

To: Dane County Purchasing Division
Room 425 City-County Building
Attn: Carolyn A. Clow
210 Martin Luther King Jr. Drive
Madison, WI 53703-3345

From: Mirus Partners, Inc.
7447 University Avenue, Suite 210
Middleton, WI 53562

Affordable Rental Housing
Affordable Housing Development Fund
RFP #118054

Due 2:00PM June 6, 2018

**Dane County
Affordable Rental Housing
Affordable Housing Development Fund
#118054**

REQUEST FOR PROPOSALS (RFP)

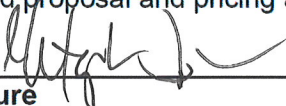
**The Ace
Apartments
MADISON, WI**



RFP COVER PAGE SIGNATURE AFFIDAVIT	
NAME OF FIRM:	Mirus Partners, Inc.
STREET ADDRESS:	7447 University Avenue, Suite 210
CITY, STATE, ZIP	Middleton, WI 53562
CONTACT PERSON:	Christopher Jaye
PHONE #:	(608) 824-2294
FAX #:	(608) 260-7832
EMAIL:	jaye@miruspartners.com

In signing this proposal, we also certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer, competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening of proposals to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned, submitting this proposal hereby agrees with all the terms, conditions, and specifications required by the County in this Request for Proposal, and declares that the attached proposal and pricing are in conformity therewith.

 <hr style="border: 0; border-top: 1px solid black;"/> Signature	<hr style="border: 0; border-top: 1px solid black;"/> President Title
<hr style="border: 0; border-top: 1px solid black;"/> Christopher Jaye Name (type or print)	<hr style="border: 0; border-top: 1px solid black;"/> 6/5/18 Date

Addendums -This firm hereby acknowledges receipt / review of the following addendum(s) (If any)

Addendum # _____ Addendum # _____ Addendum # _____ Addendum # _____

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TAB 1

Introduction

Introduction

THE ACE APARTMENTS

The Ace Apartments will be a newly constructed a 70-unit affordable multifamily housing community developed in the City of Madison on a site is located on the East side at the corner of Cottage Grove Road and Acewood Blvd. It is located within the City of Madison's Cottage Grove Road Activity Centers Planning District. As such the Ace Apartments site is part of a larger redevelopment district created by the City of Madison called the Cottage Grove Road Activity Center. This area has been identified by the city for a targeted planning effort to analyze opportunities for creating exciting and viable neighborhood activity centers along Cottage Grove Road. The Ace Apartments will include a total of 70 units consisting of 14 one-bedroom, 34 two-bedroom and 14 three-bedroom units (20% of total unit).

Twenty-two percent of the units (16 units) will have rents affordable to households earning below 30% of county median income and will be marketed to low income tenants who either have a permanent disability or are military veterans. Those tenants will be provided with access to supportive services provided either by various services providers including those funded by Wisconsin Family Care Agencies and their contracted services providers or Veterans Services providing agencies as appropriate. All services provided will be voluntary on the part of the tenant and will be paid by third parties, therefore the project operating budget does not include any supportive services costs.

The Ace Apartments is a joint venture between Movin' Out, Inc. a statewide nonprofit housing agency and Mirus Partners, Inc. a for profit multifamily developer who focuses on affordable housing development projects. This project represents the fifth joint venture as partners. The project will be owned by a yet to be formed LLC that will have at a minimum two members, an investor member and a managing member. The managing member will be a second LLC with Movin' Out, Mirus Partners and Dane County Housing Authority as its members. This is a typical tax credit ownership structure.

TAB 2

Development and Service Team
Background

Development and Service Team Background

Mirus Partners, Inc. and Movin' Out, Inc.'s experience in obtaining Section 42 Tax Credits; participating in public/private joint ventures; developing multi-family housing for low-income households and developing permanent supportive housing.

Mirus Partners, Inc. and its co-development partner Movin' Out, Inc., together with the additional team members described in this section, have extensive experience in securing and utilizing Section 42 Tax Credits and financially structuring this type of project successfully. Our team has the full skill set required to plan, close, construct and then own and operate affordable multi-family housing of this type as evidenced by the list of successful projects listed below. All multi-family projects Movin' Out is involved with include integrated supported housing units of which we have extensive experience. This project represents the fifth joint venture of Mirus Partners, Inc. and Movin' Out, Inc.

Together Mirus Partners and Movin' Out have assembled a highly qualified development team to plan, develop, construct and manage The Ace Apartments. Mirus Partners, Inc. will be the Lead Developer while Movin' Out, Inc. will partner as the Co-Developer. Mirus Partners, Inc. and their subsidiary Syncromatic Construction, LLC will act as the General Contractor. This same partnership platform was used for our recently closed project called The Royal located on West Broadway in Madison. The Ace Apartments will reflect the same high-quality development.

The following listed development team will be responsible for The Ace Apartments project from start to finish. Corporate overviews and resumes of key team members are included at the end of this section.

Mirus Partners, Inc.

Mirus Partners, Inc. – *Lead Developer and Co-Owner*

Mirus Partners, Inc.'s responsibilities include overall project coordination and implementation, providing long-term financial guarantees, assembling required financing, obtaining all required zoning and building approvals in addition to overseeing the ongoing property management of the completed project.

Mirus Partners, Inc. ("Mirus") is a real estate development company based in Middleton, Wisconsin, focused on creating high-quality housing opportunities for a variety of income levels through unique public/private partnerships. Mirus is intently focused on the diligent and responsible development, acquisition and asset management of high-quality apartment projects in strong markets, with an emphasis on the creation and preservation of long-term value. The Principals of Mirus collectively have over 40 years of extensive experience in the development of multifamily housing financed with federal low-income housing tax credits and have developed over 3,000 units of high-quality apartment projects. Since 1997 the Mirus principles have been involved in the development of 38 affordable housing projects. Our experience gives us the ability to identify and maximize opportunities in development, acquisition, redevelopment and rehabilitation.

Mirus believes the most successful endeavors involve working with communities, elected officials and neighborhoods to ensure the development of a community that exceeds community expectations and acts as a catalytic spark for other development and redevelopment in the communities we serve. Our development process involves extensive market research and site analysis, which allows us to incorporate architectural and functional design elements that are most appropriate to the neighborhoods and communities we serve.

The Mirus team has extensive experience with new construction, historic rehabilitation, and acquisition and redevelopment projects, and the skills and experience to obtain governmental approvals and to consistently manage our projects to successful on-time, on-budget completion. The principles of Mirus Partners have experience with a wide variety of financing sources such as: Section 42, Section 47, Section 236, USDA 515 and 538, and HUD Section 8, bond financing, HOME funds, grants and tax incremental financing.

Mirus Partners, Inc. focuses on developing and managing sound real estate investments that bring added value to their neighborhood and represent a solid asset to the life of the community.

Christopher Jaye, the President of Mirus Partners, Inc. provides oversight for all Mirus projects. Mr. Jaye most recently served, and will continue to serve, as President of Antach Management Corporation ("Antach"). In addition to Antach, and prior to forming Mirus Partners, Inc., Mr. Jaye was involved with Silverstone Partners, Inc. in affordable housing investments, including acquisition, debt and equity financing, interactions with local, state and federal governmental agencies, construction and asset management.

Mr. Jaye has 20 years of experience in multifamily housing finance and has participated in over \$350 million in debt and equity investments. Mr. Jaye has served as Vice President of the Commonwealth Companies – a Wisconsin-based developer of affordable housing. Prior to

focusing on development, Mr. Jaye spent twelve years involved in the acquisition and syndication of affordable housing investments, most recently as Vice President of Acquisition for PNC Multifamily Capital, a national provider of debt and equity financing.

Mr. Jaye received his Bachelor's Degree in Political Science from the University of Wisconsin-Madison.

Kristi Morgan, the Vice President and Chief Operating Officer of Mirus Partners, Inc. is involved in all aspects of Mirus's projects. She is involved in both asset management and the evaluation of new development opportunities, including the financing and budgeting aspects of the developments. Prior to forming Mirus Partners, Inc., Ms. Morgan most recently served, and will continue to serve, as Chief Operating officer for Silverstone Partners, Inc. ("Silverstone") as well as continue to asset manage the existing Silverstone portfolio. Ms. Morgan was the Director of Housing and Commercial Development with The Great Lakes Companies, Inc., a diversified real estate company and the largest owner, operator and developer in North America of drive-to family resorts featuring indoor water parks and other family-orientated activities.

Ms. Morgan has 22 years of extensive experience in real estate management, development, real estate feasibility analysis, IRS Section 42 Tax Credit Program, HUD Section 8 housing, Tax Exempt Bond Financing Programs on local, state, and federal levels, capital and operational budgeting, property inspection and evaluation.

Ms. Morgan received her Bachelor's degree in Business from the University of Wisconsin-Madison.

Mirus Partners LIHTC Properties:

- **2 Oaks - New Orleans, LA**
 - *400-unit family affordable rental housing*
- **Algonquin Manor – Brown Deer, WI**
 - *80-unit affordable rental housing for seniors*
- **Auxiliary Court – West Bend, WI**
 - *59-unit affordable rental housing for seniors*
- **Bradley Manor – Beaver Dam, WI**
 - *51-unit affordable rental housing for seniors*
- **Brookstone Commons – Neenah, WI**
 - *52-unit affordable rental housing for seniors*
- **Columbia Square – Milwaukee, WI**
 - *23-unit family affordable rental housing*
- **Cornerstone Commons – Johnston, IA**
 - *62-unit family affordable rental housing*
- **Eastland Apartments – Evansville, IN**
 - *161-unit family affordable rental housing*
- **The Element – Sun Prairie, WI**
 - *240-unit family affordable rental housing*
- **Fairview Crossing – Lake Charles, LA**
 - *275-unit family affordable rental housing*
- **Fond du Lac Townhomes – Fond du Lac, WI**
 - *48-unit family affordable rental housing*
- **Globe Apartments – Watertown, WI**
 - *48-unit unit family affordable rental housing*

- **Harborside Commons – Kenosha, WI**
 - 98-unit affordable rental housing for seniors
- **Lakefront Manor & Villas – Oshkosh, WI**
 - 66-unit affordable rental housing for seniors
- **The Landings – Mitchell, SD**
 - 31-unit family affordable rental housing
- **Lynndale Village – Grand Chute, WI**
 - 60-unit affordable rental housing for seniors
- **Madison Place – Beaver Dam, WI**
 - 62-unit affordable rental housing for seniors
- **Marquette Manor – South Milwaukee, WI**
 - 74-unit affordable rental housing for seniors
- **Meadowlawn Plaza – Mitchell, SD**
 - 105-unit family affordable rental housing
- **Mission Village of Menasha – Menasha, WI**
 - 66-unit affordable rental housing for seniors
- **Mission Village of Sheboygan – Sheboygan, WI**
 - 105-unit family affordable rental housing
- **Monroe Street Apartments – Waterloo, WI**
 - 24-unit family affordable rental housing
- **Park Place – Reedsburg, WI**
 - 48-unit affordable rental housing for seniors
- **Parkcrest Apartments – Madison, WI**
 - 128-unit family affordable rental housing
- **Parkside Senior Housing – Hartford, WI**
 - 50-unit affordable rental housing for seniors
- **Pioneer Ridge Apartments – Wisconsin Dells, WI**
 - 72-unit family affordable rental housing
- **Ridgecrest Apartments – Madison, WI**
 - 127-unit family affordable rental housing
- **River Bend Senior Apartments – West Bend, WI**
 - 52-unit affordable rental housing for seniors
- **The Royal – Madison, WI**
 - 48-unit family affordable rental housing
- **Sedgemoor Apartments – Elkhorn, WI**
 - 48-unit affordable rental housing for seniors
- **Sherman Glen Apartments – Madison, WI**
 - 98-unit affordable rental housing for seniors
- **Springbrook Village – Burlington, WI**
 - 48-unit affordable rental housing for seniors
- **St. Peter's Place – Fond du Lac, WI**
 - 46-unit affordable assisted living
- **Sunrise Village – South Milwaukee, WI**
 - 48-unit affordable rental housing for seniors
- **Waterview Apartments – Lawrenceburg, IN**
 - 64-unit family affordable rental housing
- **William A. Passavant – Milwaukee, WI**
 - 51-unit affordable rental housing for seniors
- **Woodside Terrace – Beloit, WI**
 - 120-unit family affordable rental housing
- **Woodview Apartments – Muskego, WI**
 - 24-unit affordable rental housing for seniors

Movin' Out, Inc.

Movin' Out, Inc. – *Co-Developer and Co-Owner*

Movin' Out, Inc. will coordinate its efforts with Mirus Partners, Inc. to provide long-term financial guarantees, assist in assembling required financing, obtaining all required zoning and building approvals, and assist in overseeing the ongoing property management of the completed project.

Movin' Out, Inc. has 20 years of experience in the area helping low income families with the purchase of a home or attaining permanent affordable rental housing solutions. Movin' Out works in close partnership with human service systems to ensure that households who need supportive services to be successful in their homes have a commitment for those services, as part of their housing plan. Movin' Out is using this approach in the planning for The Ace Apartments.

During the past 20 years Movin' Out, Inc. has assisted over 1,500 low-income households to purchase homes statewide in Wisconsin. Additionally, during the past ten years Movin' Out, Inc. has developed and now owns and operates or has under development over 1,000 units of affordable rental units in five Wisconsin counties. Movin' Out participated in the planning of these projects, secured capital subsidies for the development of the units; provided housing counseling to prospective tenants and home owners. Movin' Out has also provided down payment assistance to many of the home owners in those projects.

Movin' Out, Inc.'s key development staff Dave Porterfield has over 25 years of affordable housing development experience and has been involved with Movin' Out through the provision of consulting services throughout the history of the organization. He joined the staff eleven years ago. During his career Dave has been the key development staff in the majority of the development projects Movin' Out has carried out or been associated with. Dave has extensive experience with a wide range of financing programs including HUD 811 and Section 42 Tax Credits.

Kathryne Auerback, executive director of Movin' Out, Inc. brings over 20 years of experience leading the change for healthier and more equitable organizations and communities. She has managed numerous green building and other environmental and health-related enterprises. Auerback earned her MA and MBA degrees from UW-Madison.

Movin' Out has developed or participated in the following projects:

- **Berkshire Greendale - Greendale, WI**
 - *11 units of affordable rental housing for seniors with permanent disabilities as part of a 90 unit independent senior housing project which Movin' Out is doing in partnership with General Capital Group. The project is financed with a combination of section 42 tax credits and federal HOME funding*
- **Bradley Crossing - Brown Deer, WI**
 - *11- unit affordable rental housing project targeted for families who have family members with permanent disabilities which is part of a 60 unit section 42 financed supportive housing project that Movin' out is doing in partnership with Jewish Family Services and General Capital Group.*

- **Elven Sted- Stoughton, WI**
 - *33-unit affordable rental housing projects financed with Section 42 tax credits*
- **Globe Apartments - Watertown, WI**
 - *11 units of supported housing integrated into a 48-unit section 42 tax credit project located in downtown Watertown, WI. Movin' Out carried out this project in partnership with Mirus Partners and Horizon Development and Construction.*
- **Harbor House - Madison, WI**
 - *11-unit affordable rental project integrated within a 240- unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding*
- **Madison and Main - Waunakee, WI**
 - *10 units of supported housing integrated into a newly constructed 78- unit market rate mixed use project in downtown Waunakee, WI. Movin' Out partnered with CBH, LLC a partnership of local business people from Waunakee to plan and develop this innovative project.*
- **Maple Grove Commons - Madison, WI**
 - *20 units of supported housing integrated into a 78 unit mixed income section 42 financed projects located on McKee Road in Southwest Madison as a joint venture with Oakbrook Corporation.*
- **Middleton Senior Apartments- Middleton, WI**
 - *8 units of affordable rental housing project for seniors with permanent disabilities as part of a 56-unit independent senior housing project which Movin' Out is doing in partnership with MSP Inc. The project is financed with a combination of section 42 tax credits and federal HOME funding.*
- **Monroe Street Apartments - Waterloo, WI**
 - *8 units of supported housing integrated into a 24 unit mixed income section 42 project carried out as a joint venture with Mirus Partners located in the downtown of Waterloo, WI in Jefferson County.*
- **New Berlin City Center- New Berlin, WI**
 - *102-unit affordable rental housing project for families with eleven units reserved for tenants who have family members with permanent disabilities. This project was developed in partnership with MSP Inc. The project is financed with a combination of section 42 tax credits and federal HOME funding.*
- **North Lawn Avenue - Madison, WI**
 - *Redevelopment of existing older single-family home into a fully accessible rental duplex*
- **North Port - Glendale, WI**
 - *10-unit affordable rental project integrated within a 40 unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding*
- **Pinney Lane - Madison, WI**
 - *18 units of supported housing as part of a 70 mixed income, mixed use section 42 project carried out as a joint venture with ACC Development on the near East side of the City of Madison as part of a 28- acre redevelopment on a former brownfield called Royster Crossing.*
- **Pioneer Ridge Apartments – Wisconsin Dells, WI**
 - *18 units of supported housing integrated into a 72 unit mixed income section 42 financed projects located on Northeast section of Wisconsin Dells. This project is a joint venture with Mirus Partners.*
- **Shawano Duplex - Shawano, WI**
 - *Construction of a fully accessible rental duplex*
- **Stonebridge - Madison, WI.**
 - *12-unit affordable rental project integrated within a 300 unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding*
- **West Bend – West Bend, WI**
 - *Acquisition and rehabilitation of a fully accessible rental duplex*

Dane County Housing Authority

Dane County Housing Authority – *Housing Authority and Co-owner*

The Dane County Housing Authority (DCHA) will be providing 8 project-based Section 8 rental vouchers to the project and will be the third member of the managing member ownership entity that will co-own the project with the tax credit investor.

The Dane County Housing Authority (DCHA) is a Public Body that was established by the Dane County Board in 1972 to provide affordable housing to the low-income residents of Dane County. The mission of DCHA is to promote adequate and affordable housing, economic opportunity, and a suitable living environment free from discrimination. The oversight and governance of DCHA is the responsibility of a five-member citizen commission appointed by the Dane County Executive. They are responsible for formulating DCHA policy. They are dedicated and committed volunteers that bring an array of knowledge and abilities to DCHA. They are representatives of the following sectors of our community: government (County Board, State), law, non-profit, real estate, and housing development & consulting.

The Dane County Housing Authority Board of Commissioners consists of:

Daniel O'Callaghan, Chair

Mary Kolar, Vice-Chair

Bill Perkins

Melissa Huggins

Harold Rayford

Hayley Young

The Dane County Housing Authority administers the Section 8 Housing Choice Voucher Program providing eligible families and individuals the opportunity to rent homes of their choice in the private sector. Dane County Housing Authority provides more than 6 million dollars annually into our community to landlords through rent subsidies each year. Dane County Housing Authority has an allocation of 1,211 vouchers through the Department of Housing and Urban Development (HUD).

The Dane County Housing Authority owns 281 units of housing throughout Dane County. Eighty-six of those units are funded by the Department of Housing and Urban Development through its Low Rent Public Housing Program. 70 units are funded through USDA Rural Development and the HUD Section 515 Program. 36 are Section 42 Low Income Housing Tax Credit units. The remainder are unsubsidized units that the DCHA makes available to families at or below 60% of County median income at no more than the HUD published Fair Market Rents for Dane County.

The DCHA director is Robert Dicke. He has been working in Real Estate and Property Management since 1995. He has spent much of that time working on affordable housing and in low income areas. Robert received a bachelor's degree in Sociology from the University of Minnesota and has obtained a Wisconsin Real Estate Broker's license, a Certified Occupancy Specialist designation and a LIHTC Site Compliance Specialist certification. He has served on the Capital Region Sustainable Communities Consortium, the Emergency Food and Shelter Board, The Dane County Foreclosure Taskforce Board, The Homeless Services Consortium Board and the Wisconsin Council for Affordable Rural Housing Board. Robert has been an active member in the Delegation to Create Economic Stability for Young Families, the Affordable Housing Action Alliance, the Burr Oaks Housing Providers group, the Leopold Area Resource Committee and the Apartment Association for South Central Wisconsin.

The Dane County Housing Authority has been successful in obtaining Section 42 Low Income Housing

Tax Credits both on its own and through its partnership with Developers. DCHA received a 4% LIHTC award in 2017 for its \$6.7 million acquisition and rehabilitation of a scattered site Rural Development portfolio. In addition, DCHA has been awarded 9% LIHTC on the following projects in which DCHA was sponsor or co-developer:

- Meadow Ridge Middleton/JTKlein Inc
- Phase 1 and Phase 2 8Twenty South Park/JTKlein Inc
- Broadway Square Apartments/Royal Capital Group (was not built due to zoning issues)
- Main Street Sun Prairie/Gorman and Co
- Oak Ridge Middleton/JTKlein Inc
- The Grove Apartments/MSP Real Estate

In addition to these projects, the Dane County Housing Authority has a long history of Public private joint ventures for the creation of Affordable Housing. Projects and Partners include:

- The Uplands Apartments/ACC Management.
- Fairway Glen/Movin' Out
- Madison and Main/Movin' Out
- Supportive Housing on Rethke/CDA of Madison
- The Mifflander/Madison Development Corp
- Tree Lane Supportive Housing/CDA of Madison
- Mifflin Street Apartments/Stone House Development
- Sanderson School Apartments/Dane County
- Madison on Broadway/Movin' Out

All the above projects have an affordable housing component. Most set aside for individuals or families at or below 50% of County Median Income. In addition, 272 of OCHA's 281 owned units are set aside for no higher than 60% of CMI.

Syncromatic Construction

Syncromatic Construction – *General Contractor*

Syncromatic Construction (“Syncromatic”) was founded in 2015 and is focused on the construction of multifamily properties. To date Syncromatic has been involved in the construction of approximately 1,000 units valued in excess of \$70 million:

- 2 Oaks Apartments – New Orleans, Louisiana (400 Units)
- The Element – Sun Prairie, Wisconsin (240 Units)
- Linden Cohousing – Madison, Wisconsin (48 Units)
- Meadowlawn Plaza – Mitchell, South Dakota (105 Units)
- Park Crest Apartments – Madison, Wisconsin (128 Units)
- Pioneer Ridge – Wisconsin Dells, Wisconsin (72 Units)
- The Royal – Madison, Wisconsin (48 Units)

Dimension IV – Madison Design Group

Dimension IV – Madison Design Group – *Architect*

See Attached Statement of Qualifications from Dimension IV – Madison Design Group

MULTIFAMILY HOUSING



STATEMENT OF QUALIFICATIONS 2018



architecture · interior design · planning

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MISSION STATEMENT

We will provide thorough, attentive services to our clients, listening to user needs, introducing and exploring innovative ideas with a goal of providing creative, functional and affordable architecture that is sustainable and will stand the test of time.

COMPANY INFORMATION

Name and Address of Firm

Dimension IV Madison Design Group

6515 Grand Teton Plaza, Suite 120
Madison, Wisconsin 53719

Phone: 608.829.4444
Fax: 608.829.4445

Principals/Owners of Firm

Jim Gersich, AIA, RLA, WRID
Jerry Bourquin, AIA
Ron Siggelkow, AIA
Ray White, AIA
Sheila Ace
Tina Gordon, NCIDQ

Primary Contact: Jerry Bourquin
jbourquin@dimensionivmadison.com
608.829.4452

Staff

Currently our staff consists of 17 design professionals and technical support staff, each of whom provides a unique contribution to our success. Seven of our design professionals are licensed in architecture, two are LEED® Accredited Professionals, and one of our principals is registered in multiple disciplines.



Dimension IV Madison Staff

OVERVIEW OF FIRM

Dimension IV Madison Design Group has both a keen interest and **proven expertise** in the planning and design of many types of residential housing, including multifamily residential developments involving tax credits, WHEDA, IHEDA, and HUD funding and requirements, and lender verifications. We approach these projects with care, attention and respect.

We are a design firm offering architecture, interior design, site planning, and landscape architecture services for new construction, additions, renovations, and remodeling projects. Collectively, our staff has over 200 years of experience, representing decades of work on projects ranging from a few thousand square feet to hundreds of thousands of square feet. We like what we do, and we take pride in doing it well.

The foundation of our firm is built on a vision of architecture and professional service that puts the client and users, the building function, and the project budget at the forefront. We take a **collaborative approach** to each and every project, enhanced by a willingness to **listen carefully** to the needs, wants, dreams, and concerns of the client and users. We greatly enjoy teamwork and collaboration and view them as critical to a highly successful design process

and outcome. Our projects stay within budget, often come in under budget, and have minimal, if any, change orders. We have always met the project schedule.

Dimension IV Madison Design Group brings a depth of experience working to creatively solve design challenges. Our in-house team of architects and interior designers will work diligently and interactively with you to develop **creative, cost-effective solutions** to meet your needs. Our team enjoys a highly participatory, consensus-building process leading to great solutions and satisfied clients.

We take great pride in our services and success. Our team brings the unique qualities to your project of:

- **A Proven Construction Team Member**
- **Experience and Ability**
- **Past Knowledge**
- **Forward Vision**
- **Quality of Life**
- **Value**



Before

Arcadia Housing Redevelopment, Arcadia, Wisconsin



After

Services

Dimension IV Madison Design Group offers a broad range of services with our in-house staff. We customize our services to better serve each client and successfully deliver each project.

Design Architecture

Complete design services, from concepts to construction documents and specifications for new buildings, additions, renovations, and facility maintenance and improvement projects.

Planning

Program development, long-range facilities planning, feasibility studies, adaptive reuse analysis.

Site Planning and Design

Master planning, campus planning, site selection, parking studies, site lighting, site development, and landscaping.

Sustainable Design

LEED® certification, Energy Star, sustainable sites, rain gardens, water efficiency, energy efficiency, materials and resources (reuse, recycling, and reduction), indoor air quality.

Interior Design

Space planning, space programming, tenant improvements, FF&E (furniture, fixtures, equipment) specification and procurement, materials, colors, signage, physical relocation assistance/coordination, equipment inventories.

Building Evaluations

Code and life safety analysis, accessibility compliance, renovation/expansion feasibility, review of technology deficiencies, building energy performance, long-term maintenance and cost analysis.

Space Needs Assessments

Surveys of current and projected space needs, functional relationships, equipment and furnishings space requirements, departmental and workflow analysis.

Historic Architecture

Research and design for restoration, renovation, and adaptive reuse of historic buildings.

Project Management

Conceptual budgets, scheduling, construction delivery, system analysis, quality control, project phasing.

Cost Estimating

Analysis for life-cycle costing, cost/benefit analysis, detailed project cost estimating.

Construction Administration

Site observation, shop drawing review, progress reports, contractor payment certifications, post occupancy follow-up.

Other Services

Renderings, model making, 3-D graphics, building information modeling, lender verification (construction) services.



Heritage of Monona Senior Living Community, Monona, Wisconsin

Ryan Hainey Photography

RELEVANT PROJECT EXPERIENCE

The individual project experiences of our seasoned staff are wide-ranging. The following is a sample of our WHEDA, IHEDA, and tax credit housing experience.

PROJECT NAME / LOCATION	PROJECT DESCRIPTION
Bell Tower Place West Allis, Wisconsin	New, 1980,000 square foot senior living community. Four-story 122 unit independent living apartment building; one-story 38 unit memory care facility; two-story 40 unit assisted living apartment building.
Washburn Housing Authority Washburn, Wisconsin	Rehabilitation and weatherization of multifamily units in multiple buildings, including site improvements, common space renovations, window and door replacement, new interior finishes, porch additions, and MEP/FP upgrades.
Beloit Apartments Redevelopment Phase 2 Beloit, Wisconsin	New and remodeled senior and family apartments, renovated single-family homes, and remodeling of existing administration building. <i>A Daily Reporter 2012 Top Project Winner.</i>
Heritage Apartments Brillion, Wisconsin	Rehabilitation of 23 multifamily units into a Residential Care Apartment complex. <i>A Daily Reporter 2010 Top Project Winner.</i>
Revival Ridge Apartments, CDA Madison, Wisconsin	Five new buildings, 49 new residential apartment units; two buildings with underground parking. <i>A Daily Reporter 2009 Top Project Winner.</i>
Lime Tree Terrace & Park View Apartments Green Bay, Wisconsin	Rehabilitation of 36 units at Lime Tree and 48 units at Park View. Work included interior remodeling, new exterior finishes, MEP systems, and a freestanding community center building.
Oak Grove Apartments Horicon, Wisconsin	Rehabilitation of 24 multifamily units in four buildings; construction of 24 garages and a maintenance storage garage.
Arcadia Housing Arcadia, Wisconsin	Rehabilitation and weatherization of 40 multifamily units in four, one-story buildings.
Walworth County Apartments Wisconsin	Rehabilitation of 50 apartments in Elkhorn, and 69 apartments and 16 units of family housing in Lake Geneva.
Shelter Properties Senior Apartments Wisconsin	Rehabilitation of 150 senior housing apartments located in Albany, Belleville, Deerfield, Fox Lake, Orfordville, Pardeeville, and Randolph.
Heritage of New Berlin Senior Housing New Berlin, Wisconsin	New 34 unit, three-story senior independent living building; a Wisconsin Green Built Homes project.
Normandy Square Madison, Wisconsin	Mixed-use redevelopment. Four-story rental apartment building with 73 units; 86,930 square feet of housing; 2,380 square feet of commercial space on the first floor; 35,348 square feet underground parking; covered parking for 72 bicycles.

PROJECT NAME / LOCATION	PROJECT DESCRIPTION
Truax Park Apartments, CDA Madison, Wisconsin	Renovation and additions to six existing, three-story buildings. A <i>Daily Reporter</i> 2011 Top Project Winner.
University Garden Apartments Whitewater, Wisconsin	New 12,000 square foot community building, including laundry room, offices, and community room, attached to existing building with a covered walk.
Heritage of Middleton Senior Living Community Middleton, Wisconsin	172,000 square foot senior living community with independent living apartment building, memory care, assisted living, underground parking.
Hillside & Parkside Apts Whitehall, Wisconsin	Rehabilitation, weatherization and connecting common area addition for two existing multifamily apartment buildings.
La Corona Apartments Milwaukee, Wisconsin	Rehabilitation of 55 units of housing, including an addition with exercise room, beauty parlor, and computer room.
Burr Oaks Senior Housing Madison, Wisconsin	New independent living facility. Three-story building with 50 one- and two-bedroom rental apartments. A Wisconsin Green Built Homes project.
Diamond View Apartments Wausau, Wisconsin	Eleven buildings, 158 family units, remodeling of townhomes/apartments, including windows and patio doors, cabinets, electrical, site work, flooring, mechanical, appliances, interior finishes, accessibility analysis
Oshkosh Court Tower Renovation Oshkosh, Wisconsin	Complete interior renovation of a 14-story, 1970s apartment building. The 156 existing apartments were reconfigured to create 93 two-bedroom units and 11 efficiency units.
Spring Village Apartments Davenport, Iowa	Rehabilitation and weatherization to increase energy efficiency of 120-unit apartment building, including new windows, flooring, cabinets, mechanical, plumbing, and accessibility modifications; written needs assessment report.



Truax Park Apartments, Madison, Wisconsin

RELEVANT PROJECT EXPERIENCE

PROJECT NAME / LOCATION	PROJECT DESCRIPTION
<p>Scattered Sites Wisconsin</p>	<p>Rehabilitation and weatherization of 1,076 apartments at over 30 locations throughout the state, including site improvements, common space renovations, window and door replacement, new interior finishes, and mechanical, electrical, plumbing and fire alarm system upgrades. Some locations also included office or community room additions.</p>
<p>Veteran Housing Redevelopment Milwaukee, Wisconsin</p>	<p>Rehabilitation, repairs, and upgrades to buildings on five sites in Milwaukee. Work included new roofs, windows, siding, masonry repairs, new appliances, interior doors, flooring/base, concrete repairs, new building entry doors, cabinets, and countertops.</p>
<p>Heritage of Monona Senior Living Community Middleton, Wisconsin</p>	<p>Senior living community with independent living apartment building, memory care, assisted living, underground parking.</p>
<p>Park Vernon, Dane County Housing Authority Stoughton, Wisconsin</p>	<p>Rehabilitation of 23 units, including new exterior finishes, new interior finishes and fixtures, and building upgrades.</p>
<p>Park Verona, Dane County Housing Authority Verona, Wisconsin</p>	<p>Rehabilitation of 23 units, including new exterior finishes, new interior finishes and fixtures, and building upgrades.</p>
<p>Summerhill Apartments, Dane County Housing Authority De Forest, Wisconsin</p>	<p>Rehabilitation of eight apartments, including new exterior finishes, new interior finishes and fixtures, and building upgrades.</p>
<p>Greenwood Manor Apts Ladysmith, Wisconsin</p>	<p>Rehabilitation of senior and family housing apartments. Senior living consisted of a 3-story, 38-unit building; family living consisted of 16 townhomes in four buildings.</p>
<p>Northwinds Apartments Manitowoc, Wisconsin</p>	<p>Rehabilitation of six existing buildings: 4, 8-plex buildings; one, 4-plex building; and one town house for a total of 40 units. Also new office addition.</p>
<p>Two Rivers Edgewater Terrace Apartments Manitowoc, Wisconsin</p>	<p>Rehabilitation of four family townhomes and 36 apartments including new siding, windows and blinds, cabinets, patio doors, new roof, downspouts, exterior lighting, intercom and security system, new clubhouse/office, new interior finishes and building upgrades.</p>
<p>Hilltop Manor Apartments Spooner, Wisconsin</p>	<p>Rehabilitation of senior apartments and family townhomes, including new signage, intercom system, carpet, cabinets and countertops, windows, siding, exterior doors, elevator, flooring, lighting, asphalt paving, appliances, playground equipment, unit entry doors, common area painting.</p>

Below is a partial list of our firm's other multifamily housing experience.

PROJECT NAME / LOCATION	PROJECT DESCRIPTION
Oakwood Village Prairie Ridge Madison, Wisconsin	Master planning for campus expansion, including design of new 96 unit independent living apartment building with below-grade parking, design of a new 40-bed, 34,000 square foot skilled nursing facility, new 300 person auditorium, new physical therapy addition and city entitlements.
Oakwood Village University Woods Madison, Wisconsin	Master planning for campus expansion and improvements, including design of 125 unit independent living apartment building with two levels of underground parking and skywalk/corridor connection to existing building, and city entitlements for the overall master plan.
Oakwood Village University Woods Madison, Wisconsin	Interior renovation projects, including Tower Apartment building renovations and apartment upgrades, Hebron Oaks upgrades, and Village Inn multiuse room interior upgrades.
Oak Park Place Madison, Wisconsin	Retirement community, including 72 units of assisted living, 100-bed skilled nursing facility, and 75 units of senior condominiums.
Oshkosh Assisted Living Oshkosh, Wisconsin	New 15-acre residential development, including 25 single-family homes, and two, 25-bed assisted living facilities.
Capitol West Condominiums Madison, Wisconsin	143,000 square foot, mixed-use redevelopment project, including 126 unit condominium tower, 15 townhomes, and retail space. The townhomes received the Commercial Design Award for Best New Multiunit Residential Development by <i>In Business</i> magazine, May 2009.
Metropolitan Place Condominiums Phase II Madison, Wisconsin	164 condominium unit addition, parking garage expansion, landscaped roof terrace, custom residential design.
University Apartments, UW-Parkside Kenosha, Wisconsin	Upgrades, repairs, and renovations to the exterior envelope of seven student apartment buildings.



Heritage of Middleton Senior Living Community, Middleton, Wisconsin

Ryan Hainey Photography

RELEVANT PROJECT EXPERIENCE

PROJECT NAME / LOCATION	PROJECT DESCRIPTION
Sacred Heart at Monastery Lake Franklin, Wisconsin	New apartment complex for the Priests of the Sacred Heart, including apartments for active and retired priests, and independent apartments for seniors.
The Buckler Apartments Milwaukee, Wisconsin	Adaptive reuse of an 11-story, 286,000 square foot office building to apartment living in downtown Milwaukee. The project received the 2016 <i>Milwaukee Business Journal</i> Real Estate Awards Best Renovation-Residential.
Sigma Phi Epsilon Fraternity Madison, Wisconsin	New fraternity house to replace house destroyed by fire on same site. 19 rooms for 38 residents with one live-in housekeeper.
Middleton Hills Middleton, Wisconsin	Part of the Middleton Hills “new urbanism” development. Located in the town center, it has commercial space on the first floor and residential apartments on the upper level.
Murray Glen Apartments Phases 1 & 2 Verona, Wisconsin	Market-rate multifamily housing; 76 apartments with basement parking garage. The three buildings are two stories with a community area that includes a fitness center, club room, leasing office, and patio.
Rothschild Assisted Living Rothschild, Wisconsin	New 12,000 square foot assisted living facility providing a comfortable home for 20-22 residents with dementia.
Bellarmino Student Housing Center Kansas City, Missouri	New five-story student housing building with 100 apartments ranging from studios to 4-bedroom units.
222 State Street Madison, Wisconsin	Adaptive reuse of building/vacant space. Four-story building renovation with two retail spaces on the first floor and eight apartments on the other three floors.
Treysta on the Water Monona, Wisconsin	Five-story luxury apartment/mixed-use development. First floor with retail/restaurant space, 18 apartments and a common courtyard. The building has 124 apartments; the top floor includes two-story penthouse suites.
Promontory Madison, Wisconsin	Mixed-use condominium development with 44 residential condominiums, ground floor retail, and parking garage.
Monona Drive Condominiums Monona, Wisconsin	Five-story luxury, lake front condominium building with 11 units ranging in size from 1,800 square feet to 4,500 square feet; including underground parking, a fitness center, and meeting room.
LaVille Student Apartments Madison, Wisconsin	Renovation of high-rise student housing tower to convert existing multilevel penthouse common spaces into new student apartments.
Blessed Sacrament Senior Housing Madison, Wisconsin	New 3-story apartment building for priests and seniors connected to the Blessed Sacrament Parish.

PROJECT TEAM & RESUMES



Murray Glen Apartments, Verona

Key Personnel

To ensure the success of your project, we bring together an experienced team that enjoys working together and is committed to the success of our clients. This team is committed for the duration of the project.

Our team would typically include:

Principal-in-Charge/Project Manager
Interior Designer

Jerry Bourquin, AIA
Tina Gordon, NCIDQ

Additional in-house design and technical staff are added, as needed, as the project develops. Depending upon the scope of the work, subconsultants may also be added to the project team.

On our **expertise**:

"First, I have been most impressed by the expertise that you and your people have brought to my project. Time after time you have made suggestions that have either improved the design and/or have made significant cost reductions in the project."

Rick Meier, President
Saddlebrook Investment Group

RESUME

JERRY BOURQUIN, AIA

Experience

**Principal
Managing Partner
Architect
Cost Estimator
30+ years of experience**

Registration/Accreditation

**Registered Architect in
Wisconsin (1980)**

**Registered Architect in
Illinois (1980)**

**Registered Architect in
Vermont (2011)**

**Registered Architect in
Missouri (2012)**

**Registered Architect in
South Dakota (2013)**

**Certified WHEDA Capital Needs
Assessment (CNA) Provider**

Education/Training

**Master of Architecture,
University of Illinois,
Urbana-Champaign (1978)**

**Bachelor of Architectural
Studies, University of Illinois,
Urbana-Champaign (1976)**

Organizations/Committees/ Memberships

**American Institute of
Architects (AIA)**

**National Council of
Architectural Registration
Boards (NCARB)**



Sacred Heart at Monastery Lake, Franklin, Wisconsin

As the Principal-in-Charge/Project Manager Jerry would directly manage the project through all its phases, be responsible for ensuring the design meets all your needs, and for keeping the project on schedule and within budget. Some of his relevant work experience follows:

- Oak Grove Apartments, Horicon, Wisconsin
- Bell Tower Place, West Allis, Wisconsin
- Normandy Square, Madison, Wisconsin
- Arcadia Housing Redevelopment, Arcadia, Wisconsin
- Hillside and Parkside Apartments, Whitehall, Wisconsin
- Washburn Housing Authority, Washburn, Wisconsin
- Veteran Housing Redevelopment, Milwaukee, Wisconsin
- Park Vernon, Park Verona, Summerhill Apartments, Wisconsin
- Lime Tree Terrace & Park View Apartments Rehabilitation, Green Bay
- Rothschild Assisted Living, Rothschild, Wisconsin
- Plymouth Assisted Living Phase 3, Plymouth, Wisconsin
- Two Rivers Edgewater Terrace Apartments, Manitowoc, Wisconsin
- Heritage of Monona Senior Living Community, Monona, Wisconsin
- Hilltop Manor Apartments, Spooner, Wisconsin
- Heritage of Middleton Senior Living Community, Middleton, Wisconsin
- La Corona Apartments, Milwaukee, Wisconsin
- 222 State Street Building Renovation, Madison, Wisconsin
- Treysta on the Water, Monona, Wisconsin
- Murray Glen Apartments, Verona, Wisconsin
- The Buckler Apartments, Milwaukee, Wisconsin
- Sigma Phi Epsilon Fraternity, Madison, Wisconsin
- Sacred Heart at Monastery Lake, Franklin, Wisconsin
- Heritage Apartments, Brillion, Wisconsin
- Walworth County Apartments, Elkorn & Lake Geneva, Wisconsin
- Shelter Properties Senior Apartments, Multiple Sites, Wisconsin
- Heritage of New Berlin Senior Housing, New Berlin, Wisconsin
- Bellarmino Student Housing, Kansas City, Missouri

RESUME

TINA GORDON, NCIDQ, IIDA

Experience

**Principal
Interior Designer
18 years of experience**

Registration/Accreditation

**NCIDQ Certified Interior
Designer**

Education/Training

**Bachelor of Fine Arts in Interior
Design, Iowa State University,
Ames, Iowa (1998)**

Organizations/Committees/ Memberships

**International Interior Design
Association (IIDA)**

Girl Scout Volunteer

**Board of Trustees, Waterloo
United Methodist Church**

Along with the more traditional interior design services, Tina can provide full furniture, fixtures and equipment (FF&E) services. FF&E services are integrated from the beginning of the design process in terms of layout, evaluating existing vs. new, matching FF&E to the interior architecture, FF&E selection, and the coordination of the procurement of all FF&E, keeping within the client's budget.



Capitol West Condominiums, Madison

As the Interior Designer for the project, Tina works hand-in-hand with the Architect to create a harmonious relationship between the interior and exterior architecture. Her responsibilities include producing aesthetic concepts, detailing the interior environment, selecting proper finishes and materials, and choosing the appropriate lighting concepts. Some of Tina's relevant work experience includes:

- Revival Ridge Apartments, CDA, Madison, Wisconsin
- Bell Tower Place Senior Living Community, West Allis, Wisconsin
- Capitol Lakes, Sage Wing Assisted Living, Madison, Wisconsin
- Metropolitan Place Phase II, Madison, Wisconsin
- Oakwood Village University Woods, Madison, Wisconsin
- Oakwood Village Prairie Ridge, Madison, Wisconsin
- Beloit Apartments Redevelopment, Phase 2, Beloit, Wisconsin
- Truax Park Apartments, CDA, Madison, Wisconsin
- Sacred Heart at Monastery Lake, Franklin, Wisconsin
- Vistas at Greenwood Hills, Wausau, Wisconsin
- Burr Oaks Senior Housing, CDA, Madison, Wisconsin
- Movin Out, North Port Village, Glendale, Wisconsin
- Red Cliff Housing Redevelopment Phase 2, Bayfield, Wisconsin
- Capitol West Condominiums, Madison, Wisconsin
- Sigma Phi Epsilon Fraternity, Madison, Wisconsin
- The Buckler Apartments, Milwaukee, Wisconsin
- Middleton Hills, Middleton, Wisconsin
- Retirement Housing Foundation Capital Needs Implementation, Various Sites, Wisconsin
- Movin Out, North Port Village, Glendale, Wisconsin
- New Glarus Home Addition and Remodeling, New Glarus, Wisconsin

REFERENCES

Washburn Housing Authority, Washburn, Wisconsin
Arcadia Housing Redevelopment, Arcadia, Wisconsin
Bayfield County Housing Authority, Bayfield, Wisconsin
Hillside and Parkside Apartments, Whitehall, Wisconsin
Brillion Heritage Housing, Brillion, Wisconsin
Hirsch Group, LLC

Rehabilitation of multifamily units in multiple buildings, including site improvements, common space renovations, window and door replacement, new interior finishes, and mechanical, electrical, plumbing and fire alarm system upgrades. Design in conjunction with the Hirsch Group. All projects WHEDA funded.

Contact Person: Thomas Hirsch
Hirsch Group, LLC
14 North Allen Street
Madison, Wisconsin 53726
Phone Number: 608.233.7797

Revival Ridge Apartments, Madison, Wisconsin
Truax Park Apartments, Madison, Wisconsin
Burr Oaks Senior Housing, Madison, Wisconsin

Design services new construction and renovation. WHEDA funded projects.

Contact Person: Natalie Erdman, Executive Director
Community Development Association
Madison Municipal Building
215 Martin Luther King, Jr. Boulevard
Madison, Wisconsin 53703
Phone Number: 608.267.1992

Bell Tower Place Senior Living Community, Madison, Wisconsin

Design services for new 198,000 square foot senior living community consisting of a four-story, 122 unit independent living apartment building; a one-story, 38 unit memory care facility; a two-story, 40 unit assisted living apartment building; common areas; dining facilities; and below-grade parking. WHEDA funded project.

Contact Person: Milo Pinkerton
MSP Real Estate Group
7201 Walker Street, Suite 20
Minneapolis, Minnesota 55426
Phone Number: 952.351.4540

Albion Apartments Remodel, Milwaukee, Wisconsin
La Corona Apartments, Milwaukee, Wisconsin
Diamond View Apartments, Wausau, Wisconsin
Lime Tree Terrace and Park View Apartments Rehabilitation, Green Bay, Wisconsin
Shelter Properties, Wisconsin
University Garden Apartments, Whitewater / Veteran Housing Redevelopment, Milwaukee
WHEDA funded rehabilitation projects through **Cardinal Capital Management**

Contact Person: Mark Klann
Cardinal Capital Management
135 South 84th Street, Suite 100
Milwaukee, Wisconsin 53214
Phone Number: 414.727.9902

Heritage of Monona Senior Living Community, Monona, Wisconsin
Heritage of Middleton Senior Living Community, Middleton, Wisconsin
Heritage of New Berlin Senior Housing, New Berlin, Wisconsin / Normandy Square, Madison, Wisconsin
MSP Real Estate Group

Monona: Design services for new 160,000 square foot senior living community consisting of a four-story, 87 unit independent living apartment building, and a two-story, 38 unit memory care facility with 37 assisted living apartments; common areas; dining facilities; and below-grade parking. WHEDA funded project.

Middleton: Design services for new 134 unit senior housing campus development consisting of a four-story building with 56 units of independent living apartments, and a two-story assisted living/memory care community. WHEDA funded project.

New Berlin: Design services for new 34 unit, three-story senior independent living building; a Wisconsin Green Built Homes project. WHEDA funded.

Normandy Square: Design services for 4-story, mixed-use redevelopment; 86,930 square feet of housing; 2,380 square feet of commercial space.

Contact Person: Milo Pinkerton
MSP Real Estate Group
7201 Walker Street, Suite 20
Minneapolis, Minnesota 55426 / Phone Number: 952.351.4540



Ryan Hainey Photography



Ryan Hainey Photography

Heritage of Middleton Senior Living Community, Middleton

CAMEOS

Bell Tower Place

Oshkosh Court Tower Renovation

Truax Park

Revival Ridge Apartments

Capitol West

Sacred Heart at Monastery Lake

Sigma Phi Epsilon Fraternity

Burr Oaks Senior Housing

Heritage of Monona Senior Living Community

Bellarmino Student Housing

The Buckler Apartments

Treysta on the Water

BELL TOWER PLACE SENIOR LIVING COMMUNITY



Project Description

Bell Tower Place Senior Living Community provides the independence of senior apartments with the comforting security of attached assisted living.

Residents enter the community from the covered drop-off through a two-story lobby with a dramatic stone fireplace.

Dining services are provided for all residents, with each facility having its own dining area. The independent and assisted living facilities share a common space that includes a hair salon, pub/social area, library and private dining rooms.

The memory care facility has its own entrance from a different side of the building to create its own identity, and a secure, interior courtyard.

The 1,800 square foot commercial kitchen in the assisted living facility provides meals for the entire community.

Project Type	New Senior Living Community
Project Location	West Allis, Wisconsin
Completion Date	2010
Client	MSP Real Estate
Reference	Milo Pinkerton MSP Real Estate 7201 Walker Street, Suite 20 St. Louis Park, Minnesota 55426 Phone: 952.351.4540
Project Data	198,000 Square Feet 122 Independent Apartments 40 Assisted Living Apartments 38 Memory Care Units Below-Grade Parking
Construction Cost	\$14,460,000



OSHKOSH COURT TOWER RENOVATION



Project Description

Complete interior renovation of a 14-story 1970s apartment building.

The 156 existing apartments were reconfigured to create 93 two-bedroom units and 11 efficiency units.

Existing mechanical and electrical systems were upgraded or replaced, a fire sprinkler system installed, and new finishes provided throughout the building.

Expanded common amenities, such as a fitness center, business center, café, and video theater were included.

As part of the renovation and expansion of common spaces, a small addition provides a new public entrance with a covered passenger drop-off.

In addition to general site improvements, enclosed garages were constructed for half of the apartment units. Exterior balconies were added to each renovated apartment.

Project Type	Interior Renovation
Project Location	Oshkosh, Wisconsin
Completion Date	December 2013
Client	Oshkosh Housing Authority
References	Su van Houwelingen Oshkosh Housing Authority P. O. Box 397 Oshkosh, Wisconsin 54903-0397 Phone: 920.424.1450 ext 112
Square Footage	103,900
Construction Budget	\$13,500,000
Award	2013 Top Project Award from the <i>Daily Reporter</i>



TRUAX PARK APARTMENTS REDEVELOPMENT, PHASE I



Project Description

Additions and renovations to six existing 12 unit apartment buildings, three-stories plus basement. Two apartments were converted into one, larger unit.

Work included complete interior renovation, stair and elevator additions, rehabilitation of existing stairs, new shingle roofing, new EIFS finish, new brick masonry, new balconies, and additional roof and wall insulation.

A 2011 Top Project Winner selected by *The Daily Reporter* and *Wisconsin Builder* magazine.

Project Type	Exterior & Interior Renovation/Addition
Project Location	Madison, Wisconsin
Completion Date	2011
Client	Madison Community Development Authority
Reference	Natalie Erdman, Executive Director Community Development Authority 215 Martin Luther King, Jr. Boulevard Madison, Wisconsin 53703 Phone: 608.267.1992
Project Data	91,620 Square Feet 71 Apartments
Construction Cost	\$8,291,793
Award	2011 Top Project Winner



REVIVAL RIDGE APARTMENTS



Project Type	New Multifamily Residential
Project Location	Madison, Wisconsin
Completion Date	2009
Client	Community Development Authority
Reference	Natalie Erdman, Executive Director Community Development Authority Madison Municipal Building 215 Martin Luther King Jr. Boulevard Madison, Wisconsin 53703 Phone: 608.267.1992
Architects	Dimension IV Madison Design Group - Architect of Record epstein uhen: architects - Design
Project Data	49 dwelling units 82,861 square feet \$6,314,917 construction cost WHEDA tax credits
Awards	A 2009 Top Project Winner, selected by the <i>Daily Reporter</i> and <i>Wisconsin Builder</i> magazine





Project Description

Dimension IV Madison Design Group is the Architect of Record for this project of 49 residential units in five buildings, two with underground parking. The project qualified for an MGE energy efficiency grant and was designed to meet LEED® Silver certification requirements for new home construction.

Building A: 19 units, 3 stories, 2- and 3-bedroom apartments, roof deck and basement parking; 31,779 square feet.

Building B: 13 units, 3 stories, 2- and 3-bedroom apartments, community room, roof deck, first floor parking; 23,339 square feet.

Building C: 9 units, 3 stories, 3-bedroom flats and town houses with attached and detached garages; 15,696 square feet.

Buildings E & F: 4 units each, 3-bedroom flats, with attached garages; 5,349 and 6,698 square feet, respectively.

Sustainable Design Features

High R-value exterior walls.

High-efficiency HVAC system.

Energy Star appliances.

Durability checklist to ensure low maintenance costs.

Apartments designed to receive Energy Star certification.

Buildings designed to meet LEED® Silver certification requirements.

Energy Star qualified windows.

Energy Star qualified electrical fixtures.

Low VOC-emitting interior materials.

Minimum 70% permeable lot to allow infiltration and reduce site runoff.

High-efficiency plumbing fixtures and fittings.

Filters to reduce particulate matter from indoor air supply.

Rain garden.



CAPITOL WEST



Project Type Mixed-use redevelopment project, including residential condominiums, townhomes, and commercial tenant space

Project Location Madison, Wisconsin

Completion Date 2008

Client The Alexander Company

Reference Tom Miller, The Alexander Company
145 East Badger Road, Suite 200
Madison, Wisconsin 53713
Phone: 608.258.5580

Square Footage 195,700 square feet (11-story building)
29,500 square feet (3- and 4-story townhomes)
10,150 square feet commercial tenant space

Construction Cost \$38,889,243 (11-story building)
\$4,827,330 (3- and 4-story townhomes)

Award The townhomes received the Commercial Design Award for Best New Multi-Unit Residential Development from *In Business* magazine May 2009.





Project Description

Capitol West is a mixed-use redevelopment of an entire city block in downtown Madison that consists of commercial tenant spaces and residential condominiums and townhomes.

Dimension IV Madison is the Architect of Record for the 126-unit condominium tower with first and second floor retail tenants. This project includes coordination with the other components of the overall redevelopment project, including a parking garage, a landscaped roof terrace, and an existing office building which is planned for future renovation.

The project features a bold, modern design style, combining a wide palette of exterior materials, including concrete, metal siding, concrete masonry, cement fiber siding, and cedar. One of the many design challenges Dimension IV Madison overcame was developing this contemporary design to meet the developer's budget and still maintain the original vision. This project adds a unique sense of place to downtown Madison and contributes an exciting feature to the city's skyline.

In addition, 15 multilevel townhomes were constructed on and abutting a three-story parking ramp. The townhomes feature terraces, walk-up entrances, private gardens, and live/work spaces. The townhomes were awarded the Commercial Design Award for Best New Multi-Unit Residential Development by *In Business* magazine in 2009.

Sustainable Design Features

Urban site with easy pedestrian connection to businesses, shopping, cultural activities and employment.

Urban site with access to numerous transit stops.

Structured parking with plazas, gardens, and townhomes over entire roof.

Reuse of existing building structure.

Redevelopment of urban site.

Construction and demolition recycling program.

Green roofs.

Rain barrels for irrigation.

Energy Star appliances.

Low-emitting interior materials.

Steel structure and wall panels with high recycled content.

Large windows for views and daylighting.

Live/work opportunities.

SACRED HEART AT MONASTERY LAKE



Project Type	Senior Living Apartments for the Priests of the Sacred Heart
Location	Franklin, Wisconsin
Completion Date	Phase I Stage I completed July 2011 Phase I Stage 2 completed July 2012 Phase II completed July 2013
Client	Priests of the Sacred Heart
Reference	Deacon David Nagel, SCJ Priests of the Sacred Heart Provincialate Office P. O. Box 289, 7373 S. Lovers Lane Road Hales Corner, Wisconsin 53130 414.427.4268
Square Footage	208,000 Phase I 106,000 Phase II
Construction Cost	\$12,800,000/Phase I \$6,929,000/Phase II
FF&E Cost	\$557,470 / Phase I \$78,675 / Phase II

Project Description

New apartment complex for the Priests of the Sacred Heart. Phase I has 46 apartment units for active and retired priests, 66 independent apartments for seniors, and two private chapels, one with seating for 200, in a four-story building with underground parking for 104 cars.

Phase II provided a third, 4-story building with an additional 64 independent living units and additional underground parking for 44 cars.

The complex includes dining rooms, a commercial kitchen, a staging kitchen, a two-story lobby, activity and fitness rooms, a sundries shop, offices and conference rooms, and is programmed to accommodate future care/assisted living functions.

Balconies are accessible from some common spaces, including a public terrace off the lobby, overlooking the lake.

The project was master planned to allow an existing residential building to remain during the first stage of construction.

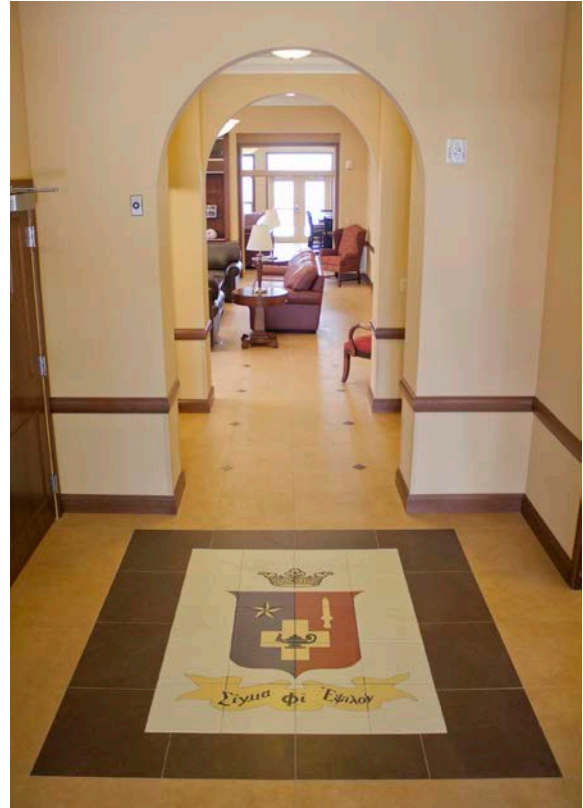
Sustainable design features include solar domestic hot water system, high efficiency windows, R-80 roof insulation, Energy Star system light fixtures throughout, and advanced lighting and HVAC controls.



SIGMA PHI EPSILON FRATERNITY



Project Type	Fraternity House
Project Location	Madison, Wisconsin
Completion Date	August 2011
Client	Sigma Phi Epsilon Fraternity
Reference	Jon Jenson, AIA, LEED® AP Division of State Facilities 101 E. Wilson Street, 7th Floor Madison, Wisconsin 53703 Phone: 608.267.7985
Square Footage	12,100 square feet
Construction Cost	\$2,208,000
Architect of Record	Dimension IV Madison Design Group
Fraternity Design Consultant	Cunningham + Associates



Project Description

New fraternity house to replace house destroyed by fire on the same site near the UW Madison campus, including meeting rooms, banquet room, training rooms, computer/study room, recreation/dining room, commercial kitchen, offices, balcony, and outdoor space for fraternity events.

There are 19 rooms for 38 residents with one live-in housekeeper. The 12,100 square foot building is three stories plus a full basement.

Designed to meet sustainable strategies equivalent to basic LEED® certification with an emphasis on energy efficiency and durability.

BURR OAKS SENIOR HOUSING



Project Description

Burr Oaks is a Senior Independent Living apartment building. The three-story building includes 50 one- and two-bedroom rental apartments. Resident amenities include a community club room, business center, kitchen, exercise area, and hair salon. A vegetable garden and play area for visiting grandchildren are provided.

A rooftop terrace is available for warm weather leisure activities, and resident parking is located beneath the building.

Burr Oaks is a Wisconsin Green Built Homes project.

Project Type	Senior Independent Living Apartments
Project Location	Madison, Wisconsin
Completion Date	2011
Client	Madison Community Development Authority
Reference	Natalie Erdman, Executive Director Community Development Authority 215 Martin Luther King, Jr. Boulevard Madison, Wisconsin 53703 Phone: 608.267.1992
Square Footage	51,120 square feet of occupied space 17,600 square foot basement garage
Construction Cost	\$5,042,062



Rooftop Terrace

HERITAGE OF MONONA SENIOR LIVING COMMUNITY



Ryan Hainey Photography

Project Type	New Senior Living Community
Project Location	Monona, Wisconsin
Completion Date	October 2009 (Phase 1) November 2012 (Phase 2)
Client	MSP Real Estate
Reference	Milo Pinkerton MSP Real Estate 7201 Walker Street, Suite 20 St. Louis Park, Minnesota 55426 Phone: 952.351.4540
Project Data	199,241 square feet 88 Independent Apartments 37 Assisted Living Apartments 38 Memory Care Units
Construction Cost	\$14,100,000 Phase 1 \$ 4,030,000 Phase 2

Project Description

Heritage of Monona Senior Living Community is a two-phase, 232 unit senior housing campus development that provides the independence of senior apartments with the comforting security of attached assisted living.

Phase 1 of the project is a four-story building of independent living apartments, and a two-story assisted living/memory care facility, with underground and surface parking. The memory care unit has its own, secure, interior courtyard. Phase 2 includes a two-story CBRF addition with assisted living and memory care units.

Residents enter the community through a covered drop-off and two-story entrance space.

The complex includes a senior community area that houses a community pub, private party room, bank, beauty salon, library, computer center, Wii gaming center, and private dining rooms.



Ryan Hainey Photography



Ryan Hainey Photography

BELLARMINO STUDENT HOUSING



Project Type	New Catholic Student Housing Center
Project Location	Kansas City, Missouri
Completion Date	Design complete, pending city entitlements
Client	Tri-North Builders, Construction Manager
Reference	Steve Harms, AIA Tri-North Builders 2625 Research Park Drive Fitchburg, Wisconsin 53711 Phone: 608.204.7252
Square Footage	109,500 square feet

Project Description

New 5-story student housing building with 100 apartments ranging from studios to 4-bedroom units.

The project site is a former abandoned Catholic school between Rockhurst University and the University of Missouri, Kansas City.

The project includes a chapel, focus ministries offices, a fitness room, and study lounges throughout the building.

The building will be constructed over grade-level parking which will serve the housing project and the adjacent Parish Church. The gymnasium of the existing school will remain and be renovated into a new Parish Hall.

THE BUCKLER APARTMENTS



Paul Morgan Photography

Project Type	Adaptive reuse
Project Location	Milwaukee, Wisconsin
Completion Date	February 2016
Owner	CA/Phoenix Property Owner, LLC John Mangel 238 S. Wacker Drive, Suite 350 Chicago, Illinois 60606 312.683.1273
Square Footage	286,000
Construction Cost	\$23,900,000
Award	2016 <i>Milwaukee Business Journal</i> Real Estate Awards Best Renovation-Residential



Paul Morgan Photography

Project Description

Adaptive reuse of an 11-story, 286,000 square foot office building to apartment living in downtown Milwaukee. The 207 units provide a variety of plans, ranging from micro-studio to penthouse apartments, and 2 level loft units. Units range from 447 square feet to 1,806 square feet. All units are equipped with washer/dryers, stainless steel appliances, granite counters, and designer cabinets. Exterior balconies and roof patios were added for many dwelling units. Common amenities include a 24-hour concierge desk, dog spa, party room, fitness center, basketball court, conference room, courtyard with fire pit and barbeque grills, and ample resident storage. The existing basement was renovated to create an underground parking garage.

TREYSTA ON THE WATER



Project Type	Mixed-use redevelopment
Project Location	Monona, Wisconsin
Completion Date	July 2015
Client	Treysta Group
Reference	Robin Pharo Treysta Group P. O. Box 352 Mount Horeb, Wisconsin 53572 Phone: 608.514.1728
Square Footage	180,148

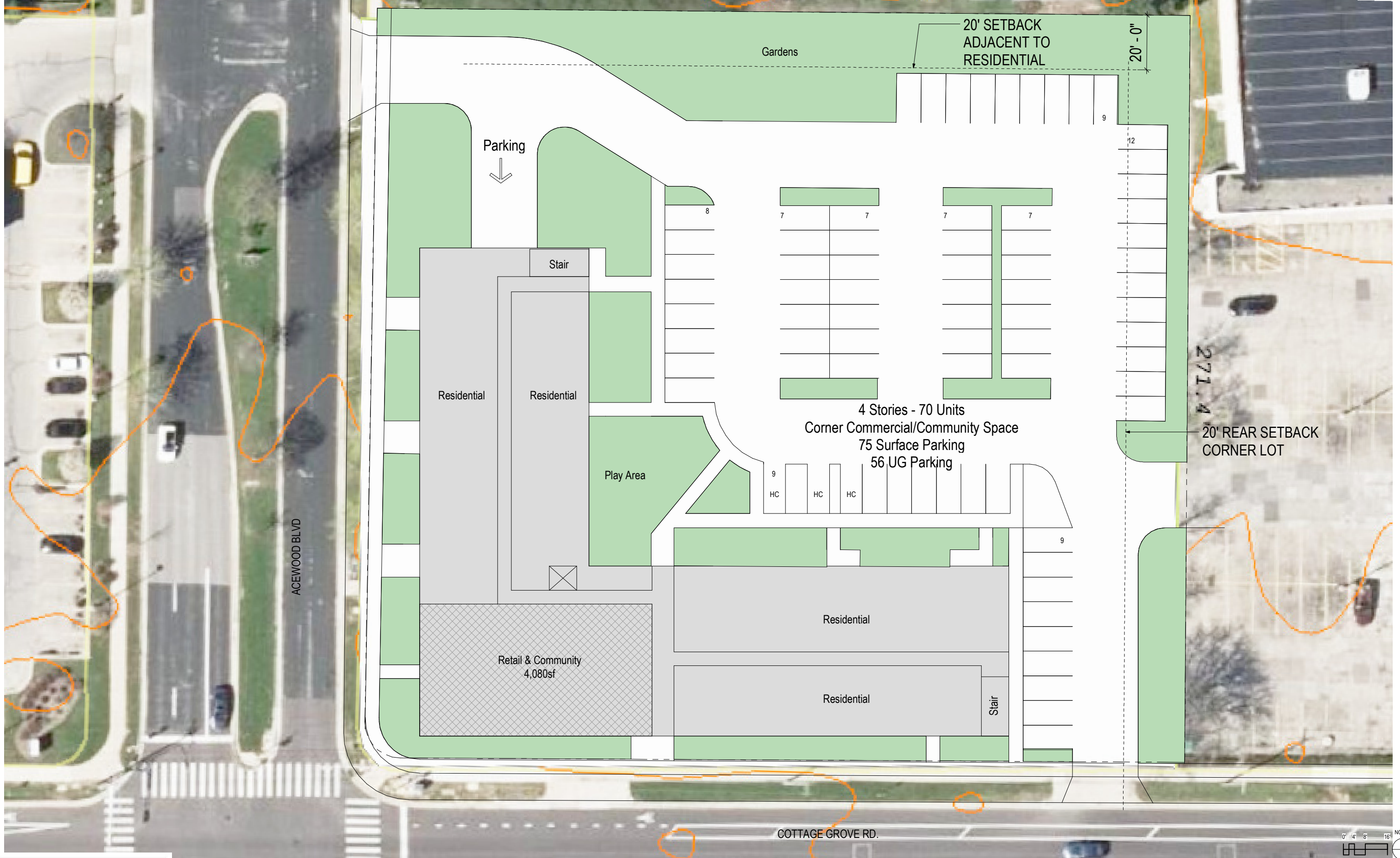
Project Description

Adaptive reuse of an 11-story, 250,000 square foot office building to apartment living in downtown Milwaukee.

The 181 units provide a variety of plans, ranging from micro-studio to penthouse apartments, and 1st and 2nd level loft units.

Exterior balconies and roof patios are being added for most dwelling units.

Common amenities include a party room, conference rooms, a roof top terrace and resident storage. The existing basement will be renovated to create a parking garage with a new drive ramp.



ACEWOOD BLVD

COTTAGE GROVE RD.

271.4

20' SETBACK
ADJACENT TO
RESIDENTIAL

20'-0"

20' REAR SETBACK
CORNER LOT

4 Stories - 70 Units
Corner Commercial/Community Space
75 Surface Parking
56 UG Parking

Parking
↓

Residential

Residential

Play Area

Retail & Community
4,080sf

Residential

Residential

Stair

Stair

9

HC

HC

HC

9

8

7

7

7

7

12

9

ACC Management Group

ACC Management Group - *Property Manager*

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

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

Other Development Team Members

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

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

Provision of Supportive Services- The Ace Apartments will provide a minimum of 16 units of supported housing. The tenants in these units will have access to a wide range of supportive services depending on their individual needs. Movin' Out will coordinate with the various service providers to ensure tenants will be successful in maintaining their housing as a foundation for stable lives. A detailed description of the assorted services likely to be available and the service system partners associated with this project can be found below in the *Supportive Services Plan* Section of this proposal.

TAB 3

Project Description

Project Description

The project site is located on the East side of the City of Madison on the corner of Cottage Grove Road and Acewood Blvd. It is located within the City of Madison's Cottage Grove Road Activity Centers Planning District. As such the Ace Apartments site is part of a larger redevelopment district created by the City of Madison called the Cottage Grove Road Activity Center. This area has been identified by the city for a targeted planning effort to analyze opportunities for creating exciting and viable neighborhood activity centers along Cottage Grove Road. This site in particular has been identified as a location the city is focusing on for redevelopment as a mixed-use project that will include economic development opportunities, affordable housing and linkages to public transportation thus it provides an excellent opportunity for families in need of affordable workforce and supported housing.

This project will develop mixed-use project including 70 units of housing and approximately 3,000 square feet of ground floor commercial space. The housing will offer a range of unit sizes, types and rent levels. There will be a single three to four story building that will include a community room, leasing office and exercise room. There will be both underground and surface parking, an outdoor playground and indoor children's play area and green space with room for community gardens.

The site currently consists of a vacant former Sentry Grocery store and paved parking area

The project is located in close proximity to all needed community services including a wide range of employers (insurance, social services, retail, manufacturing, warehousing etc.) within one mile of this location. There is a health clinic within approximately 1 mile of the site, All K - 12 schools are within 1 mile. There is a city park within ¼ mile of the site. A full-service grocery/ department store (Woodman's) is 1 mile away and a second grocery (Metro Market) 1.2 miles to the East. There is a wide range of other community services all within easy walking distance of this site.

Types of Units

The project will provide affordable housing options for a mix of family sizes and incomes. The chart below breaks out the unit types, income targeting and proposed rents. Fifty-nine units will be income restricted per the chart below. Twenty percent of the units (14) will be three-bedroom units and twenty-two percent of the units will be reserved for very low-income tenants who either have a permanent disability or are income eligible military veterans many of whom have experienced homelessness. The rent for these supported housing units will be restricted to households earning at or below 30% of area median income.

RESIDENTIAL RENTS		
Unit Type	# Units	Mo. Rent
1 bedroom (30%) – Sec. 8	3	\$773*
1 Bedroom (30%)	8	\$397
1 bedroom (60%)	1	\$875
1 bedroom (Market)	10	\$985
2 Bedroom (30%) - Sec. 8	5	\$923*
2 Bedroom (50%)	21	\$860
2 Bedroom (60%)	7	\$975
2 Bedroom (Market)	1	\$1,050
3 Bedroom (50%)	12	\$995
3 Bedroom (60%)	2	\$1,150
TOTAL	70	* Fair Market Rents

Operating Budget

The projected operating expense budget for the housing is below:

Operating Expenses		
Administration	\$55,583	\$794
Management Fee	\$43,069	\$615
Utilities	\$52,500	\$750
Maintenance/Repairs/ Grounds	\$83,542	\$1,193
Real Estate Taxes	\$75,000	\$1,071
Insurance	\$28,000	\$400
Other	\$4,400	\$63
Replacement Reserves	\$21,000	\$300
TOTAL	\$363,094	\$5,187

Development Capital Costs

The estimated development costs for the project are broken-down below. The construction costs are based on projected square foot construction costs and based on input from the general contractor. The associated soft costs are the typical types and levels consistent with affordable rental projects utilizing the types of financing this project plans on using.

	Total
Site Acquisition	\$1,600,000
Total Land Costs	\$1,600,000
Construction/Demolition	\$11,050,000
Contingency	\$542,500
Permit Fees	\$100,000
FFE	\$50,000
Total Construction Costs	\$11,742,500
Loan Fees	\$100,000
Lender Legal	\$25,000
Tax Credit Application Fee	\$2,000
Tax Credit Fee	\$96,472
Subtotal Lending/Tax Credit Costs	\$223,472

Accounting	\$20,000
Legal Building	\$90,000
Architectural/Civil Engineering	\$230,850
Survey--	\$10,000
Appraisal	\$5,000
Environmental	\$20,000
Market Study	\$6,500
Misc.	\$55,000
Subtotal Building Soft Costs	\$437,350
Title & Recording	\$30,000
Rent up/Marketing - Residential	\$30,000
Subtotal Title and Marketing	\$60,000
Real Estate Taxes During Construction	\$20,000
Construction Insurance	\$35,000
Construction Interest	\$375,000
Subtotal Construction Taxes, Fees and Insurance	\$430,000
Development Fee	\$1,335,000
Syndication Expense	\$50,000
Soft Cost Contingency	\$15,000
Subtotal Other Soft Costs	\$65,000
Rent Up Reserve	\$100,000
Operating Reserve	\$319,513
Subtotal Reserves	\$419,513
Total Soft Costs	\$2,970,335
Total Project Costs	\$16,312,835

Sources of Financing

The pro forma included in this section provides a detailed breakout of the project's development capital costs, sources of financing and projected income and ongoing operating expenses.

A summary of the proposed funding sources is in the table below. In addition to this application, the development team will be submitting an application for additional funding from the City of Madison in the amount of \$2,170,000. These funds are expected to come from the City's Affordable Housing Fund, as well as HOME Funds. Also, an application will be submitted to the Federal Home Loan Bank of Chicago for \$750,000 in Affordable Housing Grant Funding. We intend to also submit an application to WHEDA in December for a commitment of low income housing tax credits which will generate the equity investment.

The proposed financing requires the project to remain affordable for a minimum of 30 years.

First Mortgage	\$4,239,356
City Of Madison AHF/HOME	\$2,170,000
Dane County	\$500,000
FHLB-AHP	\$750,000
Deferred Fee	\$68,352
Tax Credit Equity	\$8,585,127
Total Sources	\$16,244,483

The Dane County funding is anticipated to be used to purchase the land underlying the project as we understand the County requirements for this funding. Both Mirus Partners and Movin' Out are very experienced in structuring projects to account for the funding requirements for a wide range of types of financing and we expect we can create a structure which will meet the County's requirements.

TAB 4

Housing First

Housing First

Movin' Out, Inc. was created through a grass roots effort by families who have family members with a range of different types of disabilities, but who shared a common vision of wanting their family member to have control over where they lived. At the time Movin' Out was established, over 20 years ago, housing options for people with permanent disabilities was limited to either remaining in the family home, living in a group living arrangement of some type or in an institution. In any of these arrangements, the person with a disability had very little control over their living environment. The housing was controlled by those who provide the care and services that they needed to live. The vision of the founders of Movin' Out, Inc. was to change this arrangement by separating or "unbundling" housing and services so that the individual receiving services had a real choice of who provides the services as well as the ability to change that without changing where they live. Movin' Out has always marketed its supportive housing to a wide range of people with different types of disabilities. Some of these tenants have experienced homelessness. More recently, Movin' Out has expanded its marketing and outreach to also include military veterans who are in need of affordable housing and sometimes services. Many of these households have also experienced homelessness.

While Movin' Out does not directly supportive services, Movin' Out coordinates with service providers who are supporting our tenants. Movin' Out assists by coordinating tenants, their service providers, the contracted third-party property managers, the tenants' family members and other residents. In addition, Movin' Out is often called upon to assist in dealing with a wide range of issues that arise for the tenants in the supported housing units with a goal of having them be successful in maintaining their tenancy.

Movin' Out believes this approach applies to anyone who, for a variety of reasons, relies on supportive services and also needs access to very affordable housing. Having their services and housing bundled is often disempowering.

Another Movin' Out core value is providing housing options that integrate people with special needs of various types into the community. This is important for a number of reasons. First and foremost, the feedback that Movin' Out has received from the majority of people who need various types of supported housing is that they want to live in "regular" housing of their choice and with whom they choose. This is key as it offers the opportunity for these tenants to establish relationships and friendships with neighbors who may be in a position to provide "natural supports", meaning having relationships with those who are neither paid to have that relationship or who also have a "label" of some type themselves. Second, because it contributes to the feasibility of developing a project because the project is not 100% very low-income, does not require as much subsidy, is more acceptable to the neighborhoods in which it is located and is perceived as less risky by lenders and investors and therefore is easier to finance.

The housing Movin' Out develops does not require licensing or special zoning. As a result,

Movin' Out does not develop any multifamily project where more than 25% of the units are supported housing units.

Regarding "Housing First", Movin' Out, Inc. has always worked to provide housing as a part of the foundation for its tenants to provide the stability they need to be successful in coping with a range of other issues they may face (as do we all). Movin' Out has a highly successful track record of creating high quality stable and most importantly, very affordable housing options. Movin' Out markets them to very low-income tenants who also need supportive services. Movin' Out projects have very low turnover. The housing uses a standard residential lease and is not time restricted. The services Movin' Out tenants receive are individualized to meet their needs and may be either time limited or ongoing depending on the Individual's needs. Their tenancy is not contingent on their accepting services.

TAB 5

Targeted Population

Targeted Population

The Ace Apartments is being designed to provide affordable non-age restricted housing to a range of household sizes and income levels. Twenty- two percent of the 70 units (16 units) will be operated as supported housing. These units will be affordable to and reserved for very low income (30% county median income or below).

The Dane County Housing Authority will be providing eight project-based Section 8 rental assistance vouchers to the project. Access to these will greatly assist the lowest income households to secure new high-quality rental housing connected to supportive services. This offers these families a platform to stabilize their lives. Units supported with these vouchers will be marketed to families in conjunction with the provision of the supportive services made available in this project.

Through affirmative marketing coordinated by Movin' Out staff and the property manager the supported housing units will be marketed to income eligible households that either include a household member with a permanent disability and/or are a military veteran. Often some of these individuals have experienced homelessness. Movin' Out has established working relationships with a network of organizations and agencies who offer a wide range of supportive services to people with disabilities and veterans.

Marketing and outreach through this network includes working with the Wisconsin Family Care agencies, the Dane County Aging and Disability Center (ADRC), the Dane County Veterans Services Office and the U.S. Department of Veterans Affairs. Through these agencies and their contracted direct service providers we anticipate a high level of interest and continued occupancy of the supported housing units. The table below illustrates the levels of affordability offered in the project rents.

RESIDENTIAL RENTS		
Unit Type	# Units	Mo. Rent
1 bedroom (30%) – Sec. 8	3	\$773*
1 Bedroom (30%)	8	\$397
1 bedroom (60%)	1	\$875
1 bedroom (Market)	10	\$985
2 Bedroom (30%) - Sec. 8	5	\$923*
2 Bedroom (50%)	21	\$860
2 Bedroom (60%)	7	\$975
2 Bedroom (Market)	1	\$1,050
3 Bedroom (50%)	12	\$995
3 Bedroom (60%)	2	\$1,150
TOTAL	70	* Fair Market Rents

In addition to the supported housing units, the project offers high quality very affordable housing to the area's working families. There will be 11 market rate units with the remaining 59 units at rents affordable to households earning no more than 60% of county median income.

TAB 6

Supportive Services Plan

Supportive Services Plan

The Ace Apartment project will provide access to a wide range of supportive services that will be tailored to meet the individual needs of the households who live in the project. As described below Movin' Out has established an ongoing program and network of service providers it collaborates with.

It is important to recognize that the WHEDA tax credit program provides access to a valuable source of financing. It is distributed through a highly competitive process which requires developers to compete for an award by committing to plan and operate the project in specific ways in exchange for points awarded through the application process. One of the areas which WHEDA awards points for is called "integrated supported housing" under this category the developer commits to providing a specific number of units (but no more than 25% of the total units) which will be set aside as supported housing and will have very low rents (affordable to households with incomes < 30% of county median income). Movin' Out has worked closely with WHEDA to help shape Wisconsin's tax credit program to encourage this integrated supported housing model. The first project to include this approach called Elven Sted, located in Stoughton was developed and is owned and operated by Movin' Out. That project served as a model for establishing this preference by WHEDA for providing this approach to providing supported housing in Wisconsin.

WHEDA requires the developer demonstrate the required capacity by providing a plan to market these units to the intended population of low income households who either are military veterans or have permanent disabilities. They also require there to be a plan for these tenants to have access to the supportive services they need. The information below and related attachments in this section includes this information and provides insight regarding the experience of this team to plan, develop and operate a successful integrated supportive housing project.

o Characteristics of the specific target population(s)

The initial pool of tenants for at least 16 units of housing will be:

- Individuals and families referred to the project by the Dane County Homeless Services Consortium (HSC) through its housing placement system.
- People with developmental and other physical or behavioral disabilities who are eligible for long- term support services and who are referred by the Dane County Aging and Disability Resource Center; the family care agency contracted by the State of Wisconsin; affiliated care managers; and affiliated supportive service providers serving qualified recipients of long term care living in Dane County;
- Households that include one or more household members who are military veterans, are eligible for supportive services and who are referred by Dane County Veterans Services Office or affiliated veterans' supportive services providers serving qualified recipients of veterans' services in Dane County.

Additionally, this project will provide excellent opportunities for larger low-income families by providing 14 three-bedroom units many of which will have ground floor entries well suited to families with children. Twelve of these units will have rents targeted to families with incomes below 50% of area median income.

Final determination of who will be selected as initial tenants will be made by the professional property management company, with recommendations from Movin' Out and when appropriate their supportive services providers.

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

In planning this project, we worked with the long-term care and veterans service systems to confirm that there is need and demand for the proposed housing. This demand is further evidenced by both the City of Madison Biannual Housing Report and the Dane County Housing Needs Assessment report. Both of these indicate a severe shortage of affordable housing and in particular housing that is affordable and accessible to very low-income households with disabilities or who are homeless as well as military veterans among others. This type of housing is fully consistent with federal, state and local policies regarding the development of supported housing. It is highly integrated into the community, does not require acceptance of supportive services but is coordinated with these services systems. It will not be owned or operated by business interests who provide direct supportive services; this provides a separation between housing and services. This arrangement provides for more stable housing by allowing the tenants to have a choice of services and providers thus offering more control over their living environment. The housing will not require licensure. The supportive units are integrated among the remaining 54 units of workforce and market-rate housing offering true community integrated housing which is the strong preference of people who may rely on long term support and/or are military veterans.

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

The supported housing units' eligibility screening and assessment procedures used for this project will follow the same steps and use the same standards as the balance of the units in this project; however, in addition to that process, tenant eligibility status for supported housing units will also include a determination and verification that the household includes at least one member with a permanent disability and/or is an eligible military veteran. The initial eligibility information and assistance in self screening by interested parties will be provided by Movin' Out staff, in conjunction with the applicant's supportive services providers and/or guardian or family, as appropriate. Movin' Out will assist the prospective tenant by helping them to determine eligibility and in preparing them for formal application for tenancy then will refer them to the property management company for formal screening and eligibility determination. Movin' Out and ACC will affirmatively market the supported housing units.

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

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

If ACC receives a prospect who may qualify for one of the supportive housing units, they will refer them to Movin' Out for initial eligibility screening.

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

Movin' Out does not provide any type of personal care, residential case management, health care, or other typical direct service care provided by human or social services agencies. However, Movin' Out does provide assistance to tenants through a program called Tennant Success Services. These services include assistance and coordination with other direct service providers, the property manager, the tenants relying on supportive services and the other tenants in the project. This service is provided to all households that include a family member with a permanent disability and to eligible veteran households or who are referred to the project for housing by the Dane County Homeless Service Consortium. This counseling is designed to assist these households to evaluate their housing situation and establish a future housing plan. Often these plans need to account for not only typical housing issues such as household income and credit worthiness but also considers supportive service/ long term needs, transportation, employment, household composition, accessibility requirements and a number of other issues often faced by people with permanent disabilities and veteran families or have experience homelessness. These plans may lead to eventual home ownership, long-term tenancy in rental housing, or other stable, affordable, and integrated housing solution.

Additionally, Movin' Out provides assistance to tenants in the supported housing units by helping to solve issues the household, their family, caregivers and the property manager may encounter. The goal is to assist these households to be successful tenants. Below is an outline of services Movin' Out provides in supported rental housing it owns.

Movin' Out will provide services and amenities to meet the following needs of tenants who rely on supportive services:

- Tenants in need of supportive housing units need affordable housing: Movin' Out provides decent shelter at a rent affordable to tenants on a fixed income. The owner's non-profit status and financing structure for the project help assure affordability for qualified tenants on a continuing basis.
- Tenants in need of supportive housing need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable for as long as the tenant wants to live in the apartment, subject to compliance with lease terms.
- Tenants who need supportive housing often need veteran and disability- sensitive property management. Movin' Out will assist in the coordination of property management with the delivery of supportive services and assist in tailoring property management to tenants whose disabilities may require individualized accommodations. Property management will coordinate with, complement, and supplement the day to day in-home supportive services.
- Tenants in need of supportive housing often desire ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens. Movin' Out will develop housing units for one or two tenants per unit, built to accommodate the specific needs and preferences of the tenants. The housing will not be burdened with licensing required by congregate facilities, thus allowing the tenants to be seen and known as ordinary neighbors.

While Movin' Out does not provide other types of direct supportive services needed by many households living in supported housing units it does coordinate with service providers who do. The outline below describes the types of services which are provided and which Movin' Out may assist in identifying funding sources and service providers who can provide the needed supports.

The supportive service providers will offer services to meet the following needs of tenants who rely on supportive services:

- Tenants with disabilities or are low-income veterans need individualized in-home support services available on a regularly scheduled basis and on short notice, when needed. The supportive services providers offer needed support; available in tenants' homes, to maintain good nutrition, hygiene and health, manage budgets and bills, establish a domestic routine, establish a safe environment and safe practices, provide quick response to emergencies, help to maintain good relationships with housemates and neighbors, monitor and dispense medication, help in figuring out how to get to work and social destinations using public transportation, and coordination of domestic routines and schedules to insure people get to work, appointments, and other commitments on time and prepared.

- Tenants with disabilities and veterans need to feel a sense of belonging and membership. The supportive service providers offer assistance in initiating and maintaining constructive relationships with housemates, neighbors, resident association members, friends, co-workers, and family members.
- Tenants with disabilities or veterans may need support in exercising responsibility, making choices, and providing direction and decision-making in developing and implementing a service plan that reflects one's own needs and preferences. The supportive service providers offer to facilitate the tenants' engagement in decisions about their housing and will coordinate with tenants' guardians, care managers, Movin' Out, and ACC, the designated property management company.

The supportive services providers will meet the needs and preferences of tenants by providing day to day, in-home supportive services. The tenants designated for supportive services will have individualized support plans. Services are determined based on the needs and desires of each person and their support team. Individuals have the right to direct their own lives, including having a say in the selection of their service providers. For the purpose of this project, prospective residents will be provided the following supports:

- Staff support tenants in their homes to ensure safety and provide supervision as needed. Amounts of support range from 24 hours per day to come-in support a few hours each day or week.
- Autonomy and Choice: the supportive services providers chosen by tenants will ensure that individuals have choice about where and with whom they live, how personal time is used and what services are received.
- Relationships/Community Involvement: the supportive services provider will assist with opportunities to develop and maintain relationships with friends, family and community members. Individuals will have opportunities to participate in community life and will get help in coordinating plans, help with maintaining relationships with friends and neighbors, and coordination of transportation, as needed, to get to the right place at the right time.
- Organization/communication: the supportive services provider staff will work cooperatively with each individual to plan and organize their daily routine, including coordinating transportation, special events, communicating as needed with other service providers, support brokers and family members.
- Medication assistance and medical advocacy: Staff will assist each person, as needed, with medication administration, ensuring

accuracy and consistency of needed medications. Staff will work with the individuals and their teams to ensure medical appointments are attended, when necessary, and that any medical issues that arise are addressed promptly and appropriately. Staff will monitor the need for follow up appointments and maintain documentation of medical history.

- **Personal Care:** Staff will assist the individuals with personal care including bathing, hair care, tooth brushing, toileting, dressing, care of eyeglasses/hearing aids, assistance with mobility/ambulation, skin care, use of assistive devices and any other assistance necessary.
- **Home maintenance:** Staff will facilitate home maintenance including assuring all areas of the apartments are clean, organizing, laundry, and maintaining a safe home environment.
- **Meal Planning/Groceries:** The supportive services provider will assist with meal planning, nutrition education and grocery shopping for each individual. This may include planning weekly menus, making grocery store lists, providing transportation to the grocery store and assistance with purchasing groceries. Supportive services will also include education and/or guidance around special dietary and healthy eating.
- **Financial support:** The supportive services provider will arrange fiscal assistance to assure the person's funds are deposited and rent and other bills are timely paid. The residential supportive services provider will work cooperatively with each individual's representative payee to ensure they are maintaining benefit eligibility and to meet any other financial obligations.

Service Providers for People with Permanent Disabilities Served by Long-Term Care

The tenants in supported housing units set aside in this project will have access to a wide range of supportive services depending on their needs and eligibility. However, no services will be required to be taken as a condition of tenancy. For tenants who have permanent disabilities and need access to Long-Term Care services these will be funded by the Wisconsin Family Care Agencies and provided by their contracted service agencies. Each individual served by this system will have a service plan that identifies what services they will receive and the agency that provides those services. The housing budget does not pay for any of these services.

Movin' Out will market the supported housing units to people with permanent disabilities by coordinating with the Dane County Aging and Disability Resource

Center, the county agency responsible for assisting citizens in accessing benefits and referring people to resources in the community including affordable housing. Movin' Out will coordinate its marketing and outreach efforts with the property manager, ACC and will continue to assist these tenants with any issues that may arise that could affect their success in maintaining their tenancy.

Veteran-Specific Services

The Ace Apartments will also offer comprehensive supportive services to eligible military veteran households in a fashion similar to that described above. The marketing and outreach efforts for veterans will be coordinated with the Dane County Veterans

Service Office the County agency responsible for assisting veterans in accessing benefits and referring them to resources in the community including affordable housing.

The County Veterans Services Office assists Veterans who may need supportive services and are eligible for veteran specific services to identify where to obtain those services from a range of providers who are primarily funded by the U.S. Department of Veterans Affairs. Movin' Out has established a working relationship with this agency locally and will work with them and their contracted service providers and tenants who are veterans to address any issues that may arise that could affect their success in maintaining their tenancy.

Movin' Out will refer any potentially eligible tenants identified by the marketing and outreach efforts described above to the property manager who will be responsible for qualifying eligibility based on the tenant selection policy for the project. Therefore, the supported housing units will be leased to eligible tenants on a first-come first-served basis.

TAB 7

Tenant Screening Policies

Tenant Screening

The resident selection criteria are used by ACC Management Group, Inc. (ACC) and the sites managed by ACC to uniformly evaluate all potential residents and to help protect the safety, health, and welfare of all other Residents. All adult occupants must complete a separate application and comply with the following criteria. See the enclosed ACC Resident Selection Criteria form which represents the tenant screening policies that ACC Management Group will apply to The Ace Apartments project. The responses to the issues listed in the Tenant Screening Worksheet (Attachment E) are listed on the enclosed worksheet. In addition, a more detailed company tenant selection criteria is provided for further detail. The intent is to provide high quality affordable housing options to low-income families while following all applicable Fair Housing laws and providing a quality place to live.

Tenant Screening Worksheet

Check the criteria below that you can agree to include in your formal tenant screening process.

The property manager for the project will not deny an applicant based solely on:

1) A lack of housing history

2) A credit score of less than 550 provided the applicant has a cosigner or is enrolled in a credit repair program.

3) Information on a credit report that is or has been formally disputed, in repayment, or unrelated to a past housing or housing utility obligation.

4) The applicant owes money to a prior landlord for rent or damages or to a utility company provided the applicant has entered into a payment arrangement with the debtor and is current on the repayment arrangement.

5) The applicant has a criminal conviction other than for a violent criminal action or other activity that would threaten the health, safety or right to peaceful enjoyment of others.

Tenant Screening Worksheet

1. Lack of housing history.

- a. If an applicant has less than two years of rental history, three options are available:
 - i. Obtain a qualified co-signer
 - ii. Provide a security deposit of 1.5 times the monthly rent
 - iii. Have rent paid under contract by a sponsor or payee

2. A credit score of less than 550 provided the applicant has a cosigner or is enrolled in a credit repair program.

- a. This property will not use a credit score to approve or deny an application. The credit report is reviewed entirely, and an applicant is granted certain allowances and options. Please refer to items 15-20 on the attached Resident Selection Criteria. Important notes pertaining to this topic include:
 - i. Medical and student loans are not taken into consideration.
 - ii. If an applicant has collections of up to \$3000, the application is not denied.
 - iii. If an applicant has collections from \$3001 - \$6000, a co-signer or other approved method is available.

3. Information on a credit report that is or has been formally disputed, in repayment, or unrelated to a past housing or housing utility obligation.

- a. The only requirement pertaining to utilities is that the applicant can put the utilities in their name or in a sponsor or payee's name.
- b. Medical and student loan collections are not considered when reviewing an application / credit report.
- c. Non-medical and student loan collections are allowed up to \$3000 regardless of status (formally disputed, in repayment). Non-medical and student loan collections are allowed up to \$6000 with a co-signer or other approved method.

4. The applicant owes money to a prior landlord for rent or damages or to a utility company provided the applicant has entered into a payment arrangement with the debtor and is current on the repayment arrangement.

- a. Applicants are required to be current on all rental payments in the past three years prior to the application being approved. Rental payments more than three years old are not considered.
- b. Applicants are required to be current on all damages payments in the past five years prior to the application being approved. Damages payments more than five years old are not considered.

5. The applicant has a criminal conviction other than for a violent criminal action or other activity that would threaten the health, safety or right to peaceful enjoyment of others.

- a. Please reference items 21 – 26 on the Resident Selection Criteria. Important notes pertaining to this topic include:
 - i. Criminal activity resulting in a denied application include:
 - 1. Manufacturing or distributing a controlled substance
 - 2. Convictions for crimes showing a demonstrable risk to resident safety and/or property within the past five years
 - 3. Sex offenders
 - ii. Applicants may also provide mitigating information to be considered.



RESIDENT SELECTION CRITERIA

Section 42 Properties – Effective 11/01/2017

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

The Application Process

1. All rental applications must be in writing and must be completed in the rental office.
2. Falsification on an application is a basis for automatic denial.
3. Applications are processed based on the time and date the application is received.
4. All adult applicants must pay a non-refundable \$15.00 processing fee. The application will not be taken or processed prior to receipt of the processing fee from all adult applicants. All applicants must sign the "Application Processing Fee Agreement" form and pay the \$15 Processing Fee made payable to the community.
5. All adult applicants must provide a Government issued proof of ID, Social Security number, and a birth certificate for minors in the household under the age of 18.
6. All adult applicants must pass our resident selection criteria based on landlord references, credit report and criminal background check including State and Federal sex offender registries and household income. If any of the household members do not pass, then the entire household will be denied.
7. ACC Management Group, Inc. reserves the right to reject an application for any negative references according to ACC's resident selection criteria.
8. If any applicant is in the process of a court eviction or is contesting a court eviction, the application will be held in abeyance until the final court disposition.
9. If any applicant has an eviction in the last 3 years, application will automatically be denied. If any applicant has more than 1 eviction in the last 5 years, application will automatically be denied.
10. If any applicant owes a landlord for back rent on a previous apartment within the last 3 years, the application will be automatically denied unless proof is provided the account has been paid in full. A security deposit of 1.5 times the monthly rent will be required prior to move in. If in the last 5 years an applicant has owed or currently owes money for damages on a previous apartment, the application will automatically be denied.
11. If any applicant has 1 stipulated dismissal/court ordered payment plan within the last 5 years, applicant would need to show proof of all terms being met and a security deposit equal to 1.5 times the monthly rent would be required. If any applicant has more than 1 stipulated dismissal/court ordered payment plan in the last 5 years, application would automatically be denied.
12. A community manager will deny no applicant. All applications are reviewed by ACC Management Group, Inc. compliance department.
13. The security deposit must be paid in full before applicant is given keys to the apartment. – No exceptions.

Income

14. The applicant's household monthly gross income must be equal to or greater than two (2) times the monthly rent.

Credit Reports & Co-signer Requirements

15. If collection accounts are listed on your credit report, collections that are paid in full or otherwise closed will not be counted. Medical collections and student loans will not be counted. All other collections will be counted and used to determine selection.
16. If the total amount of collections for the entire household exceeds \$3,000, the applicants will be required to obtain one approved co-signer; or other approved method (*see below) for the household in lieu of a co-signer. If the total amount of collections for the entire household exceeds \$6,000 the application will be denied.
17. All applicants without a credit report are required to obtain one approved co-signer or other approved method (*see below) for the household in lieu of a co-signer.
18. All applicants must provide proof that any Resident paid utilities do not have outstanding balances that would prohibit them from transferring utilities into the Residents name.
19. All first-time renters or applicants without a two-year rental history are required to obtain one approved co-signer or other approved method (*see below) for the household in lieu of a co-signer.
20. All cosigners are required to meet the terms of the resident selection criteria with total collections under \$500 and pass the cosigner-scoring sheet. Only one co-signer is needed per household and will have liability for the entire household.

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

Criminal Report

21. If you have been convicted of manufacturing or distributing a controlled substance as defined in Section 102 of the Controlled Substances Act, your application will be denied.
22. If you have been convicted of any other crime that shows a demonstrable risk to resident safety and/or property, within the past 5 years, your application may be denied after consideration of the nature and severity of the crime and the amount of time that has passed since the criminal conduct occurred. Additional factors may also be considered on a case-by-case basis.
23. Arrest records, without subsequent conviction, will not be considered.
24. Along with your application you may provide any mitigating information or documentation that you would like to have considered regarding any prior conviction.
25. Registration on the state or federal Sex Offenders Registry will be a basis for denial of your application.
26. Criminal history and the Sex Offenders Registries will be checked annually in advance of lease renewal, and if any member of the household no longer meets the criteria in #21 through #25 above, that household member will be required to vacate the unit or household's lease will not be renewed.

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

27. All applicants applying for a Section 42 apartment must adhere to IRS Section 42 LIHTC income limits to be accepted. Note: We will only allow an employer to fill out an Employment Verification two (2) times. When filling out the Section 42 application, if you do not understand a question, please ask the community manager for assistance before answering the question.
28. Adherence to the Section 42 incomes limits does not guarantee that the available unit will be made available to the first household who qualifies. Under the Section 42 code, some sites have specific income limits at different percentages of County Median Income (CMI). The first household who qualifies for the unit with a lower CMI income limit will be offered said unit.
29. **The household must be income qualified on the day of move-in. If any circumstances change between the original application, prior to or after move-in, the applicant must notify the management office immediately as qualification to the Section 42 income limits may be affected. _____ (please initial)**

30. If the household is entirely comprised of full-time students, they must meet one of the student eligibility factors.

Occupancy Issues

31. Maximum occupancy limits are two persons per bedroom unless otherwise specified by local ordinance. For the purpose of occupancy limits, all household members will be counted.

32. For Section 42 income limit calculations, an unborn child or children are counted as household members.

33. Age restrictions will apply at senior properties. Verification of age is required per #5 listed above. Ask the community manager for details.

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

If you any concerns about these criteria, please contact:

ACC Management Group, Inc., Compliance Manager, 2375 State Road 44, Suite A, Oshkosh, WI 54904

Applicant Acknowledgement

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

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

TAB 8

Funding Leverage

Funding Leverage

The Ace Apartments project provides a significant level of funding leverage. Our request to the County is for a total of \$500,000 (\$7,042 per unit in development subsidy). This project leverages a total of \$10,116,563 in additional development funding as identified below.

The table below summarizes the sources of funding for the project. Under this financing plan the project will only require approximately 13% of its cost to be covered by must pay first mortgage financing. The result is the ability to provide much more affordable rents to the tenants while at the same time constructing high quality housing.

First Mortgage	\$4,239,356
City of Madison AHF & HOME Funds	\$2,170,000
Dane County AHF	\$500,000
FHLB-AHP	\$750,000
Deferred Fee	\$68,352
Tax Credit Equity	\$8,585,127
Total Sources	\$16,244,483

The project also has a high level of impact for the surrounding neighborhood by providing new, high quality and well managed housing that will be very affordable to a range of household incomes and family sizes. As described earlier the project is located in the City of Madison within the Cottage Grove Road Activity Center planning area and over the coming years is expected to see significant redevelopment providing strong economic opportunities. It is expected to provide excellent transportation linkages and has access to the full range of community services located nearby.

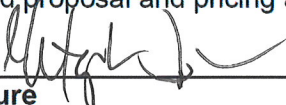
TAB 9

Required Forms

RFP COVER PAGE SIGNATURE AFFIDAVIT	
NAME OF FIRM:	Mirus Partners, Inc.
STREET ADDRESS:	7447 University Avenue, Suite 210
CITY, STATE, ZIP	Middleton, WI 53562
CONTACT PERSON:	Christopher Jaye
PHONE #:	(608) 824-2294
FAX #:	(608) 260-7832
EMAIL:	jaye@miruspartners.com

In signing this proposal, we also certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer, competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening of proposals to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned, submitting this proposal hereby agrees with all the terms, conditions, and specifications required by the County in this Request for Proposal, and declares that the attached proposal and pricing are in conformity therewith.



Signature

Christopher Jaye

Name (type or print)

President

Title

6/5/18

Date

Addendums -This firm hereby acknowledges receipt / review of the following addendum(s) (If any)
 Addendum # _____ Addendum # _____ Addendum # _____ Addendum # _____

VENDOR REGISTRATION CERTIFICATION

Per Dane County Ordinance, Section 62.15, "Any person desiring to bid on any county contract must register with the purchasing manager and pay an annual registration fee of \$20."

Your completed Vendor Registration Form and Registration Fee must be received for your bid to be considered for an award. Your bid/response may not be evaluated for failure to comply with this provision.

Complete a registration form online by visiting our web site at www.danepurchasing.com. You will be prompted to create a username and a password and you will receive a confirmation message, then log back in and complete the registration. Once your registration is complete you will receive a second confirmation. Retain your user name and password for ease of re-registration in future years.

Payment may be made via credit card on-line or by check in the mail or in person at the Purchasing Division office. If paying by check make check payable to Dane County Treasurer and indicate your federal identification number (FIN) on the subject line.

CERTIFICATION

The undersigned, for and on behalf of the **PROPOSER, BIDDER OR APPLICANT** named herein, certifies as follows:

- This firm is a paid, registered vendor with Dane County in accordance with the bid terms and conditions.

Vendor Number # To be assigned
by Dane County

Date Signed: 6/5/18

Paid until 6/5/19



Christopher Jaye
Officer or Authorized Agent

Mirus Partners, Inc.
Business Name

REFERENCE DATA SHEET	
Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for three (3) or more installations/services with requirements similar to those included in this solicitation document	
NAME OF FIRM:	SVA
STREET ADDRESS:	1221 John Q Hammons Drive
CITY, STATE, ZIP	Madison, WI 53737
CONTACT PERSON:	Mike Kendhammer EMAIL: kendhammerm@sva.com
PHONE #:	(608) 826-2404 FAX #:
Product(s) and/or Service(s) Used:	Accounting Services
NAME OF FIRM:	Foley and Lardner
STREET ADDRESS:	150 E. Gilman Street
CITY, STATE, ZIP	Madison, WI 53703
CONTACT PERSON:	Katie Rist EMAIL: krist@foley.com
PHONE #:	(608) 258-4317 FAX #:
Product(s) and/or Service(s) Used:	Legal Services
NAME OF FIRM:	Enterprise Community Partners
STREET ADDRESS:	251 Valley Ridge Drive
CITY, STATE, ZIP	Sun Prairie, WI 53590
CONTACT PERSON:	Russ Kaney EMAIL: rkaney@enterprisecommunity.com
PHONE #:	(608) 225-1556 FAX #:
Product(s) and/or Service(s) Used:	Funding Source and Technical Assistance Provider

Designation of Confidential and Proprietary Information

The attached material submitted in response to this Response includes proprietary and confidential information which qualifies as a trade secret, as provided in Sect 19.36(5), Wisconsin State Statutes, or is otherwise material that can be kept confidential under the Wisconsin Open Records law. As such, we ask that certain pages, as indicated below, of this response be treated as confidential material and not be released without our written approval. Attach additional sheets if needed.

Section	Page Number	Topic

Check mark : This firm is not designating any information as proprietary and confidential which qualifies as trade secret.


Prices always become public information when responses are opened, and therefore cannot be designated as confidential.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in Sect. 134(80)(1)(c) Wis. State Statutes, as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method technique or process to which all of the following apply:

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

In the event the Designation of Confidentiality of this information is challenged, the undersigned hereby agrees to provide legal counsel or other necessary assistance to defend the Designation of Confidentiality.

Failure to include this form in the response may mean that all information provided as part of the response will be open to examination or copying. The County considers other markings of confidential in the response document to be insufficient. The undersigned agree to hold the County harmless for any damages arising out of the release of any material unless they are specifically identified above.



Signature
RFP NO. 118054

President of Mirus Partners, Inc.
Title

Christopher Jaye
Name (type or print)

6/5/18
Date

Tenant Screening Worksheet

Check the criteria below that you can agree to include in your formal tenant screening process.

The property manager for the project will not deny an applicant based solely on:

1) A lack of housing history

2) A credit score of less than 550 provided the applicant has a cosigner or is enrolled in a credit repair program.

3) Information on a credit report that is or has been formally disputed, in repayment, or unrelated to a past housing or housing utility obligation.

4) The applicant owes money to a prior landlord for rent or damages or to a utility company provided the applicant has entered into a payment arrangement with the debtor and is current on the repayment arrangement.

5) The applicant has a criminal conviction other than for a violent criminal action or other activity that would threaten the health, safety or right to peaceful enjoyment of others.