

TRIANGLE REDEVELOPMENT PARTNERSHIP



Statement of Qualifications



DATE PREPARED

August 27, 2021

ADDRESS

New Year Investments
1021 South Park Street, Suite A
Madison, WI 53715

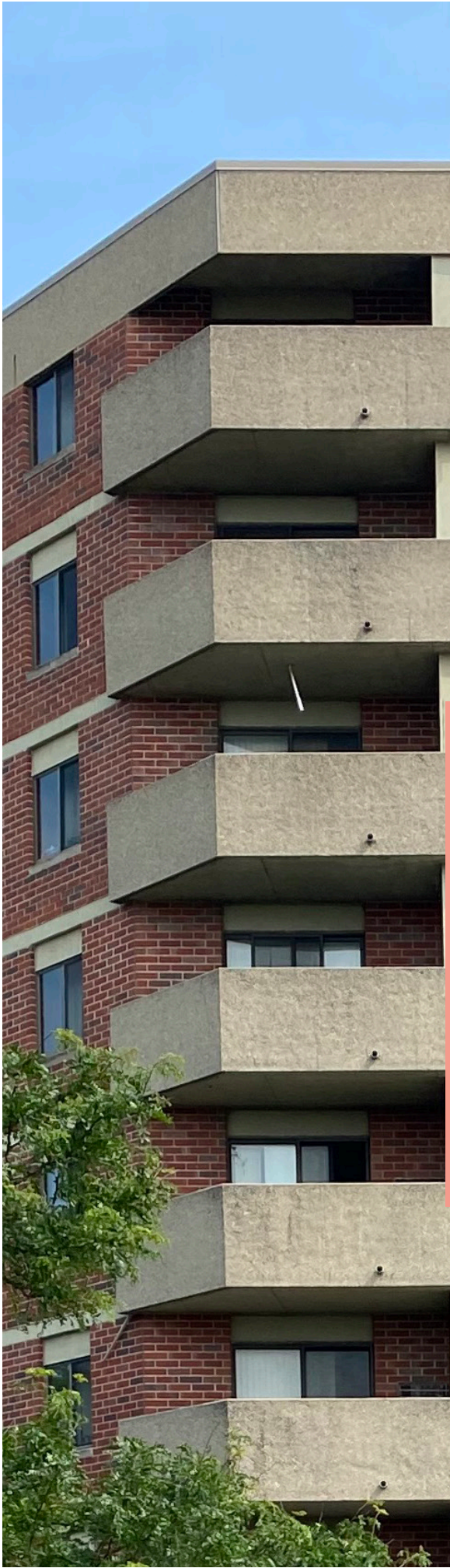


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Dear Committee:

Thank you for the opportunity to submit our qualifications for this historic project. With careful consideration of the RFQ, coupled with our current understanding of the community, we formed a team with the dedication, experience, and values necessary to lead this long-term project.

DEVELOPMENT PARTNER (TEAM LEAD)

New Year Investments (WBE)
1021 South Park Street, Ste A
Madison, WI 53715
P: 608.285.5029
E: sarah@newyearinvestments.com

COMMUNITY ENGAGEMENT EXPERT & EQUITY CONSULTANT

EQT by Design (WBE and MBE)
6709 Raymond Road
Madison, WI 53719
P: 608.371.9527
E: annette@eqtdesign.com

ARCHITECTURE AND PLANNING

Potter Lawson (WBE)
749 University Row Unit 300
Madison, WI 53705
P: 608.212.8569
E: rebeccap@potterlawson.com

LANDSCAPE ARCHITECTURE & SUSTAINABLE SITE DESIGN

Saiki Design (MBE)
1110 South Park Street
Madison, WI 53715
P: 608.405.8149
E: amoiien@saiki.design

HUD, LIHTC & FINANCING

Baker Tilly
4807 Innovate Lane
Madison, WI 53718
P: 608.240.2643 ext 4807
E: donald.bernards@bakertilly.com

Dedicated Team

Our team is comprised of a diverse group of Madison-based partners with deep roots in and respect for our community. We live here, we work here, we've built our reputations here, and we are aligned in our dedication to our community. New Year Investments and Saiki Design are located less than a half mile from the Triangle. The rest of our team, including Potter Lawson, EQT by Design, and Baker Tilly, are all local-no more than ten miles from the site.

Experienced Partners

Our team brings together decades of relevant experience in transformative residential and urban infill development, meaningful community engagement, creative public and private financing, and exceptional design. Many of our team members have collaborated on multiphased residential developments, including the Findorff Yards District, and have a track record of working together. Baker Tilly has completed RAD applications for 28,000 units. Beyond our core team, we have built the relationships needed to bring in additional resources that we will tailor to project needs including engineers, contractors, and management partners. Our team has the experience and immediate capacity necessary to fulfill the scope of work.

Core values

Our team feels the best designed communities are places that people feel connected to. They are places that improve residents' health, happiness and wellbeing. We feel that an effective planning and development process is a collaborative process that capitalizes on a community's assets and potential. By paying attention and valuing the physical, cultural and social identities of the Triangle and its residents, we can support the ongoing evolution of the Triangle.

We hope our response to this RFQ not only answers your specific questions, but also illuminates our passion for this work. We look forward to learning more about your goals, and finding ways to meet them.

Kind regards, on behalf of our team,

Anne Neujahr Morrison & Sarah Neujahr



NEW YEAR INVESTMENTS
DEVELOPER AND TEAM
LEAD



Sarah Neujahr



Anne Neujahr Morrison

EQT BY DESIGN
COMMUNITY ENGAGEMENT
EXPERT AND
EQUITY CONSULTANT



Annette Miller



Mayra Medrano

BAKER TILLY
HUD AND LIHTC
CONSULTANT



Don Bernards



Jenn Kriehner

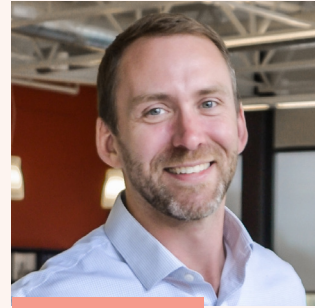


Katlin Konyn

POTTER LAWSON
ARCHITECTURE AND
PLANNING



Doug Hursh



Andy Laufenberg

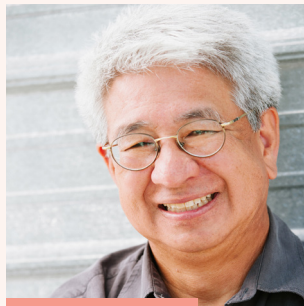


Rebecca Prochaska

SAIKI DESIGN
LANDSCAPE ARCHITECTURE



Abbie Mollien



Ken Saiki





1722 Monroe Street Apartments and Retail, 2019



Ella Apartments and Retail, 2021

	SEVEN27	NINE LINE & QUARTER ROW	1722 MONROE	ELLA APARTMENTS
NEW YEAR INVESTMENTS PRINCIPALS				
POTTER LAWSON				
SAIKI DESIGN				
BAKER TILLY				

Shared Team Experience 2012-Present

New Year Investments

New Year Investments is a woman-owned, real estate development and brokerage firm located in downtown and on the near south side of Madison. NYI draws on more than thirty years of combined experience shared between its two principals, Anne Neujahr Morrison and Sarah Neujahr.

At New Year Investments, we focus on the creation of thoughtfully designed, mixed-use urban-infill properties in Madison. With each project we grow our reputation as a developer who is committed to deeply understanding our surroundings, improving the built environment and strengthening our community. We choose our projects carefully. Both principals of NYI, are shareholders of Urban Land Interests, a family-owned asset management company founded in 1974.

New Year Investments is currently working on the redevelopment of the former Ella's Deli Restaurant Site. Located on the East Washington Corridor, Ella Apartments is a 100% affordable development, financed with a combination of Tax Exempt Bonds, Federal Low Income and State Low Income Housing Tax Credits. This project required navigating a complex financing structure, including a Fannie Mae Tax Exempt Collateral (MTEB) enhancement to bring 135 units of mixed income apartments to Eken Park.

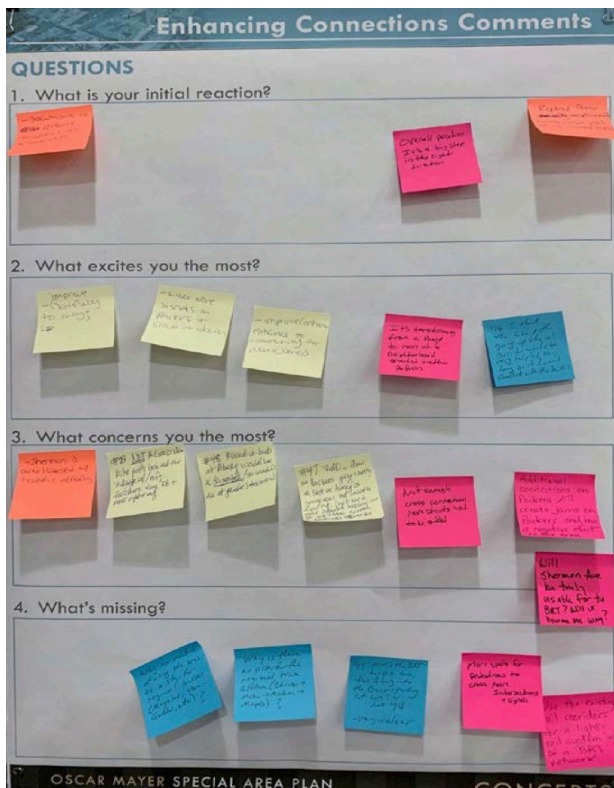
Ella Apartments will meet the goal of 25% Emerging Business Enterprise (EBE) participation and will be a Wisconsin Green Built project. With Ella Apartments NYI began its paid internship program which seeks to provide opportunities to underrepresented populations in the field of real estate. We strongly believe in workforce equity and diversity. As we grow our company and portfolio, this is a pillar that will be core to our workplace philosophy.

The principals of New Year Investments are tremendously proud of their work in the Findorff Yards District which is three blocks northeast of the Triangle. Over the course of 20 years the team was involved in working with property owners to masterplan the district and ultimately developed four housing projects with 350 new residences. The teams from New Year Investments, Potter Lawson, Saiki Design and Baker Tilly all played a role in this transformative redevelopment district.

In many of our projects, the New Year Investments has been recognized for engaging stakeholders early in the process and creating developments that are long lasting and enhance those they immediately serve. We hope to continue to grow our capacity and reputation for this work.

New Year Investments has strong relationships with the architecture, engineering and construction and financing community and works to engage the appropriate consultants for each project and phase.





Baker Tilly

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, the firm has worked with housing authorities in Milwaukee, Green Bay, Wausau, Wisconsin Rapids, Kaukauna, Oconto, Merrill and Antigo. They have worked on portfolio repositioning with housing authorities such as Flint, MI, LaGrange, GA and Anne Arundel, MD. Baker Tilly helps entities like the CDA convert housing units under HUD's repositioning tools, access other affordable housing financing options and navigate the development process successfully. Reviewing the details of each project, potential funding sources, and capital needs Baker Tilly confirms the best project structure.

The team leverages its experience with obtaining many layers of financing 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 embeds Diversity, Inclusion, and Belonging for Success (DIBS) into all aspects of our business – from strategy to operations. This is the framework for how the company recruits, develops, and promotes team members, it is the way they serve clients, manage projects and treat each other.

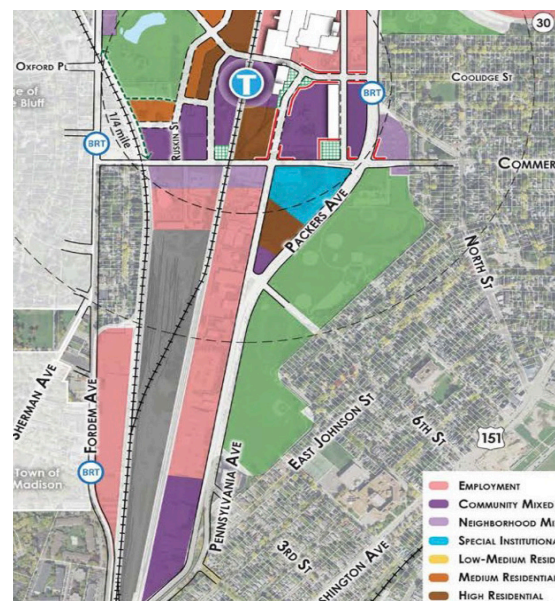
EQT by Design

EQT By Design, based in Madison, WI, is a woman- and BIPOC-owned business. EQT By Design brings 25+ years of experience in equity-centered strategic planning, change management, and organizational cultural design within government, community, and the corporate and nonprofit sectors.

Connecting and bridging perspectives made up of racially, ethnically, and linguistically diverse community members, as well as other intersectionalities, is at the heart of EQT's work. The team believes that success is achieved by building relationships and networks with connected, engaged, and diverse community members. EQT has supported communities and organizations from a variety of industries and sectors in developing engagement strategies centered around equity and inclusion. Their goals are to ensure that BIPOC, women and historically underserved and/or marginalized groups and people are able to build up their capacity and voice to ensure they are able to be economically successful while also whole-person healthy and able to thrive in the neighborhoods and communities they live, work and play.

EQT's methods of engagement are rooted in deep familiarity with the RESJI model and based on an equity lens strategy that seeks diverse perspectives from those who are difficult to engage, involve, or bring along, particularly within public policy and community and economic development initiatives. EQT's strategy focuses on slowing down the process to inform and engage, using grassroots networks and relationships to connect with diverse community members, and applying an inclusive and equitable policy analysis to our efforts.

EQT's recent work includes community engagement and EQT consulting on the Oscar Mayer Special Area Plan.



Images from Oscar Mayer Special Area Plan





Quarter Row at The Yards, 2017

Saiki Design

Saiki Design is an award winning, specialty landscape architecture firm based in Madison, Wisconsin with offices in Milwaukee, Wisconsin and Boulder, Colorado. Organized in 1989, the company provides services to both public and private clientele with project locations throughout the State of Wisconsin and the Upper Midwest. Saiki Design is a Certified Minority Business Enterprise (MBE), and is committed to equal employment opportunities for all individuals. Saiki Design is an office with over 100 years of combined staff experience; the team is comprised of licensed landscape architects, LEED accredited professionals, landscape designers with degrees in landscape architecture, master gardeners and student interns. Saiki Design has worked closely with public and private clients in Wisconsin and the Upper Midwest to create vibrant, successful urban infill developments.

Saiki Design understands the many intricacies of the urban infill project sector; the balances between durability, budget and aesthetic improvement and the challenges associated with existing urban infrastructure and systems. Saiki works closely with public and private clients to integrate their project into the urban fabric or neighborhood surrounding each site. Urban infill projects are particularly rewarding for many staff members who enjoy the challenge of working in the urban realm.

Potter Lawson

With a reputation for excellence dating back to 1913, Potter Lawson, Inc. is an architectural, planning, and interior design firm. Potter Lawson is focused on developing long-term relationships with clients – relationships based on the trust earned by providing quality design and exceptional service. Potter Lawson strives to add value through innovation and creativity, aligning with our clients' goals, delivering services that consistently meet or exceed expectations, schedule and cost objectives.

Master planning is one of Potter's core services. A well-conceived master plan is not a rigid formula for the future, but a flexible framework that can both inspire and guide development. From analysis of existing conditions to defining future goals, we thoughtfully develop plans that consider influential factors and provide a vision and road map for the future.

Potter Lawson recognizes the value of diversity at all levels, from our internal staff to our consultant partners. As a woman-led architecture firm, Potter Lawson has been dedicated to uplifting minority firms in the profession for decades. As a testament to this dedication, they were awarded The Accolade Award for Superior Minority Business Mentoring by the Wisconsin Department of Administration in 2003. Additionally, Potter Lawson is currently engaged in the BOSS program (Building Opportunities for Student Success) dedicated to outreach with minority K-12 students to help support the growth of equity and diversity in the profession of architecture.



Tobacco Lofts at The Yards, 2005





Project Understanding and Approach

As a team, we collectively understand the scope of the required services as outlined in the RFQ. There are no financial or legal issues that the team sees as impediments to launching the revitalization process. The scope includes Vision and Master Plan, Financial Plan, Implementation, and Funding. Our approach to the project will generally follow the outlined phases, but we envision there will be overlap of activities and that new partners including development and construction partners will be engaged as the project progresses. In our experience, we have found we need to engage team members and stakeholders from the start, but also consistently throughout the redevelopment process to ensure that resident and management needs are being met, lessons are being learned from design and construction and new financing tools and partnerships are being leveraged.

The CDA's goal is to have the units at the Triangle replaced or substantially upgraded within the next 5-10 years. This project will be completed in a phased approach beginning as soon as feasible with the engagement work. If awarded this opportunity and after some brief fact finding exercises, we would be able to produce a basic schedule. At this time producing a schedule is premature as the project unknowns are too great. We are confident that there are ways to meet the CDA's goal of completion within 10 years.

Advancing Racial Equity and Social Justice

A goal of any housing development should be to advance racial equity and social justice through the provision of high-quality housing and residents and community amenities, but this is not a goal that is usually at the forefront of a development process.

The development process has been dominated by too few voices and needs to change so that communities can ultimately feel a stronger sense of connection with their physical spaces. Our team has the composition needed to disrupt the traditional development process. An equitable process is one where the stakeholders and team members are not siloed and where diverse voices come together in a way that leaves those stakeholders satisfied with the process and the outcomes.

Sustainable Design

The CDA is looking to replace or renovate 55 year old structures. What comes next needs to be places and materials with a longer lifespan to ensure that not just the buildings are sustainable but that the community is sustainable. A smaller carbon footprint is critical, but just as valuable are spaces that the community can connect with that functionally and aesthetically stand the test of time. Our team includes three LEED Accredited Professionals as well as individuals versed in Wisconsin Green Built and other sustainability benchmarking tools. We are committed to working with stakeholders towards achieving the City's sustainability goals to achieve a 100% renewable energy and zero-net carbon emissions by 2030.

TEAM FIRSTS - POTTER LAWSON

1st LEED Platinum Certified Office Building in
Madison – 800 University Bay Drive

1st LEED Healthcare Certified Project in
Wisconsin – UW Health Digestive Health

1st LEED Certified Residence Hall in Wisconsin –
Edgewood College Dominican Hall

1st LEED Certified Residence Hall in the UW
System: UW Whitewater Starin Hall

1st LEED 4.1 Gold Certified Lab in Wisconsin: Exact
Sciences Clinical Processing Lab

1st LEED Certified Residence Hall in Utah: Donna
Garff Marriott Honors Residential Scholars
Community at University of Utah





Potter Lawson, in particular has been integrating sustainable design principles into the firm for over 30 years. Not only is it good for the environment, it provides clients with energy efficient buildings that can save money on operating costs, reduce maintenance and, in a project like this, become a showcase for thoughtful redevelopment and sustainable practices. The benefits of healthy interiors maximized by connections to nature and views to the outdoors, integration of extensive daylighting, and use of natural materials can enhance the quality of life for the residents and the community, elevate their quality of life, and lessen stress while being stewards of the environment.

Method for Soliciting Resident Engagement

This project will be designed to collect input from a cross-section of stakeholders representing varying diverse backgrounds connected to race, age, culture, ability and gender identity. The design of the outreach stages tapers from broad to specific, beginning with wide-reaching engagement on broad topics such as community values and ending with refining the details with individual resident centered interest. Our strategy focuses on slowing down the process to inform and engage, using grassroots networks and relationships to connect with diverse community members, and applying an inclusive and equitable policy analysis to our efforts.

EQT proposes the following strategies to engage, inform, and collaborate in a way that sustains the voices of the community. Due to COVID-19, the strategies for this project may shift to include using technology more frequently as a foundation for inclusive engagement, as well as implementing smaller focus groups.

Sample Engagement Tools + Strategies

- Survey (paper and online) - A survey to gather input from community constituencies to ensure general engagement insight and input for the process.
- Public Sessions - Where community members can share feedback on the Triangle project through a hands-on, interactive experience + online sessions for COVID-19 and accessibility and engagement design.
- Targeted focus groups - To ensure representation and inclusion on more specific areas of interest
- Community-wide information distribution - To inform, recruit, and generate participation
- Resident Lived Experience Council + Polling Affirmation - To gain and share community insight from the perspective of the resident demographic to ensure centering of their voice and views.

EQT will also be responsible for documenting and reporting findings from the engagement process. EQT will summarize and develop themes based on the information gathered to ensure the project team and CDA can deepen their understanding of how stakeholder input translates into a successful vision for the Triangle Redevelopment.



BAKER TILLY RAD EXPERIENCE

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. Accomplishments include:

- 28,000 Units for RAD Applications
- 2,807 Units Closed in RAD Transactions
- \$431M Development Costs

BAKER TILLY WISCONSIN PUBLIC HOUSING EXPERIENCE

Housing Authority of the City of Milwaukee

3 new construction and 1 rehab project utilizing 9% & 4% LIHTC with the 4% state credits

Wausau CDA

1 rehab project utilizing 9% LIHTC

Antigo

1 rehab project utilizing 9% LIHTC

Wisconsin Rapids

1 rehab project utilizing various sources

Green Bay

1 rehab project contemplating 4% LIHTC

Oconto

1 rehab project utilizing 4% LIHTC and 4% state credit

Merrill

1 rehab and new construction project utilizing 9% LIHTC

Kaukauna

1 rehab project utilizing 9% LIHTC

HUD Asset Repositioning

The Baker Tilly team has extensive experience with PHAs and the rules and regulations promulgated by HUD that govern their operations and finances. Baker Tilly has 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).

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.

New Year Investments principals have additional experience working on several HUD financed Asset Repositioning projects and programs. Anne Neujahr Morrison worked with the ownership groups on the ongoing management of LaFollette Park and Sturgeon Bluff apartments, each with a HAP Contract and LIHTC allocation. While at WHEDA and at NYCHDC she acted as underwriter and originator for the allocation of tax credits and loans for numerous HUD properties including the repositioning of Truax Park, and Sons of Italy, Churchill House, Linden Plaza, The Plaza/ Noble Drew, Ocean Gate, Fabria Houses, Seaview Towers and Magnolia Plaza. Additionally, Sarah Neujahr has worked for the General Services Administration who is responsible for acquiring, managing, and disposing of real property for most federal agencies. Sarah was key in the disposal of several underutilized assets and finding creative ways to maintain assets when the financial needs exceeded the available reinvestment funds.

Complying with HUD Section 3

HUD Section 3 is intended to ensure that employment and other economic opportunities generated by certain HUD Financial Assistance be directed to residents and businesses that provide economic opportunities to low and very low-income persons.

Through our resident engagement process and our broader relationships in the community we hope to identify opportunities available to tenants. EQT By Designs career history, experience, and business mission specifically in the Dane County area includes community and economic development efforts that build BIPOC, women, low-income directed employment and business generation opportunities.



Our team has experience complying with contracting and hiring goals that are similar to HUD Section 3. For example, the WHEDA LIHTC awards require compliance with the WHEDA Emerging Business and Workforce Development Program. In Dane County WHEDA requires efforts be made to award 25% of allowable construction costs to Emerging Businesses. Furthermore, WHEDA requires LIHTC recipients to employ unemployed and underemployed area residents in living wage construction jobs. With Ella Apartments, the newest LIHTC developed by New Year Investments, our team is on track to exceed the 25% emerging business participation goal.

Most Challenging Issues

As the HUD consultant with our team, Baker Tilly successfully navigated numerous challenges in repositioning public housing assets. Among the most challenging was at the asset level, as the RAD consultant for a 50-year-old property consisting of 200-units. In that case, the Public Housing Authority client 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. 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 significant for the deal structure was the high cost associated with the identified capital items including HVAC systems, electrical wiring, plumbing, and some roofs.

Due to capital needs being much higher than anticipated by The PHA, Baker Tilly had to go 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. The client and team determined the best option was a change in unit configuration. FHEO approved our request to re-configure units as needed for the market. Also approved was a reduction in 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.

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.

LIHTC Allocations in Wisconsin

Over the last 4 years, Baker Tilly has consulted on 43 projects awarded either 9% or 4% tax credits in 15 different communities in Wisconsin (including several in Madison), working in all of the set-asides (general, non-profit, supportive housing, rural and preservation), and working with the state of Wisconsin 4% tax credit as well. These developer clients have included housing authorities, non-profits and for profit developers.

In 2020 New Year Investments worked with Baker Tilly and successfully applied for and was awarded Federal and State LIHTC for the Ella Apartments project. Ella Apartments among the first projects in the 2020 round to begin construction and will be complete in 2022.



REFERENCE FOR A HUD-COMPLIANT REDEVELOPMENT/ REVITALIZATION

Fernando Aniban, CFO Housing Authority of the City of Milwaukee

809 N. Broadway Street
Milwaukee, WI 53202
T: (414) 286-5885
E: Fernando.Aniban@hacm.org

RFQ Respondent's Role: Baker Tilly, HUD and LIHTC Consultant

Baker Tilly worked with the Housing Authority of the City of Milwaukee on various projects included three new construction and one rehab project utilizing 9% LIHTC and 4% LIHTC with the 4% state credits.

REFERENCE FOR A PROJECT LOW INCOME HOUSING TAX CREDITS (LIHTC)

Eric Speichinger, Vice President Regions Bank

10 S Wacker, Suite 2575
Chicago, IL 60606
T: (312) 219-6572
E: eric.speichinger@regions.com

RFQ Respondent's Role: New Year Investments, Developer and Team Lead

Regions Bank provided 4% LIHTC and 4% State Housing Tax Credit equity to Ella Apartments, a 135 unit property under development by New Year Investments. Additionally, Regions Bank provided construction financing, bridge financing and facilitated the Fannie Mae enhancement on the tax exempt bond issuance.

OTHER REFERENCE

Jeff Tubbs, Executive Vice President J.H. Findorff & Son

300 South Bedford Street
Madison, WI 53703
T: (608) 442-7347
E: jtubbs@findorff.com

RFQ Respondent's Role: New Year Investments/ Developer and Team Lead, Potter Lawson/ Architecture and Planning, Saiki Design/ Landscape Architecture

J.H. Findorff and Son shares a long and successful history with several of our teammates. Findorff worked with Anne Neujahr Morrison (NYI) on the development of SEVEN27, Nine Line and Quarter Row in the nearby Yards District which also included work by Potter Lawson and Saiki Design. Additionally, Potter Lawson and Findorff have collaborated on the JH Findorff Headquarters and the Association of Bar Examiners in the Yards and the Exact Science campus.



Disclosures

The RFQ requires disclosure if any team member has acted as a development partner or has any ownership interest in any project currently underway or completed within the last five years, please provide the following information for the team member or any related entity, as applicable

Financial Standing: There are no known foreclosure, default, or bankruptcy cases within the past ten years

Legal Standing: There are no known litigation completed, pending, or underway in relationship to any financing or construction project within the past five year

Compliance

Affirmative Action Ordinance: We will comply with the Affirmative Action Ordinance of the City of Madison (MGO 39.02)

Licensing: Several members are licensed by the State of Wisconsin. These include New Year Investments (licensed broker), Potter Lawson (licensed architects), Baker Tilly (CPA). These members will be licensed within the State of Wisconsin for the duration of the project and will carry sufficient Errors and Omissions Insurance.





Anne Neujahr Morrison

New Year Investments | Principal

For over two decades Anne has focused her career on the creation of successful urban infill communities with a focus on multifamily housing and mixed use developments. She serves on the Board of Directors and is a shareholder at the asset management company, Urban Land Interests. Anne coordinated the financing and led the development on behalf of ULI for a number of housing projects, including: the award-winning Quarter Row at The Yards (88 units, 2017) and Nine Line at The Yards (80 units, 2015). She managed the completion of SEVEN27 at The Yards (117 units, 2013) and led the tenant-in-place rehabilitation of Lincoln School Apartments (28 units, 2014). Since creating New Year Investments, a ULI affiliated development firm, in 2019, Anne has managed the development of 1722 Monroe (63 units, 2019) and Ella Apartments (135 units, under construction).

Anne previously worked as a Senior Underwriter for WHEDA from 2009-2012, and as an Assistant Vice President at New York City Housing Development Corporation from 2006-2009, where she sharpened her financing skills with a focus on Low Income Housing Tax Credits (LIHTC) and tax exempt bond financing. Many of her projects benefited from HUD contracts and additional soft financing sources ranging from HOME, FHLB and local resources. Her background also includes work for EYP Architects and Engineers, Gruzen Samton Architects, Jonathan Rose Companies, the City of New York Community Board 8, and the Illinois Legislature.

EDUCATION

M.S. Real Estate Development
Columbia University, Graduate School
of Architecture Planning and
Preservation.

B.A. Political Science
Carleton College

KEY EXPERIENCE

Visioning, entitlements, financing
and construction administration for
8 Madison developments comprising
500 residential units.

Underwriting and origination of
\$800M in tax exempt bond loans and
7,500 units of LIHTC housing for New
York City Housing Development Cor-
poration and Wisconsin Housing and
Economic Development Authority.

COMMUNITY INVOLVEMENT

Downtown Madison, Inc, Board of
Directors

Madison Development Corporation,
Board of Directors and Housing Com-
mittee Chair

City of Madison,
Housing Strategy Committee, Chair





Sarah Neujahr

New Year Investments | Principal

As a Principal in New Year Investments, Sarah brings a depth of expertise in asset management, property management, public sector real estate, change management, and financial analysis. She has worked in the real estate industry in both the public and private sectors, for the last 18 years. Her work is informed by her broad experience working in large and small communities across nine states: CO, IL, MT, ND, SD, ND, UT, WI and WY.

In her public sector work Sarah was integral in securing funding for new and repositioned federal real estate projects and rightsizing the federal real estate portfolio. In each project she led teams to determine the best course of action whether it be maintaining real estate assets as-is, repositioning or disposition. Her work involved properties on both the owned and leased side for agencies ranging from FEMA to HUD. She is skilled in conducting workplace engagements allowing diverse stakeholders to play a major role in giving input and helping design their future workspaces.

Sarah served as a contracting officer for the General Services Administration (GSA) awarding contracts and obligating funds on behalf of the federal government. Prior to joining the GSA, Sarah's real estate management experience included management of apartments, a condominium complex and industrial facilities.

In addition to her extensive real estate project management skills, Sarah brings her experience in LEED Design and a focus on change management.

EDUCATION

M.S. - Real Estate and Construction Management, University of Denver

B.A. - Political Science, Denison University

RELEVANT CERTIFICATIONS

LEED AP

Prosci Certified Change Practitioner

KEY EXPERIENCE

Workplace engagements with federal partners to meet federal real estate goals including HUD, USGS, EPA, BLM

Asset strategy for all federal-owned assets in Montana and Colorado including Courthouses and Land Ports of Entry

Repositioning of federally owned assets

Disposal of the Missoula Federal Building





Annette Miller

Founder & CEO | EQT by Design

Annette Miller has lived in Madison since 1989 with her life partner, Mike, and three children they have raised together. She brings 25 years of strong professional policy, racial equity, and analytic skills, and a wide network of community, government, and business relationships, especially with Dane County's diverse populations. Her experience includes decision-making roles across state government, as a Mayoral Aide for the City of Madison, and as Emerging Markets Development Director for Madison Gas and Electric. Annette is widely-recognized for her commitment to meaningful change, with an emphasis on inclusivity, listening, engendering trust, and capacity and wealth building for broad-based community and economic impact and inclusion by Black, Indigenous and People of Color. In 2017, she launched EQT By Design (EQT) to focus on developing diverse, inclusive, sustainable strategies in public engagement, equitable community development projects, and organizational cultural change management.

As CEO and founder of EQT, Miller's passion is ensuring that inclusion and engagement are front and center in her work. EQT does this work by engaging the community in equity centered efforts, disrupting and changing inequitable policies, systems, and structures, while consulting and modeling to provide concrete action steps to increase economic and community impact and decision making for Black, Indigenous and People of Color.

In the last three years, health equity has been a particular focus for Annette and EQT. Specifically, EQT - in partnership with the Foundation for Black Women's Wellness - underwent an extensive engagement process on behalf of the Dane County Health Council with 350 community members across Dane County.

EDUCATION

Master of Science, Social Innovation & Sustainability Leadership | Edgewood College

Bachelor of Arts, English | University of Wisconsin-Madison

Anima Deep Diversity certification

International Association of Public Participation (IAP2) certification

RECENT WORK

Oscar Mayer Special Area Plan

University Library Mall

Law Park/John Nolen Waterfront Project

Allied Drive Visioning

Urban League Greater Madison Planning

AWARDS

2016 - James C. Wright Human Rights Award

2014 - Badger Bioneer Award, Centro Hispano Roberto G. Sanchez Award, Mentoring Positives Muriel Pipkins Award

2012 - United Way Mike McKinney Volunteer Award

2011 - WI Women of Color Network, Woman of Achievement Award

2010 - YWCA Women of Distinction Award





Mayra Medrano | EQT by Design Community Engagement & EQT Consultant

Mayra Medrano joined the EQT By Design team in January of 2021 after completing the MBA program at American University in Washington DC. Mayra has over 15 years of work experience in the private and non-profit sectors. In addition, Mayra has been a community advocate fostering and nurturing relationships that significantly improve organizational public awareness. She has volunteered her time with several community organizations. Former President of the Board of Directors for the Latino Chamber of Commerce of Dane County (Wisconsin). As well as, Co-founder and former President of Madison Public Market Foundation. Mayra is passionate about economic development initiatives that create positive systematic changes to communities and regions.

At EQT by Design, Mayra utilizes methods of engagement that are based on an equity lens strategy that seeks diverse perspectives from those who are difficult to engage, involve, or bring along, particularly within public policy and community and economic development initiatives.

At MPowered Strategies Consulting Mayra documented and packaged MPS' Office 365 Change Management & Training Capability process and developed phased approaches that included objectives, activities, and deliverables to facilitate an optimal deployment of Microsoft Office 365 in a Federal Organization or a Small Business.

For fifteen years, Mayra worked at Madison Gas and Electric Company where she managed Commercial, Industrial, and Small Business Accounts advising on strategy for optimizing energy efficiencies by identifying changes to client operations resulting in collaborations that allow positive impact on clients' operating budgets. In her tenure she represented MGE on various community boards, civic engagements and focused on

EDUCATION

Master's Degree in Business Administration (MBA), Data Analytics Certification | American University, Washington D.C.

Bachelor of Science, Business Administration, Minor in Business Management | Herzing College, Madison WI

KEY EXPERIENCE

Library Mall , University of Wisconsin

This project seeks to provide a feasibility plan for the redevelopment of Library Mall, the public open space between Memorial Library and the Wisconsin Historical Society, on the UW-Madison campus. EQT engagement strategies and design, based on stakeholder input, provide conceptual alternatives to help prepare cost estimates, anticipate schedule for completion while providing an illustrative vision of the preferred alternative for fundraising purposes.





Doug Hursh

Potter Lawson | Principal

Doug is a Principal and the Director of Design at Potter Lawson with a passion for master planning and urban redevelopment. Doug works with talented design staff to create designs that embody the visions of our clients while elevating the quality of life for the community in which our projects touch. He has more than 30 years of design experience and has won numerous design awards for his thoughtful timeless designs. Doug's emphasis on establishing a close working relationship with his clients has resulted in projects that incorporate innovative design and planning solutions. He strives to develop projects that represent enduring design that are not dated, but rather is admired over time.

Doug is also part of the sustainable design team at Potter Lawson. He has led and leads our design teams through the green design process to create energy efficient and environmentally friendly projects, sustainable design is ingrained in every project at Potter Lawson. Doug's passion for green design began in the 1980's before the sustainable trend as he recognized the critical role that architecture plays on the daily lives of all.

Relevant experience includes: Archipelago Village Master Plan – 900 E. Washington Avenue, American Family American Center Comprehensive Master Plan Update (2019), Judge Doyle Square Master Plan, Edgewood Campus Master Plan, Regent Street Neighborhood Master Plan, Meriter Campus Master Plan, University Crossing Redevelopment Master Plan, University Square Development, Ella's Apartments, 1722 Monroe Apartments, Quarter Row Apartments, Novo Apartments (f.k.a Judge Doyle Square), The Avenir Mixed Use Redevelopment, Domain Apartments

EDUCATION

AA – University of Florida

B.Arch. – University of Florida

REGISTRATION

Wisconsin Architectural Registration

LEED Accredited Professional

RELEVANT EXPERIENCE

Quarter Row Apartments at the Yards
*

Nine Line Apartments at the Yards*

Ella Apartments *

1722 Monroe*

Archipelago Village Master Plan

Meriter Campus Master Plan

Regent Street Neighborhood Master Plan

University Square and East Campus Mall Corridor Master Plan

** Indicates project with New Year*





Andrew Laufenberg, RA Potter Lawson | Designer

As a designer with Potter Lawson, Andy believes that working with our clients is as important as the final product. Focusing on intricate details and the impact architecture has on the surrounding community lie central to Andy's planning and design approach. He believes that the clarity and quality of the process ultimately determines the level of design and value that we as a team can achieve, which includes engaging a thoughtful range of stakeholders. Andy works to develop comprehensive solutions that are sensitive to each project's unique needs, yet responsible to both the budget and schedule while delivering elevated design to the communities in which we work and live. Andy thrives at developing design language that is reflective of its place while achieving each project's unique goals which will be a direct benefit to this project as we work to develop solutions that are welcoming to the community while creating a safe environment for residents. Andy's appreciation for each team member's expertise result in cohesive thoughtful planning solutions that excel at building consensus and community support.

Relevant experience includes: Novo Apartments (f.k.a Judge Doyle Square), 920 E. Main Apartments, Quarter Row Apartments*, 929 East Washington Mixed Use Development, West Place Mixed Use Development, Austin Place (Block 100) Redevelopment.

** Indicates project with New Year Investments*

EDUCATION

M.Arch. – UW-Milwaukee

B.Arch. – UW-Milwaukee

REGISTRATION

Wisconsin Architectural Registration





Abbie Mollien, PLA, ASLA

Landscape Architect, Principal | Saiki Design

Abbie Mollien is a principal and vice president of Saiki Design. She is a licensed landscape architect and certified master gardener with experience in master planning, site-scale planning and design, green roof design, detailed design, and construction administration. Abbie has designed and managed several significant public and private projects, most notably the Bee Branch Creek Restoration, UW Health at the American Center site and green roof, and the Gardens of St. Mary's Hospital. Abbie is skilled at listening closely to clients and stakeholders and translates her understanding of design and material selection into elegant and award-winning projects. She is especially enthusiastic about therapeutic landscapes and nature-based play spaces for all ages

Recent Work:

- Seven27 Apartments at the Yards Site and Roof Terrace Design, Madison, WI
- Nine Line Apartments at the Yards Planting Design, Madison, WI
- Quarter Row at the Yards Planting Design, Madison, WI
- J.H. Findorff & Son at the Yards Expansion and Planting Renovation, Madison, WI
- 1722 Monroe Apartments, Madison, WI
- Madison Youth Arts Center Roof Terrace Design, Madison, WI
- The Arden Apartments Site and Roof Terrace Design, Madison, WI
- Olin Park Building Expansion and Renovation, Madison, WI
- Madison Children's Museum "Wonderground", Madison, WI
- Truman-Olson Development, Madison, WI
- SSM Health South Madison Campus, Madison, WI
- Comiskey Park Master Planning and Design, Dubuque, IA
- 8Twenty Park Apartments Green Roof and Planting Design, Madison, WI
- UW Health at The American Center Site and Green Roof Design, Madison, WI
- The Gardens at St. Mary's Hospital Landscape Master Plan and Planting Design
- UW-Madison School of Human Ecology Planting Design, Madison WI

EDUCATION

Bachelor of Science, Landscape Architecture

Certificate in Environmental Studies

University of Wisconsin, 2007

REGISTRATION

Wisconsin, Landscape Architect: 673-14

Master Gardener Certification

MEMBERSHIP

American Society of Landscape Architects

Olbrich Botanical Society

Friends of Allen Centennial Gardens

Clean Lakes Alliance Member





Ken Saiki, PLA, Landscape Architect, Principal | Saiki Design

Ken Saiki is a principal and founder of Saiki Design, Landscape Architects, of Madison, Wisconsin. The firm, established in 1989, is the recipient of numerous design awards, both nationally and on a state-wide basis. In addition to his work at his firm, Ken has lectured at the University of Wisconsin-Madison for the Departments of Landscape Architecture and Urban and Regional Planning. He has served on the City of Madison's Zoning Ordinance Re-write Advisory Committee, the Lisa Link Park Advisory Committee and the Urban Design Commission. He is a Past President of the Wisconsin Chapter of the American Society of Landscape Architects. Ken excels at place-based design solutions grounded in extensive stakeholder and community engagement.

Recent Work

- Judge Doyle Square Redevelopment, Madison, WI
- James Madison Park Master Plan, Madison, WI
- Olin Building Renovation, Madison, WI
- The Edgewater Hotel Rooftop Plaza and Site Design, Madison, WI
- Madison Public Market Site and Landscape Design, Madison, WI
- Ho Chunk Gaming, Madison Campus Redevelopment and Expansion, Madison, WI
- Vel R. Phillips Streetcar Plaza Site Design, Milwaukee, WI
- Community Space Concept Design, Brown Deer, WI
- Allen Centennial Gardens Master Plan, University of Wisconsin-Madison
- Olbrich Gardens Education Center and Greenhouse Additions, Madison, WI
- American Players Theatre, "Up the Hill" Site Renovation, Spring Green, WI
- Stone Horse Green Downtown Public Plaza Site Design, Middleton, WI
- Bee Branch Creek Restoration Master Plan and Open Space Development, Dubuque, IA
- Central Park Master Plan and Phase I Implementation, Madison, WI
- Elizabeth Link Peace Park Renovation, Madison, WI
- Monroe Street Plaza Site Design, Madison, WI

EDUCATION

Bachelor of Science, Landscape Architecture, University of Wisconsin, 1979

MEMBERSHIP

Project Review Committee, The American Center, Madison, WI // 1999-Present

RESIDENTIAL PROJECTS

The Breese Apartments Site and Rooftop Gardens, Madison, WI
The Lyric Apartments Site and Rooftop Terraces, Madison, WI
Fair Oaks Apartments, Madison, WI





Don N. Bernards

Partner | Baker Tilly

Don is well versed in structuring affordable housing transactions. 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.

- 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
- 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)
- Assists with obtaining debt for various types of affordable housing, including taxable and various tax-exempt debt
- In the past five years, assisted in raising and closing more than \$500 million in equity for LIHTC and Historic Tax Credit projects
- Clients include developers that are not-for-profit, Public Housing Agencies, Tribal Housing Entities and for-profits, as well as tax credit investors

EDUCATION

Bachelor of Business Administration
in Accounting, University of
Wisconsin-Madison

INDUSTRY INVOLVEMENT

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

COMMUNITY INVOLVEMENT

United Way of Dane County
Foundation Board Member

United Way Affordable Housing Fund
Committee Chair

Luke House community meal
program lead and Board Member





Kaitlin Konyn

Senior Manager | Baker Tilly

Kaitlin specializes in consulting with, and assisting developers to 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).

- 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
- 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 securing equity for LIHTC projects through networking with investors and reviewing letters of intent

EDUCATION

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

COMMUNITY INVOLVEMENT

Rodney Scheel House Foundation
Board Member





Jenn Kriehner, MPA, LEED AP Manager | Baker Tilly

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 Recaptalization 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.

EDUCATION

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

Bachelor of Arts in Political Science
Marquette University

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 confer-
ences, including the National Associ-
ation of Housing and Redevelopment
Officials, National Leased Housing
Association, and National Housing &
Rehabilitation Association

