resulted in new growth and opportunities particularly in addiction recovery, affordable housing and mental health.

Toward the middle of last year, we embarked on a \$1.7 million capital campaign for LSS Aspen Center - our 17th substance use treatment facility. In just a few short months, our generous donors contributed \$1.5 million toward our goal! Construction is now complete and we plan to move in early summer, 2020.

LSS also experienced growth through our Affordable Housing services. Serving over 550 households throughout our two-state reach, LSS worked with children, families, older adults, people with disabilities and veterans. We created communities within our subsidized apartment buildings and helped to address our clients' most critical barriers ranging from chronic mental illness, to physical and developmental disabilities.

Finally, LSS entered into a new collaboration with Marquette University and Milwaukee Public Schools. Through a newly formed MPS Success Center, our School-Centered Mental Health team offers family coaching services to students and families that are living in one of the poorest communities within our service area and are in crisis.

Family coaching continues to present an annual \$250,000 funding gap for LSS. We see the powerful outcomes for children and families and are resolute in leading an intentional effort (with several partners across Wisconsin) to gain Medicaid reimbursement for this vital service. Thank you to our most generous donors for once again rallying to secure continuation of services for the 2019/2020 school year.

*Voluntary contributions are solicited and collected from the general public via USPS, on-line, special events, and direct donor contact. This report is available on the LSS website for public access. Our most recent 990 filing is available upon request.

AT A GLANCE

27,585
individuals served

862
employees

179 volunteers
donated over
1,300
hours of time

93% of clients
said LSS
services improved their
quality of life

92%
overall client
satisfaction rate

30 board members donated
613 hours of time guiding
our work

654
communities
served



6737 W. Washington St. | Suite #2275
West Allis, WI 53214 | (414) 246-2300

For more information, visit lsswis.org

President and CEO - Héctor Colón
Chief Integration Officer - Michelle Naples
Chief Operating Officer - Joe Arzbecker
Chief Financial Officer - Randy Oleszak

Knothe & Bruce Architects, LLC
Resume

KNOTHE & BRUCE ARCHITECTS, LLC

FIRM RESUME





CONTACT INFORMATION

Address

Knothe & Bruce Architects
7601 University Avenue Ste. 201
Middleton, WI 53562

Contact

Kevin Burow

Phone

(608) 836 - 3690

Email

kburow@knothebruce.com

Website

www.knothebruce.com



DESIGN PHILOSOPHY

Knothe & Bruce is an award-winning architecture and design firm in Madison, Wisconsin. We have been involved in a wide range of multi-family projects – from historic renovations to modern mid-rise apartments, and from student housing to senior housing campuses. While most of our work is in the Madison area we also provide design solutions throughout Wisconsin, Iowa and Illinois. Regardless of the project or locale, we collaborate closely with our clients and provide a full range of residential and commercial architectural services.

Since our founding in 1974 we have diligently pursued the best designs and the highest quality construction possible. We bring nearly 40 years of experience to every project. Our 10 licensed architects and 12 staff professionals work collaboratively with our clients to enhance the design and function of the living environments we create. We understand the development realities of public approvals, market demand, and construction cost. We embrace these realities in our program and design process. We design for the market, for future residents, and for the community - not for ourselves. We consider the most important measure of our success to be the success of our clients.

Knothe & Bruce Architects prides ourselves in our ability to manage the design process and to control construction costs throughout the process. The project team has a strong understanding of construction techniques and are committed to cost control without detriment to the design, quality of construction, or program. Our extensive project experience also helps significantly in projecting costs and establishing realistic project budgets. We believe team coordination, detailed plans, and thorough review promote the ability for projects to stay in budget.

Services

Site Planning
Programming
Building Design
Space Planning
Zoning and Code Analysis
ADA Compliance
Construction Administration
LEED Documentation.

Practice Areas

Campus Student Life
Commercial
Food & Beverage
Multi-Family Housing
Office
Senior Housing

Memberships

The American Institute of Architects
US Green Building Council LEED
Construction Specification Institute
Smart Growth Madison.



DESIGN SOLUTIONS

We look forward to being part of a team of professionals that will bring thoughtful and creatively designed housing to the Madison area. With extensive experience in all types of housing, Knothe & Bruce Architects is committed to providing you with attractive, flexible, functional and innovative design solutions.

Our first step to developing a design is generating a well-defined program. This program will be determined through an evaluation of the owner's aesthetic, functional and financial requirements, the site analysis, and input from public stakeholders. With the program as our guide, we will create several concept designs for the development that will be vetted by the development team.

Based on the project schedule, the initial design process can be compressed to the extent possible so that a design may be brought into the public approval process as soon as possible. We believe that Knothe & Bruce Architects has the experience needed to shepherd your project through the City of Madison including the various neighborhood groups, City departments and committees that will be required. We have a reputation of working cooperatively with City staff and alder persons and will use that reputation and our experience to help expedite the approval process.

Knothe & Bruce Architects has been working in the housing field since the Fair Housing Act was first implemented. To ensure compliance of the Fair Housing Act and the ADA each project undergoes a strict protocol of reviews. At the design development stage, a code review is performed on the project including Fair Housing and ADA. This review may also need to account for the funding sources since additional accessibility requirements can be required based on the project financing. Knothe & Bruce Architects was instrumental in the recently approved redevelopment of the Bayview Townhomes and worked closely with all affected parties in order to create a design solution that would benefit everyone involved.



Leadership



Role
Partner

Contact
(608) 836-3690
dschroeder@knothebruce.com

Don Schroeder, AIA

Don Schroeder is a partner at Knothe & Bruce Architects, LLC and leads the design team. He earned his Bachelor of Science in Architecture from North Dakota State University. His 30 years of experiences includes thoughtful and innovative projects ranging from mixed use buildings to custom residential. He appreciates the challenges that each site brings by searching for innovative design solutions and excels at incorporating client input into a holistic design process, resulting in functional and attractive buildings.



Role
Partner

Contact
(608) 836-3690
kburow@knothebruce.com

Kevin Burow, AIA, LEED A.P.

Kevin Burow is the Managing Member of Knothe & Bruce Architects, LLC, and has over 27 years of experience designing, planning and overseeing the construction of a wide variety of project types. These include housing projects including student, multifamily and senior housing, complex commercial office buildings and office suites, health care clinics, financial institutions, educational facilities, retail stores, restaurants, and indoor water park resorts. He has done work in several different states across the country and has worked in both large and small markets. Kevin earned his Bachelor of Science in Architecture from the University of Wisconsin - Milwaukee.



Leadership



Role
Partner

Contact
(608) 836-3690
gheld@knothebruce.com

Greg Held, AIA

Greg Held is a partner and Project Architect for Knothe & Bruce Architects and is responsible for the coordination of an architectural project from design development through construction administration. He has been a member of the firm for over 28 years with involvement in many aspects of the firm's development including the planning of operating systems, design and document production methods. He has an extensive construction background and draws on those experiences to give shape to the complexities of multi-family projects. He earned his Bachelor of Science in Construction Administration from the University of Wisconsin - Platteville.



Role
Partner

Contact
(608) 836-3690
djohnson@knothebruce.com

Duane Johnson, AIA, LEED A.P.

Duane Johnson is a partner and Project Architect for Knothe & Bruce Architects and is responsible for the coordination of an architectural project from concept design through construction administration. He has over 19 years' experience with an extensive variety of project types including complex high-rise structures, mixed-used developments, commercial buildings, and dental clinics. He earned his Associates Degree in Commercial Architectural Design from Wisconsin Indianhead Technical College.



PROJECTS

While we engage with many project types, we have a long residential history. The following showcases some completed residential work.

1. The Continental

Mixed-Use

2. Block 88 Judge Doyle Square

Multi-Family

3. Royster Commons

Mixed-Use

4. The Quarry Apartments and Shoppes

Mixed-Use

5. The Lodge at Walnut Grove

Multi-Family

6. Venture

Multi-Family

7. The Waterfront

Campus Student Life

8. City View Apartments

Campus Student Life

9. Vantage Point

Campus Student Life

10. X01

Campus Student Life

11. City Row Apartments

Multi-Family

12. Grand Central Apartments

Campus Student Life

The Continental



Address

408 E Washington Ave.
Madison, WI

Mixed-Use
10 Stories
148 Units

Completion Date

Summer 2022

Project Owner

Wash Haus Development,
LLC

The Continental is a six and 10-story mixed-use building with 148 units, 1,226 square feet of commercial space, and two and one-half levels of below grade parking. The apartments are designed to meet the needs of a wide range of downtown residents with a mix of studio, one- and two-bedroom apartments. The commercial spaces are designed for neighborhood commercial or restaurant use. The U-shape building creates an interior courtyard and defines and activates the public right-of-way. The streetscapes are activated by commercial frontage, a large entry plaza, and individual unit entries. The setbacks allow for well-designed urban yards adjacent to the public sidewalk.

The building is symmetrical, composed of three bays with the outer two bays terminated by a gabled roof dormer. At the street level, the central bay features an expansive entry plaza leading to the building's main entry and lobby. The long side of the building facing East Washington Avenue is 10-stories, while the two wings are six-stories. The three separate building masses are further varied by brick color, window fenestration and architectural detail to reinforce an urban residential scale appropriate for the location. The material palette is simple and clean, using brick on the upper levels and a simulated cut limestone at the base of the building. Subtle masonry detailing accentuates the architecture throughout the façade. Although generously sized windows are used on all sides of the building, large glass expanses and curtain walls are avoided in favor of traditional punched window openings.

Block 88 Judge Doyle Square



Address

216 S Pickney St.
Madison, WI

Multi-Family
9 Stories
162 Units

Completion Date

Summer 2021

Project Owner

Stonehouse Development,
Inc.

The project is the development of the podium and air-rights on Block 88. It consists of an additional 162 apartment units in nine stories on top of the existing 4-story podium of the recently completed parking garage located at 216 S Pinckney St. Over 3,200 square feet has been added to the fifth level floor plate, and 1,550 square feet added to the typical floor plate above. This addition was done to maximize the number of units without negatively impacting the podium.

The building's form maintains the curve on the MLK side of the building and a rectilinear façade faces the Madison Municipal Building, which better relates to the city grid and adjacent buildings. The lightweight facade system is composed of two types of metal panels with punched windows. The brick at the core and corners add a balance to the metal materials and anchor the building to the site. Solid materials add architectural interest, texture and scale to the facades while making the building more energy efficient and bird friendly. The basic massing of the building steps down, and reduces in scale, towards the MMB. The top floor of the apartment tower is stepped back to create a terrace and a top to the building. Mechanical equipment is located on the roof and is either enclosed or screened. A green roof and Madison's first blue roof are located on the southwest side towards the MMB.

This project was completed in partnership with Potter Lawson.

Royster Commons



Address

523 Grand Oak Trail
Madison, WI 53714

4 stories
195,165 sq.ft.
89 units

Completion Date

2019

Project Owner

Ruedebush Development

Royster Commons offers a range of unit types in addition to 40,000 sq.ft. of first floor commercial space. It is the new home of the Pinney Library. The building facades include changes in color, texture and high-quality materials in a combination of masonry and metal paneling with a cast stone base. Royster Commons maintains the orderly development pattern set by the neighborhood plan while finding a unique way to activate and enhance the growing community.

The Quarry Apartments and Shoppes



Address

2901 University Ave.
Madison, WI 53703

5 stories
90,913 sq.ft.
52 units

Completion Date

2019

Project Owner

Flad Development

This mixed-use development consists of 10,700 square feet of retail space and 52 apartments, with parking for over 110 cars on two levels. The main building is set into the sloped grade alongside University Avenue, with a two-story townhome building on Harvey Street and a five-story mixed-use building with the front facade on University Avenue. This grade transition is further emphasized with changing facade material, from stone to brick to horizontal siding. The public space is defined by a crescent partition wall facing University Avenue, inviting visitors into the public plaza and adjacent commercial spaces. Outdoor seating in the plaza space activates the University Avenue frontage, while the open space is continued in the elevation with private balconies articulating the front facade.

The Lodge at Walnut Grove



Address

4200 University Ave.
Madison, WI 53705

4 stories
101,273 sq.ft.
100 units

Completion Date

2017

Project Owner

Flad Development &
Investment Corp.

The Lodge exteriors are designed to evoke the character of a contemporary lodge with extensive areas of locally quarried natural stone, punctuated with large windows providing views of the surrounding area. The building walls are highly articulated, bringing visual interest to the facades and privacy to the patios and balconies. The Lodge atmosphere is enhanced by the natural wood front entry doors and barrel-vaulted canopies supported by natural stone pillars with heavy wood timber columns and braces.

The exterior character extends into the interior with natural stone in the lobbies and the community room. The community room is warm and inviting with a wood beamed ceiling and natural stone fireplace. Beyond the community room, residents can enjoy the exterior courtyard with comfortable seating, a fire pit, and a water feature.

The Lodge features a mix of studio, one-bedroom, and two-bedroom luxury apartments distributed between four buildings constructed in two phases. The floor plans are open and contemporary, and are complemented by modern, upscale quality appliances and energy efficient heating and cooling equipment.

The Waterfront



Address

633 N Henry St.
Madison, WI 53703

6 stories
119,301 sq.ft.
71 new units
37 renovated units

Completion Date

2014

Project Owner

JCH Properties

Designed in the Langdon Neighborhood, the Waterfront redevelopment includes two existing and one new building. The new, primary building blends modern housing with the surrounding historic district. It provides underground parking for cars, bikes and mopeds, energy efficient and green building techniques, several levels of rooftop terraces, and carefully designed street level massing.

Renovating the existing 37-unit Cliff Dwellers building included front facade upgrades and adding a defined entrance. The existing through-the-wall air conditioning sleeves were removed and replaced with a concealed system. The rear facade and balcony were replaced with a lighter glass facade and French balconies. Interior renovations included all new floors, plumbing fixtures, wall finishes, lighting, cabinetry, and counter tops. The second renovation targeted both exterior facades and interior improvements at the historic 150 Langdon. The exterior masonry was cleaned and tuck-pointed, windows repaired, and the original entries and window openings re-installed. Interior renovations included new floor and wall finishes, replacement of inappropriate doors, casing and trim, and restoration of the entry and entry stairway.

Vantage Point



Address

1323 W. Dayton St.
Madison, WI 53715

8 stories
76,803 sq.ft.
65 units

Completion Date

2013

Project Owner

Stoddard Arms, LLP

Vantage Point responds to the surrounding urban context, defined by a mix of educational and residential spaces. The well-detailed exterior uses a combination of brick, metal siding and composite metal siding to reflect the residential use and institutional setting. Each apartment unit has a private patio or balcony, and the building offers one and a half lower parking levels. A penthouse common room and roof terrace sits above the eighth level to provide a space of respite and community to residents while offering expansive views of Camp Randall, the University of Wisconsin, and the State Capitol. Not only does the development offer private outdoor space, but it also provides public outdoor space for both residents and guests to enjoy. The large entry plaza along Dayton Street emphasizes the connectivity between the building and street scape.



Address

1001 University Ave.
Madison, WI 53715

8 stories
90,668 sq.ft.
79 units

Completion Date

2013

Project Owner

LZ Ventures

Nestled within the bustle of Madison and the University of Wisconsin campus, XO1 offers student housing blended with Madison's history. It offers one- to five-bedroom apartment units for students to call home. This development included the relocation and preservation of the 1930's masonry chapel, St. Francis House. By relocating the historic building just to the west of the development, the site offers a blend of history, religion, academia, and urban life for students and the public to enjoy. It ties together a variety of architectural styles and remains sensitive to the solar impacts and sight lines to the church, bell tower, and surrounding context.

The building is a post-tensioned concrete structure with two levels of under-building parking. The contemporary exterior skin is a combination of stone, metal panels, and spandrel glazing. Metal balconies and railings articulate the facade and create usable open space for the residents.

City Row Apartments



Address

614 E. Johnson St.
Madison, WI 53703

3 stories
88652 sq.ft.
83 units


Completion Date

2010

Project Owner

Stone House
Development

The first WHEDA project in the state of Wisconsin to utilize TCAP funds, City Row provides multi-family housing through the selective demolition of townhomes and apartments on the urban site to create meaningful new residences. The individual two- or three-bedroom townhomes welcome residents with generous porches that emphasize the pedestrian level of the street. This pedestrian level extends to the central courtyard. Hardscaped to allow for intensive use in all seasonal conditions, the courtyard is surrounded by landscape lawns that are not only visually pleasing but aid in storm water management. A community building also provides a common room that opens onto the central courtyard. Terraced gardens are in the heart of the courtyard, providing both management-maintained and tenant-maintained garden plots. A certified Green Build Home and the first Energy Star qualified multi-family high-rise building in Wisconsin, City Row has become an integral precedent for dignified housing in the City of Madison.

The background features large, stylized, light blue letters 'Kno' that are partially cut off by the edges of the page. The 'K' is on the left, the 'n' is in the center, and the 'o' is on the right. They are set against a light gray background with a vertical white stripe running down the center.

Knothe & Bruce Architects
7601 University Avenue Ste 201
Middleton, WI 53562

(608) 836 - 3690
info@knothebruce.com
www.knothebruce.com

Vierbicher Resume



Description of Firm



EXACT SCIENCES DISCOVERY CAMPUS, IMAGE PROVIDED COURTESY OF FINDORFF

Vision to Reality

Vierbicher is a community planning and civil engineering firm that has become a proven partner for thriving Wisconsin communities and developers. Our extensive experience working with both public and private clients has earned us the reputation as a trusted advisor and a firm that brings vision to reality.

Clients choose Vierbicher because we get projects done. While our core service is civil engineering, our extensive due diligence, market-based approach and public funding expertise have made us an industry leader with unmatched success rates.

In addition, our wide range of work with both public and private clients has uniquely positioned us to bring added value by connecting developers to community projects.

We pride ourselves on long-term client relationships, many spanning decades. Our multi-disciplined team of experts works collaboratively and efficiently from concept to completion to accomplish client goals on time and on budget.



INTEGRATED SERVICES

- Planning & Community Development
- Economic Development
- Urban Design & Landscape Architecture
- Grant Writing & TIF
- Municipal Engineering
- Civil Engineering
- Surveying & GIS
- Water Resources Engineering



Firm Profile: Services & Specialties



INTEGRATED SERVICES

Vierbicher's multi-disciplined capability and team approach enables us to combine the essential areas of expertise required to successfully complete projects. Having this broad range of in-house experience provides our clients with creative solutions, improved project coordination, greater efficiency, and cost-effective results.

PLANNING & COMMUNITY DEVELOPMENT

- Comprehensive Planning
- Neighborhood Planning
- Urban Redevelopment Planning
- Outdoor Recreation Planning
- Public Facilitation
- Impact Fee Planning
- Developer Representation
- Ordinances & Regulations

ECONOMIC DEVELOPMENT

- Business/Industrial Parks
- Targeted Industry Studies
- Tax Incremental Financing (TIF)
- Market Analysis
- Strategic Planning
- Fiscal & Economic Impact Analysis
- Grant Writing & Administration
- Business Recruitment/Expansion

URBAN DESIGN & LANDSCAPE ARCHITECTURE

- Concept Planning
- Illustrations & Renderings
- Park & Plaza Design
- Landscaping Plans
- Streetscape Design
- Bike & Pedestrian Trails

MUNICIPAL & CIVIL ENGINEERING

- Municipal Infrastructure Design & Studies
- Streets & Roadways
- Site Development
- Stormwater Systems
- Water Supply & Distribution Systems
- Wastewater Treatment & Collection Systems
- Construction Observation & Administration

SURVEYING & GIS

- CSMs, Boundary Surveys and Legal Descriptions
- Platting: Subdivision/Condominium/Assessor's/Right-of-Way
- Topographic Surveys/Aerial Mapping Control
- Construction Staking
- Easement Mapping & Descriptions
- Parcel/Utility Mapping
- Floodplain Surveys/FEMA Elevation Certificates
- Geographic Information Systems (GIS)

WATER & ENVIRONMENTAL RESOURCES

- Floodplain Analysis
- Stormwater & Water Quality Management
- Environmental Assessments
- Regulatory Compliance & Permitting
- Wetland Management



Civil Engineering



UPTOWN, FITCHBURG, WI

Smart solutions for high-quality real estate development

Quality civil engineering results in efficient and effective design that helps projects stay on schedule and on budget. At Vierbicher, we've worked for more than 40 years with both public and private clients on a wide range of project types. We're known for seamlessly delivering results, whether a site is one acre or 1,000 acres.

Our multi-disciplined team of experts gets the job done right, because we understand how municipalities and private developers think and operate. We use our extensive experience and knowledge of planning, surveying, water resources and site analysis to transform site constraints into opportunities.

As a trusted partner, we take the time to understand our clients' goals, integrate their feedback into comprehensive plans and think critically about how to best execute what they're looking for.



X01 UNIVERSITY AVE., MADISON, WI

INTEGRATED SERVICES

- Municipal Engineering
- Construction Oversight
- Site Development
- Stormwater Management
- Water Systems
- Sewerage Systems
- Business & Industrial Parks
- Recreation Facilities
- Greenfield Development
- Urban Redevelopment



Planning and Community Development



VILLAGE OF SHOREWOOD HILLS, WI

Market-based planning, reality-based implementation

Vierbicher is an industry leader in planning and community development services. We don't just deliver pretty pictures, we bring your vision to life. We're known for our realistic plans that are developed based on analysis and local stories to ensure feasible, market-supported results.

We've partnered with forward-thinking Wisconsin towns, villages, cities and counties—some for decades—to develop plans that address each one's unique long-term needs. We work closely with our clients to develop comprehensive plans that strike a delicate balance: they meet goals, but they're realistic; they consider public input and state law requirements, but don't lose sight of long-term visions.

Best of all, our plans improve your local quality of life. We can take care of everything from grant writing, market analysis and drafting concepts all the way to completion. You can count on us to deliver results that will spur a healthier economic outlook for your community.

PROJECT TYPES: COMMUNITY DEVELOPMENT

- Mixed-Use Developments
- Corridor and Downtown Revitalization
- Residential Development
- Brownfield Development
- Parks and Recreation Facilities
- Business and Industrial Parks

PROJECT TYPES: PLANNING

- Market Analysis (commercial, retail, housing)
- Grant Writing
- Comprehensive Plans
- Strategic Area, Corridor and Neighborhood Plans
- Redevelopment Plans
- Development Impact Analysis
- Ordinance and Zoning Administration



Landscape Architecture



EG KROMREY MIDDLE SCHOOL, MIDDLETON, WI

We make spaces more livable and beautiful

At Vierbicher, we take the functional and make it beautiful. We're the creative partner you can trust to make your development or municipality a better place to live.

Our team of experts listens to your concerns, needs and goals before designing an outdoor environment that works in tandem with your buildings, roads, and storm water management systems.

We are known for assessments and strategies that can incorporate site constraints, historical context and public input. We also offer the expertise and support you may need during the bidding and construction phases. No matter how simple or complex, the end result is always the same: a more aesthetically pleasing environment.



SHOREWOOD HILLS, WI

PROJECT TYPES

- Streetscaping
- Recreational Facilities
- Sports Fields/Courts
- Stormwater Ponds, Rain Gardens, Fountains
- Building Landscape Plans
- Private Subdivision Open Space Landscaping



Corridor & Downtown Revitalization



DOWNTOWN STOUGHTON, WI

Creating healthy and vibrant communities

A healthy downtown or a vibrant corridor is a symbol of community pride and history. These corridors are directly linked to job creation, reduction of sprawl, tourism, and economic prosperity. Community support and planning are key elements in successful revitalization efforts in addition to a comprehensive planning approach.

Vierbicher has worked with communities of all sizes throughout the state to plan for and implement revitalization plans that promote economic development. Our market-based approach helps to ensure that planning is based in reality and is able to fluctuate with market conditions, thereby creating flexibility and promoting implementation.

Vierbicher's services include a full range of activities required to effectively plan and implement a successful program, including: planning, community development, landscape architecture and urban design, engineering, and surveying.



MARKET-BASED APPROACH

PROJECT TYPES

- Acquisition/Relocation
- Brownfield Development
- Business Improvement Districts
- Grant Application & Administration
- Historic Preservation
- Infrastructure Engineering
- Market Analysis
- Parking & Traffic Studies
- Public Involvement
- Redevelopment Districts
- Redevelopment Plans
- Streetscape Design
- Tax Incremental Financing



Stoughton Planning & Economic Development



LOCATION

City of Stoughton, WI

PROJECT SERVICES

- Economic Development
- Landscape Architecture & Urban Design
- Civil Engineering
- Surveying & GIS
- Water & Environmental Resources
- Permitting

Known for its Norwegian heritage, downtown Stoughton hosts an eclectic mix of uses including the Stoughton Opera House, boutique shopping, unique restaurants, as well as City services. USH 51 serves as Main Street through the downtown, and is a Major Collector through the City.

The multi-year reconstruction of Main Street was completed over three phases. Close coordination between the City and businesses was critical during design and construction. Detailed traffic control plans and construction staging were completed to minimize disruption to local businesses.

Important to the reconstruction process was design of the human spaces. Substantial attention was given to design of the sidewalks, crosswalks, and street furniture to contribute to an overall consistent downtown aesthetic.

The reconstruction of the street and utilities occurred over a three year period. Project activities included:

- Replacement of Sanitary Sewer Main and Laterals
- Replacement of Water Main and Services
- Replacement of Storm Sewer
- Reconstruction of Street and Sidewalk
- Decorative Sidewalks and Crosswalks
- Traffic Signals
- Historic Street Lights
- Streetscape





The Depot Apartments



CLIENT

The Depot Apartments, LLC

LOCATION

City of Madison

PROJECT SERVICES

- Civil Engineering
- Surveying

The Depot Apartments is a redevelopment project in the Bassett neighborhood district of Madison near the UW-Madison campus. This project required demolition of a bus depot and parking area and construction of three linked buildings that line the edges of the site and contain an internal surface parking area. The finished building contains 11,000 sf of retail space, 82 apartment units and 26 surface and 96 underground parking stalls.

The proximity of the site to other large warehouse buildings and the City's requirement to position the buildings close together and close to the street required careful consideration of access points and stormwater management. Accessible transitions from the adjacent City Street to the parking entrances and to the retail space were critical. Surface parking is positioned above the underground parking at street level. This requires collecting stormwater in multiple small inlets installed within the parking structure and piping it through the structural support system to the public storm sewer.



XO1 University Avenue



LOCATION

City of Madison

CLIENT

LZ Ventures, LLC

PROJECT SERVICES

- Civil Engineering
- Surveying

Construction of this 90-unit apartment building, which was approved by the City of Madison in 2011, required substantial coordination with City staff and Commissions. At the time of application, the site was home to the St. Francis House, a church-based student center originally constructed in 1929. To make way for the redevelopment project, a portion of the original structure was relocated within the site.

Located on University Avenue, the structure is eight stories at its tallest point and includes underground parking and a variety of unit types. The design of the building is sensitive to surrounding context and steps down in height towards University Avenue and the adjacent Luther Memorial Church, and as low as four stories in other locations.





PROJECT PRINCIPAL

David M. Glusick, PE



EDUCATION

B.S. Civil Engineering (1995)
University of Wisconsin-Madison

M.B.A. (2013)
University of Wisconsin-Madison

PROFESSIONAL EXPERIENCE

Vierbicher

Principal (2010)
Board of Directors (2011)
Treasurer (2018)

I&S Group, Inc.
Principal (2009)

Calkins Engineering, LLC
Principal/Owner (1999)

REGISTRATIONS & CERTIFICATIONS

Licensed Professional Engineer -
Wisconsin

PROFESSIONAL AFFILIATIONS

Metropolitan Builders Association

Capstone Program Mentor - UW
Madison, Multiple Semesters

Smart Growth Greater Madison
Board of Directors, Executive
Committee, President

Downtown Madison, Inc.

NAIOP - Commercial Real Estate
Development Association

BACKGROUND & ROLE

Dave has over 25 years of experience providing engineering and construction services on commercial and residential land development projects. He also manages Vierbicher's Madison and Milwaukee offices. His background in civil engineering allows him to understand the needs of a site in the early stages of a project. His management experience allows him to assemble the optimal team for a project. He is a trusted resource and partner to the clients that he works with.

PROJECT EXPERIENCE

Master Planned Developments

- Sand Valley Golf Resort, Adams County, WI
- Exact Sciences, City of Madison, WI
- Uptown, City of Fitchburg, WI
- Fitchburg Technology Campus, City of Fitchburg, WI
- Prestwick Group - La Belle Golf Club, Village of Lac La Belle, WI
- North Park, City of Fitchburg, WI

Site Development

- The Quarry, City of Madison, WI
- The Lodge, Village of Shorewood Hills, WI
- The Lyric, City of Madison, WI
- The Foundry, City of Middleton, WI
- Grand Central Place, City of Madison, WI
- X01, City of Madison, WI
- Deco, City of Madison, WI
- Brownpoint Reserve, City of Middleton, WI
- Hy Cite Corporate Headquarters, City of Middleton, WI
- Ronald McDonald House, Village of Shorewood Hills, WI
- The Current, City of Monona, WI
- The Waterfront Apartments, City of Madison, WI
- Vantage Point Apartments, City of Madison, WI
- Riva Apartments, City of Fitchburg, WI
- Prima Apartments, City of Fitchburg, WI
- The Addison, City of Fitchburg, WI

Residential Neighborhood Development

- Carriage Ridge Estates, Town of Westport, WI
- Hawk's Woods Estates, City of Madison, WI
- Ironwood Estates, City of Sun Prairie, WI
- Wolf Hollow, Town of Windsor, WI
- Bentley Green Condominiums, City of Madison, WI
- Uptown Village, City of Fitchburg, WI
- Habitat for Humanity, Multiple Sites, WI



PROFESSIONAL LAND SURVEYOR

Michael S. Marty, PLS



BACKGROUND & ROLE

Michael is a Wisconsin Professional Land Surveyor with over 26 years of experience providing land surveying services and project management for a variety of surveying and mapping projects. Over his career, Michael has prepared over 640 surveys in Dane County alone. Mike's experience includes Subdivision Plats, Assessor's Plats, Condominium Plats, Certified Survey Maps, Expanded Certified Survey Maps, ALTA/NSPS Land Title Survey Maps, Plats of Surveys, As-Built Surveys, Elevation Certificates, Boundary & Topographic Survey Maps, Section Corner Monument Survey Maps, Control Surveys, Concept Layout Maps and projects involving WHEDA financing.

Michael has presented before the State Bar for attorneys on the surveyor's role in locating land boundaries. In 2016 Michael also presented before numerous law firms in the Madison area and on-line through other branch offices regarding the changes to ALTA Survey Standards.

EDUCATION

B.S. Civil Engineering (1996)
University of Minnesota-
Minneapolis

B.A. Physics (1993)
Luther College, Decorah, IA

PROFESSIONAL EXPERIENCE

Vierbicher
Project Leader (2013)
Professional Land Surveyor
(2010)

I & S Group, Inc.
Madison Office Land Survey
Manager (2009)

Calkins Engineering, LLC
Professional Land Surveyor
(2005)

Burse Surveying & Engineering
Professional Land Surveyor
(2001)

Mayo Corporation
Professional Land Surveyor
(1995)

REGISTRATIONS & CERTIFICATIONS

Wisconsin Professional Land
Survey #2452 – Wisconsin (1999)

PROFESSIONAL AFFILIATIONS

Wisconsin Society of Land
Surveyors

PROJECT EXPERIENCE

Plats

- Conservancy Bend, City of Middleton, WI
- Sand Valley Golf Resort Development, City of Nekoosa, WI
- Highland Village to Cottage Grove, Cottage Grove, WI
- Wolf Hollow at Pleasant Prairie Creek, Village of Windsor, WI
- Nine Springs Development, City of Fitchburg, WI
- Ironwood Estates, City of Sun Prairie, WI
- Assessor's Plat of Borchers Beach, Town of Westport, WI

Condominium Plats

- 1050 Condo (Lyric II & Madison Youth Arts Center), City of Madison, WI
- Block 88 Condominium (Judge Doyle Square), City of Madison, WI
- Fair Oaks Condominium, City of Madison, WI
- Bentley Green Condominiums, City of Madison, WI
- Aspen Commons Commercial Condominium, City of Middleton, WI

Certified Survey Maps

- Ronald McDonald House Charities, Village of Shorewood Hills, WI
- The Limerick, City of Fitchburg, WI
- The Hamptons, City of Madison, WI
- The Continental, City of Madison, WI
- Tailor Place Apartments, City of Madison, WI
- The Overlook at Hilldale, City of Madison, WI
- A Home of Our Own, Village of New Glarus, WI

Expanded Certified Survey Maps

- Dunes Loft, Crenshaw Cabin, Sandbox Loft, Biarritz Lodge, Dunes Lodge, Fairway Lodge, Leopold Cottages at Sand Valley Golf Resort, Nekoosa, WI

ALTA/NSPS Land Title Surveys

- Venture, City of Madison, WI
- NOVO, City of Madison, WI
- Pyare Lodge, Village of Shorewood Hills, WI



LANDSCAPE ARCHITECT

Suzanne M. Vincent, PLA



BACKGROUND & ROLE

Suzanne plays a critical role in the creative development of projects through her landscape architecture and graphic design abilities. She has been involved in a wide range of both public and private projects, from site landscape designs to neighborhood plans and downtown revitalization projects. Suzanne works collaboratively with engineering and planning groups throughout the design process, from site analysis to creative problem solving and project documentation. With such extensive experience in a wide variety of project types, Suzanne excels at understanding how to successfully address challenges in a forward-thinking, yet cost-effective manner.

PROJECT EXPERIENCE

EDUCATION

University of Wisconsin –
Madison
Bachelor of Landscape
Architecture (2007)

PROFESSIONAL EXPERIENCE

Vierbicher
Landscape Architect (2007)

REGISTRATIONS, CERTIFICATIONS, TRAINING, AND CONTINUING EDUCATION

Wisconsin Registered
Landscape Architect #620

PROFESSIONAL AFFILIATIONS

American Society of
Landscape Architects (ASLA)

WIASLA - Wisconsin Chapter
Executive Committee 2012 -
2019

Rooftop Amenity Space

- Garver Point Apartments, City of Madison, WI
- Terrace Point Apartments, City of Fitchburg, WI

Master Site Plans

- Exact Sciences Discovery Campus, City of Madison, WI
- Community of Bishop's Bay, Town of Westport, WI
- Stoughton Riverfront Redevelopment Planning, City of Stoughton, WI

Site Design

- Wisconsin Historical Society - Villa Louis Walkway Replacement, Prairie du Chien, WI
- Gebhardt Building/Sylvee Theater, City of Madison, WI
- Kromrey Middle School Landscape, Middleton-Cross Plains Area School District, City of Middleton, WI
- Home2 Suites by Hilton, City of Madison, WI

Streetscaping

- Fish Hatchery Road, City Fitchburg, WI
- Marshall Court, Village of Shorewood Hills, WI
- Rhinelander Downtown Streetscape, City of Rhinelander, WI

Parks & Recreation

- Heiden Haus Renovation, Village of Shorewood Hills, WI
- Nine Springs Neighborhood Park Planning, City of Fitchburg, WI
- Post Farm Park Enhancement, Village of Shorewood Hills, WI

Municipal Master Planning

- City of Rhinelander Downtown Economic Development & Streetscape Master Plan
- Sheboygan Harbor Centre Master Plan
- Centennial Centre Master Plan, Village of Hobart, WI
- Gays Mills Community Relocation Planning, Village of Gays Mills, WI
- Village Center Planning, Village of Harrison, WI



PROJECT
LEADER

Justin Zampardi, PE, LEED-AP



EDUCATION

B.S. Civil Engineering (2001)
University of Wisconsin
Platteville

PROFESSIONAL EXPERIENCE

Vierbicher
Project Engineer(2017)

EMH&T
Project Manager (2013)

Mead & Hunt, Inc.
Civil CAD Manager (2009)

Erdman Company
Project Engineer-Civil (2001)

PROFESSIONAL AFFILIATIONS
Licensed Professional Engineer
-Wisconsin

LEED Accredited Professional

Autodesk Civil 3D Certified

Autodesk AutoCAD Certified

BACKGROUND & ROLE

Justin has over 20 years of experience in Civil Engineering. He has managed site development for single, multi-family, commercial and industrial projects. Working closely with clients to manage and maintain efficiencies to build and maintain relationships is of utmost importance. He has a wide array of experience and services including: site development, manage projects, identify and design scope of work, CAD expert to implement accurate and efficient plans for ongoing projects, designed and engineered stormwater, water distribution, and sanitary sewer collection systems.

Justin earned his LEED-AP certification in 2007. He has an in-depth knowledge of green building and sustainable practices that can be integrated into the design and construction of a project.

PROJECT EXPERIENCE

Master Planned Developments

- Exact Sciences, Madison, WI

Site Developments

- 700 East Johnson Street, Madison, WI
- Esker Apartments, Madison, WI
- Home Of Our Own, New Glarus, WI
- Moka Coffee, Madison, WI
- Peloton Residences, Madison, WI
- The Hamptons Apartments, Madison, WI
- The Lyric, Phase 2, Madison, WI
- The Quarry, Madison, WI
- Timber Valley Apartments, Madison, WI

Residential Developments

- Ninth Addition to Blackhawk Subdivision, Madison, WI

Northcentral Resume

NORTH CENTRAL



A BETTER construction EXPERIENCE
results in HAPPIER construction
clients. It's simple.
It's Straightforward.
But for over 30 years, it's proven to
make a truckload of sense.

Design Build
General Contractor
Construction Manager



Specializing In

- Hospitality
- Commercial
- Senior Living
- Rehabilitation
- Restaurants
- Multi-Family
- CBRF's & RCAC's
- Retail
- Tax Credit
- Historic Rehab

A BETTER CONSTRUCTION EXPERIENCE

(920) 929-9400

NCCBUILDS.COM



Thru today Northcentral has completed 170 Tax Credit Projects in 4 states comprised of 486 buildings and 6,586 units. The following includes a partial list of multifamily projects that Northcentral Construction has completed: **Jobs in RED involved HUD and Section 3 Funding**

69 units- Crescent Lofts, Appleton, WI
64 units- Sheboygan Falls School & Townhomes,
Sheboygan Falls, WI

220 units- Ridgedale, Milwaukee, WI

40 units- Regency, Little Chute, WI
44 units- Century Building, Milwaukee, WI
40 units- Cranberry Woods, Wisconsin Rapids, WI
73 units- Parkview, Caledonia, WI
28 units- Whispering Echoes, Winneconne, WI
18 units- Nekoosa Senior Living, Nekoosa, WI
32 units- Bayshore Townhomes, Sparta, WI
30 unit- CenterPoint Apartments, Cedar Rapids, IA
30 units- Creekside Apartments, Cedar Rapids, IA
72 units- Tennyson Ridge, Madison, WI
28 units- Colby Cottages, Colby, WI
55 units- Shoe Factory Lofts, Milwaukee, WI
60 units- Woolen Mills Lofts, Appleton, WI
80 units- Lakeside Gardens, Fond du Lac, WI
24 units- Brillion Townhomes, Brillion, WI
64 units- Kingston Village, Cedar Rapids, IA
40 units- Rivers II, Oshkosh, WI

161 units- Eastland, Evansville, IN

276 units- Fairview, Lake Charles, LA

128 Units- Ridgcrest, Madison, WI

60 Units- Nicolet Townhomes, De Pere, WI
20 Units- Peebles Commons, Peebles, WI
24 Units- Blackstone Harbor, Sister Bay, WI
55 Units- Oconomowoc School Apartments-
Oconomowoc, WI
62 Units- Cornerstone Commons- Des Moines, IA
24 Units- Kenwood Commons- Ripon, WI
24 Units- Waupaca Townhomes- Waupaca, WI

48 Units- Park Place Apartments- Reedsburg, WI
80 Units- Becher Terrace- Milwaukee, WI
66 Units- Buchanan Cottages- Buchanan, WI
89 Units- Harborside Commons- Kenosha, WI
60 Units- The Rivers- Oshkosh, WI
24 Units- Mauston Senior Village- Mauston, WI
24 Units- Berlin Senior Village- Berlin, WI
24 Units- Blackstone Harbor- Sister Bay, WI
62 Units- Madison Place- Beaver Dam, WI
35 Units- Fountains of West Allis, West Allis, WI
55 Units- Fair Acres Townhomes- Oshkosh, WI
24 Units- Seymour Senior Village- Seymour, WI
50 Units- Nicolet Townhomes- De Pere, WI
24 Units- Bayside Senior Village- Oconto, WI
150 Units- Ridgewood Apartments- Milwaukee, WI
150 Units- Westridge Apartments- Milwaukee, WI
24 Units- Colby/Abbotsford Senior Village- Colby, WI
24 Units- Weyauwega Senior Village- Weyauwega, WI
60 Units- Clarke Square Terrace- Milwaukee, WI
80 Units- Garden Terrace- Milwaukee, WI
64 Units- Garden Place RCAC- Milwaukee, WI
24 Units- Wolf River Senior Village- Manawa, WI
24 Units- Kewaunee Senior Village- Kewaunee, WI
82 Units- Chateau Gardens- Fond du Lac, WI
43 Units- Orchard Ridge- Ashwaubenon, WI
207 Units White Birch II- Milwaukee, WI
151 Units White Birch I- Milwaukee, WI
72 Units- Courtyard of Willow Woods, Tomah, WI
120 Units Woodside Terrace, Beloit, WI
45 Units- Village Green East, Two Rivers, WI
48 Units- Village Green West, Two Rivers, WI

Our motto "A BETTER CONSTRUCTION EXPERIENCE" came from the developers, subs and employees who are, and have been, part of our team. We take steps at every part of the process to make sure that your project meets and exceeds your expectations. We look beyond plans and specs and determine what it will take to make your project vision a reality.

Northcentral Construction has a proven record of partnering with Developers early to prepare realistic budgets that hold up during construction. We deliver thoughtfully designed, thoroughly planned, and efficiently managed projects. With our team a project manager oversees each project, and a full time Site Manager coordinates the daily jobsite activities.

Northcentral Construction is known for completing our projects on schedule and within budget, avoiding budget overruns. We have an excellent safety record and have clean, safe productive worksites. We have over 40 trade professionals on staff and can perform rough and finish carpentry as well as concrete walls, slabs and site concrete as needed. This in house staff is key to our ability to keep schedules and delivery top quality projects.



Krupp General Contractors, LLC Resume

KRUPP GENERAL CONTRACTORS, LLC

HISTORY

Established in 1976, Krupp General Contractors, LLC (Krupp) is a mid-size commercial general contractor providing construction services to clients engaged in a wide range of businesses and industries.

Primary areas of focus are commercial and large-scale residential projects including single and multi-tenant offices, financial institutions, hospital and bio-sciences, scientific, health care clinics, dental clinics, community based residential care facilities and the full spectrum of multi-family housing projects including market rate apartments, senior housing (independent living and campus type care facilities), mixed-use and affordable. Additionally, the company constructs warehouse and manufacturing facilities.

Krupp provides construction administration, project management and development coordination services to clients with construction and development needs. The firm is positioned to offer a broad scope of services that are distinct from the traditional general contractor based on its internal structure and expertise within the organization. By utilizing a construction management model of project delivery, the management team has developed a proven successful approach by expanding the role and services provided as a member of the project team, resulting in an integrated, efficient and cost-effective design and construction process.

The company only employs its own staff for project management, job site supervision, controlling the delivery of key aspects of the construction process. This approach and philosophy has evolved from hands on experience gained by the owner/management team through the successful turnkey development of projects constructed by the firm.

The company operates from corporate offices located at 749 University Row, Suite 101, Madison, Wisconsin and currently has thirty-five employees performing management, administration, supervision and some carpentry labor for its ongoing construction projects.