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INTRODUCTION

PROPOSED DEVELOPMENT

Glen Grove is a proposed new construction development to be located in Cottage Grove, Wisconsin. The project will include 100 units in a three-story building all targeted to a mix of incomes ranging from 30-80% of County Median Income. A mix of 1-, 2-, and 3-bedroom units will be the first supply of non-senior affordable housing in Cottage Grove and will help provide affordable housing opportunities for the many families that work nearby. The project will be located at 505 W. Cottage Grove Road (please note, the address being used is approximate as it has not yet been assigned by the Village). Within just a half mile of the site you will find a grocery store, restaurants, highly regarded schools, parks, and child care centers.

Glen Grove will include a variety of amenities for residents including: community center, playground, community gardens, fitness center, business center, and free on-site parking. The large, 4-acre site allows for lots of room for residents and children to explore and play.

20% of the units will be set aside for households where at least one family member has a permanent disability. This fits with Movin' Out's mission of providing integrated, affordable housing solutions for individuals with disabilities. Movin' Out will work with local organizations to provide empowerment services to all residents along with resident service coordination to ensure residents have access to other services as needed.

Glen Grove will be financed utilizing WHEDA's 4% non-competitive tax credits along with other soft funding sources available in Dane County. Utilizing the non-competitive tax credit allows this project to proceed more quickly to help address Cottage Grove's need for affordable housing. Glen Grove anticipates closing and starting construction in the 2nd quarter of 2020.

PROJECT TEAM

Glen Grove will be developed and owned by Movin' Out, Inc., a statewide nonprofit. The project will be owned by an LLC that Movin' Out will serve as the sole Managing Member for. It should also be noted that, as a non-profit, Movin' Out is committed to maintaining the long term affordability of this development in keeping with its mission. More information about the team's experience can be found in the Development and Service Team Background tab.

Below is an overview of team members.

Developer/Owner: Movin' Out, Inc.

Architect: JLA Architects

General Contractor: McGann Construction



INTRODUCTION

EVALUATION CRITERIA

Glen Grove is consistent with all of goals noted in the RFP as noted below. Additional information on each area can be found in the other tabs of this response.

Development Team Capabilities: Movin' Out provides a wealth of experience and has developed 17 affordable housing projects over the last decade. We also understand the importance of selecting quality partners and believe this team is able to meet and exceed expectations.

Project Description: Glen Grove is a development that will be located on Cottage Grove Road in Cottage Grove. The project has already applied for WHEDA tax credits and the only remaining competitive process to complete is for the Dane County funding addressed in this RFP response. Glen Grove is a unique opportunity to provide affordable housing in a Dane County community that has not yet seen new LIHTC housing built and provides great choice for workforce housing Dane County residents. The project is located in an area rich in amenities including excellent transportation, services, education, recreation, and employment.

Location: The development is located at 505 W. Cottage Grove Road in Cottage Grove. This location is outside of the City of Madison.

Solar Array: The project is committed to incorporating a Solar PV system. The team has already met with GS Solar to begin the design process and better understand the solar capacity of the building. Solar-ready specs are already included in the initial design.

Funding Leverage: The requested award of \$1,500,000 (less the \$50,000 allocated to Solar PV) would allocate \$15,000 per affordable unit and approximately \$6,500 per affordable bedroom.

Tenant Selection: The development and property management teams for Glen Grove are committed to agreeing to the County provided tenant selection criteria and procedures. We will work to establish a tenant selection plan that ensures applicants are not denied solely based on the provided criteria.

Tenancy Addendum: The development and property management teams for Glen Grove are committed to established fair tenancy provisions with the lease or addendum to lease. We will work to ensure rules are applied in a fair and equitable manner.

Housing First: Movin' Out has established an agreement with The Road Home to provide a preference for up to five two- and three-bedroom units that allows for referrals from the Coordinated Entry System of the Dane County Homeless Services Consortium. The Road Home will provide referrals for available units as well as services and service coordination to these formerly homeless residents.

Supportive Services Plan: The attached supportive services plan has been thoughtfully and carefully developed in partnerships with area service providers. The plan includes Memorandums of Understanding with multiple organizations to ensure that all residents, regardless of ability, have access to services to ensure long-term success. In addition, Movin' Out has committed to providing its Community Impact program to Glen Grove to further ensure residents are surrounded with service coordination and housing success advocacy.



DEVELOPMENT & SERVICE TEAM BACKGROUND

Glen Grove will be solely developed and owned by Movin' Out, Inc., a statewide nonprofit. The project will be owned by an LLC and Movin' Out will serve as the sole Managing Member and Owner.

Movin' Out has assembled a highly qualified development team to plan, develop, construct, and manage Glen Grove. With Movin' Out as developer we will also be working with JLA Architects, McGann Construction, and ACC Management.

OBTAINING AND UTILIZING SECTION 42 TAX CREDITS

Movin' Out has a wealth of experience in developing Section 42 affordable housing. We have developed twelve LIHTC properties. Glen Grove already received its commitment of 4% tax credits from WHEDA and is on track to start construction in early 2020.

PARTICIPATING IN PUBLIC/PRIVATE JOINT VENTURES

Movin' Out focuses on developing affordable housing with many different partners, including public entities. We have worked with Dane County on multiple LIHTC developments in the last 5 years such as: The Royal, Pinney Lane Apartments, and Maple Grove Apartments. At Movin' Out we find that our mission of providing affordable housing to individuals with a disability is a common need for many cities and towns allowing us to develop a working relationship with the communities to work together in meeting that demand for housing.

Below you will find more information about Movin' Out our experience in developing multi-family housing for low-income households. Also, attached in this section is information about the experience of our architect, general contractor, and property management firm.

MOVIN' OUT EXPERIENCE OVERVIEW

Movin' Out, Inc. is a nearly 25-year old 501(c)3 non-profit organization, overseen by a board of directors, and serving individuals with disabilities and families with a member with a disability, as well as veterans, across the state of Wisconsin. Movin' Out provides a range of safe, community-integrated, affordable housing solutions, from HUD-certified housing counseling and assistance with down-payment and rehab, to a variety of rental housing options.

We work in close partnership with human service agencies 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. We work with property management organizations to ensure high quality ongoing management and maintenance. Movin' Out provides Tenant Success Services to residents who live in supportive units to address the gap between property management and supportive services provided by others.

Movin' Out, Inc. has assisted over 1,600 low-income households to purchase homes. Additionally, during the past 13 years, Movin' Out, Inc. has developed and owns and operates over 1,000 units of affordable rental units in five Wisconsin counties. We have participated in the entire development process, from planning and securing capital subsidies to coordinating with partners through design and construction and then managing the process through lease-up and long term operations.



DEVELOPMENT & SERVICE TEAM BACKGROUND

STAFF QUALIFICATIONS

The Movin' Out Rental Development Team consists of senior level experts in managing complex housing and disability programs. They have significant professional experience and competencies in all the necessary areas to successfully develop and operate the proposed housing. Movin' Out, Inc.'s key development staff include Dave Porterfield and Megan Schuetz.

Dave Porterfield, Director of Real Estate Development, has nearly 30 years of affordable housing development experience. He has been involved with Movin' Out since its inception, providing a range of consulting and advisory services to the organization. Dave joined the staff nearly 12 years ago to lead Movin' Out's development projects. He has extensive experience with a wide range of financing programs including, but not limited to, HUD Section 811 and Section 42 Tax Credits.

Megan Schuetz, Real Estate Developer, joined Movin' Out in the summer of 2018, bringing over 12 years of real estate development experience from a for-profit developer in Wisconsin. She has worked on over 40 developments totaling more than \$400M. Megan is experienced in working on affordable housing in Wisconsin and specifically in Madison and Dane County.

In addition to the Rental Development Team, Movin' Out employs staff with deep experience in leadership, community engagement, program development and compliance, asset management, and housing counseling.

Kathryne Auerback, Executive Director, joined the organization in Spring 2018. She brings over 25 years of experience leading change for healthier and more equitable organizations and communities. She has managed numerous green building and other environmental and health-related enterprises. Her experience includes designing and leading a broad range of innovative community and economic development initiatives. Auerback earned her MA and MBA degrees from UW-Madison.

As the Asset Manager, **Mary Myers** has a key role in preserving and increasing the quality and sustainability of the properties Movin' Out reserves for low-income tenants with disabilities. She tracks the financial and operational performance of Movin' Out's housing portfolio, communicates with property management firms, and composes required reports to public and private agencies. As asset manager, Mary is also responsible for knowing and interacting with tenants, their supportive service teams, and guardians or family members. She has extensive training in numerous aspects of asset and property management.

Amy Kallas, Associate Director, began her work at Movin' Out as a Housing Counselor and later moved into the role of Program Compliance Manager, managing operations, grant writing, and reporting. She was promoted to Associate Director in 2017. Amy holds a degree in Psychology from the UW-Stevens Point. Prior to joining Movin' Out Amy worked at various human services agencies in direct services, support coordination, and management.



DEVELOPMENT & SERVICE TEAM BACKGROUND

Sara Hurley has been a HUD-certified Housing Counselor with Movin' Out since 2014. She has over 20 years of case management experience working with adults with development/intellectual and physical disabilities.

Paula Tiffany has been employed as a HUD-certified Housing Counselor at Movin' Out, Inc. since 2001. Prior to working at Movin' Out, Paula worked for 10 years with children with developmental disabilities and mental health issues. She also provided case management services to people with disabilities. Paula is a graduate of UW-Madison.

Rebecca Wiese has been a HUD-certified Housing Counselor with Movin' Out for over 10 years. She previously worked for many years helping people with developmental disabilities to find jobs. Rebecca earned her degree in Social Work from UW-Oshkosh.

EXPERIENCE WITH SUPPORTIVE HOUSING & SUPPORT SERVICES

Movin' Out was founded under the premise of providing integrated housing opportunities for individuals with disabilities. For over twenty years Movin' Out has focused its mission on establishing relationships and advocating for these individuals to ensure they have access to housing options. Specifically, in the last decade we have focused on developing multi-family housing with no more than 25% of the total units targeted to households where one member has a disability.

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. Movin' Out has worked closely with WHEDA to help shape Wisconsin's tax credit program to encourage this integrated supported housing model through the Integrated Supportive Housing points. The first project to include this approach is called Elven Sted which is located in Stoughton and was developed, owned, and operated by Movin' Out. That project served as a model for establishing this preference by WHEDA for this approach to providing supported housing in Wisconsin.

Other funding sources have started to recognize the substantial need for integrated supportive housing. Movin' Out has a wealth of experience in this area and brings real world, people-focused ideas and implementation approaches to every project it works on. To date, Movin' Out has developed over 250 units of integrated housing in almost 20 projects throughout Wisconsin.



DEVELOPMENT & SERVICE TEAM BACKGROUND

PROPERTY MANAGEMENT

Movin' Out is partnering with ACC Management on Glen Grove. ACC 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. Movin' Out has previous experience with ACC who has a well-established business in Wisconsin managing high-quality affordable housing projects.

ACC Management Group, Inc. is a full-service property management firm dedicated to providing professional results-oriented services to its clients. ACC currently operates over 70 properties and 4,000 apartments throughout Wisconsin, Illinois, and Iowa. ACC's exceptional team of multi-family leaders has a proven track record of excellence in management of affordable housing with various state and federal programs including, Section 42 Tax Credit, Section 8, and Section 515.

ACC Management Group has established a long history of extraordinary program compliance proven by superior ratings with state and federal agencies, such as WHEDA, IHDA, and HUD. This includes management of properties with and without supportive services. Many properties within their portfolio include apartments that are specifically set aside for veterans, persons with physical or mental disabilities, age restrictions, and other designations. They often work hand-in-hand with an organization, such as Movin' Out, to place qualifying residents in these apartments. Additionally, many properties partner with a local organization to offer empowerment services such as courses on financial literacy and income tax preparation.

In addition to their extensive experience, ACC 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 for 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 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.

Movin' Out has experience working with ACC on multiple affordable housing properties throughout Wisconsin including the Elven Sted Apartments. Elven Sted is a 33-unit property with an outstanding occupancy history and similar characteristics to Glen Grove including the use of Low Income Housing Tax Credits (LIHTC) as a funding source.



MOVIN' OUT DEVELOPMENT EXPERIENCE

Pinney Lane Apartments

902-914 Royster Oaks Dr., Madison, WI 53714



Pinney Lane Apartments is a newly constructed, 70-unit, three-story, multifamily rental housing development located near the intersection of Cottage Grove and Dempsey Roads on Madison's East side. The project opened in 2015. Pinney Lane meets an increasing need for affordable housing that integrates housing options for people with disabilities within the community. The housing is a mixed-income project with 59 units reserved for household with incomes below 60% of median of the Dane County Area Median Income. The remaining eleven units being rented to households with incomes below 80% AMI. Through affirmative fair housing marketing efforts Movin' Out targets 18 units to individuals with disabilities. The project was financed with WHEDA 9% tax credit equity, City of Madison Housing Trust Fund, City of Madison HOME funding and Federal Home Loan Bank of Chicago Affordable Housing Program funds as well as 8 project based Section 8 vouchers provided by the City of Madison CDA. It is part of a larger mixed-use redevelopment plan for the 28+ acre Royster Clark site that also includes the new City of Madison Public Library branch. This project was a joint venture between Movin' Out, Inc. and Stone House Development.

MOVIN' OUT DEVELOPMENT EXPERIENCE

Elven Sted Apartments 831 Eighth Street Stoughton, WI



Elven Sted (River Place in Norwegian) is a 33-unit affordable rental project of new construction in a redevelopment area in Stoughton WI. Thirty-two of the units are tax credit set-aside units and one 3-bedroom unit is market rate. It is multi-family, mixed income community with units at 50%, 60%, and 80% CMI. The mix of 4 one-bedroom, 17 two-bedroom, and 12 three-bedroom units provide much needed affordable, accessible workforce housing as identified by local officials and community groups in Stoughton. Elven Sted serves both households that include people with disabilities and low-income workers, some of whom provide direct support/ residential services for disabled residents in Stoughton. These households benefit from having more affordable housing and living in close proximity to those they support. The site fronts on the Yahara River and is located in the central area of the City of Stoughton on a site at the south end of 8th Street. The site is approximately 2.5 acres in total. The site is located within the boundaries of a redevelopment area called the Rail Corridor Tax Increment District #5. Financing for Elven Sted included tax credit financing combined with Dane County HOME funds, state brownfield funding, and local TIF, combined with long term debt financing.



MOVIN' OUT DEVELOPMENT EXPERIENCE

The Royal

2232 W. Broadway, Madison, WI 53713



Description: The Royal apartment project is a joint venture developed by Movin' Out and Mirus Partners. The project will open in November of 2018. The 48-unit mixed-use, multifamily project includes underground and surface parking and approximately 3,000 square feet of ground floor commercial space, a community room, and leasing office. There is also open green space and playground area. The project is comprised of 4 one-bedroom apartment units, 32 two-bedroom apartment units and 12 three-bedroom apartment units designed for family occupancy. The building is constructed to meet Wisconsin Green-Built Home standards. Through affirmative fair housing marketing efforts Movin' Out targets 12 units to individuals with disabilities. The project was financed with WHEDA 9% tax credit equity, City of Madison Housing Trust Fund, City of Madison HOME funding, Dane County Affordable Housing Funds, and Federal Home Loan Bank of Chicago Affordable Housing Program funds.



MOVIN' OUT DEVELOPMENT EXPERIENCE

OVERVIEW OF ALL PROJECTS DEVELOPED

The Ruxton – Platteville, WI

71 units of mixed-income Section 42 apartments in a mixed-use property in Platteville completed in partnership with General Capital. The project includes 15 units of integrated supportive housing.

Pioneer Ridge Apartments - Wisconsin Dells, WI

18 units of integrated supported housing integrated into a 72-unit mixed-income Section 42 financed project located in the Northeast section of Wisconsin Dells. This project is a joint venture with Mirus Partners.

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, Wisconsin. Movin' Out partnered with CBH, LLC, a partnership of local business people from Waunakee, to plan and develop this innovative project.

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 did 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. Movin' Out completed this project in partnership with Jewish Family Services and General Capital Group.

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

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 in which Movin' Out partnered with MSP Inc. The project is financed with a combination of Section 42 tax credits and federal HOME funding.

Maple Grove Commons - Madison, WI

20 units of supported housing integrated into a 78 unit mixed-income Section 42 financed project located on McKee Road in Southwest Madison as a joint venture with Oakbrook Corporation.



MOVIN' OUT DEVELOPMENT EXPERIENCE

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 and located in downtown Waterloo, WI, in Jefferson County.

New Berlin City Center - New Berlin, WI

102-unit affordable rental housing project for families with 11 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.

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.



JLA

ARCHITECTS

ABOUT JLA

JLA Architects is a full-service architectural and planning firm with offices in Madison and Milwaukee. Joseph Lee founded the firm in 2007 to create a “client service” based firm that offers a comprehensive range of professional services allowing us to assist you at every phase of the real estate development process.

FIRM COMPOSITION

25	Total Staff Members
6	Licensed Architects
16	Architectural Associates
1	Marketing
1	Admin/HR
1	IT Tech

OUR EXPERIENCE

Our projects have ranged in size from smaller commercial remodels to large & complex multi-use facilities. We provide each client and project with the same level of excellent service & care that is often lacking in the architectural industry today.

Although our expertise is diverse, we focus on these project types:

- Multi-Family
- - Market-Rate & Affordable
- Mixed-Use
- Corporate
- Recreational
- Housing with Services
- Civic & Institutional
- Retail/Restaurants
- Adaptive Re-use
- Industrial

We invite you to visit jla-ap.com to view our portfolio.



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AREAS OF **EXPERTISE**

As a full-service architectural and planning firm, we offer the following services to our clients:

project feasibility

Site Selection and Site Analysis
Programming and Pro Forma Assistance

planning services

Land Use Space Allocation
Building Footprints
Parking Requirements
Service Needs

architectural services

Architectural Programming
Architectural Design
Interior Design
Construction Documents
Construction Administration
Post-Occupancy Evaluations

entitlement assistance

Community Meetings
Municipal Meetings
Municipal Submittals
Owner's Representative Services

THE JLA **PROMISE**

***A commitment to your vision, your budget,
and your organization's legacy.***

We promise that WE WILL:

- LISTEN TO YOUR NEEDS and go the extra mile to provide you a design that's feasible, within budget, and one you can be proud of.
- BE YOUR PARTNER FROM BEGINNING TO END, from determining the feasibility of your project to construction administration. A relationship built on collaboration ensures a successful project.
- PROVIDE MARKET KNOWLEDGE AND SOUND PROFESSIONAL ADVICE so you are educated on current design and construction trends as well as applicable municipal approval processes and building codes.
- LEVERAGE THE LATEST TECHNOLOGY to ensure an efficient approach. This allows you to make more informed decisions earlier in the process to help avoid costly changes down the road.
- OFFER COMPETITIVE AND CLEAR FEE STRUCTURES because in our minds it's bad business to 'nickel and dime' clients.



JOSEPH LEE

FOUNDER & PRESIDENT

JLee@JLA-AP.com

C: 608.215.1495

EDUCATION

Masters of Architecture
UW-Milwaukee, May 1998

Masters of Urban Planning
UW-Milwaukee, May 1998

Bachelor of Science
Architectural Studies
UW-Milwaukee, May 1995

Project Manager Bootcamp
PSMJ, 2006

Strategies for the Construction
Administrator
UW-Extension Course, 2005

PROFESSIONAL AFFILIATIONS

Licensed Architect
Wisconsin, 2003–present

American Institute
of Architects, 2003–present

AWARDS & RECOGNITION

Franciscan Health Care Center
Finalist: New Construction

Nursing Homes Long Term Care
Management, 2003

Madison's "40 Under 40"
In Business Magazine, 2006

"Design of the Times"
Madison Magazine, Feb. 2007

Joe is a Madison native and graduated with both a Masters of Architecture and a Masters of Urban Planning from the University of Wisconsin–Milwaukee (UWM). During his schooling and after graduation, Joe resided in Milwaukee for 13 years, working in both the public and private sectors.

Prior to founding JLA Architects & Planners in February 2007, Joe was an associate at Eppstein Uhen Architects in Milwaukee where he was a lead designer on multi-family, mixed-use, & retail projects.

Joe's background in both architecture and urban planning has allowed him to develop a unique blend of skills & market knowledge that brings distinct value to JLA clients.

As the Owner and Managing Principal of JLA Architects, his main goal is client satisfaction. He is involved at every phase of the process and truly believes that listening and collaborating with clients at every step ensures a successful project.

RELATED PROJECT EXPERIENCE

Forte at 84 South	Greenfield, Wis.
50Twenty Apartments	Madison, Wis.
Velo Village at Ballpark Commons	Franklin, Wis.
Vim & Vigor at the Brewery	Milwaukee
1600Tosa apartments	Wauwatosa, Wis.
Veritas Village apartments	Madison, Wis.
Yahara Commons (mixed-use development)	Monona, Wis.
Middleton Station apartments	Middleton, Wis.
Meadow Ridge (affordable housing)	Middleton, Wis.
The Globe Apartments (affordable housing)	Watertown, Wis.
Stonebridge Apartments (affordable housing)	Merrill, Wis.
Cedar Glen Senior Living	Wauwatosa, Wis.
Factory District Apartments	Madison, Wis.
The Junction Apartments	Menomonee Falls, Wis.
Valley Endodontics	Appleton, Wis.
Home Again Assisted Living	Cambridge, Wis.
Brooks & Dayton Student Housing	Madison, Wis.
22 Slate Apartments	Madison, Wis.
Holy Mother of Consolation Parish Hall	Oregon, Wis.

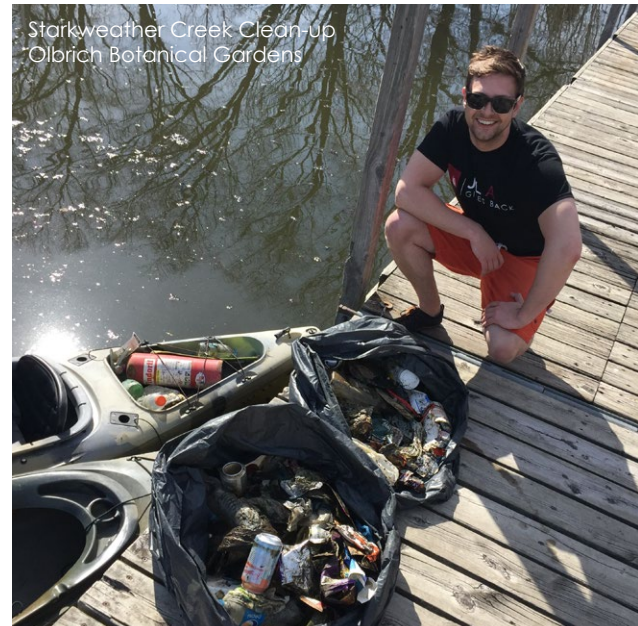
GIVING BACK

Through our corporate citizenship program, JLA Gives Back, our team works hard every day to make a positive impact in our communities. Several times a year, we volunteer together at a new non-profit organization. Each team member is also allotted paid time every year to volunteer with organizations they are most passionate about. Many team members spend their nights and weekends volunteering as well, so JLA is proud to match their efforts with monetary donations. We are deeply committed to bettering our communities and aren't afraid to roll up our sleeves.

To learn more, follow #JLAgivesback on Facebook and LinkedIn



River Food Pantry



Starkweather Creek Clean-up
Olbrich Botanical Gardens



Mobile Food Pantry at Bradley Crossing
JFS Housing & Feeding America



Construction 2018
Middleton Outreach Ministries



Mobile Food Pantry at Bradley Crossing
JFS Housing & Feeding America

CLIENT REFERENCES

We are proud of our past successes & relationships that we have built with our clients. We encourage you to contact any of the references below to discuss their experiences with JLA.

Mr. Chris Laurent

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"JLA is easy to work with because **they take the time to listen to the needs of their clients.** They do everything humanly possible to meet schedules and be on budget with the project."

William Arpe
CEO, Fiduciary Real Estate Development Inc.



ABOUT MCGANN CONSTRUCTION, INC.

McGann Construction, Inc. is a Subchapter S Wisconsin Corporation established in January of 1988. The building contractor registration number with the State of Wisconsin is #2837. The officers of the corporation are Aaron Kostichka, President; Bryan McGann, Executive Vice President; and Patrick Holzem, CPA, Treasurer/Secretary. All officers are authorized to negotiate contracts in the name of the Corporation. The Principals of the company are Bryan McGann and Aaron Kostichka.

Under normal economic circumstances, they have a steady workforce of approximately 80 employees which they self-perform demolition, rough and finished carpentry, concrete foundations and flatwork, steel erection and exterior siding.

Since 1988, they have been a full-service General Contractor, currently averaging over \$58 million annually in the Wisconsin construction market. They specialize in Multi-Family Residential Housing. In over 30 years of work, they have constructed projects in many communities throughout Wisconsin.

As one of the few Accredited Quality Contractors certified in Wisconsin, McGann Construction has earned a strong reputation based on service, delivering top quality buildings in a timely fashion, and for bringing extraordinary value to owners.

McGann Construction has a highly qualified and dedicated team of professionals in the field and in the office. McGann Construction continues to be a sought-after contractor because of its experienced leadership and excellent communication with its clients.



Revival Ridge - Madison



McGann Construction Relevant Experience

NEW CONSTRUCTION LIHTC WHEDA PROJECTS

PROJECT	UNITS	LOCATION (WI)
Riverplace Senior Housing	49	Janesville
Sussex Mill Apartments	67	Sussex
Rosewood Apartments	48	Stoughton
The Landings	64	Waupan
Timber Trails	64	Wisconsin Dells
Maple Ridge Senior Housing	49	Reedsburg
Sheboygan Senior Housing	63	Sheboygan
Cudahy Senior Housing	49	Cudahy
Sherman Glen Apartments	100	Madison
Lincoln Court Apartments	25	Mt. Horeb
Greenfield Senior Housing	121	Greenfield
Oregon Senior Housing	25	Lodi
Pleasant Valley	24	Lodi
Riverbend Senior Housing	40	West Bend
Sugarwood Apartments (Belleville SH)	25	Belleville
Parkside	100	Glendale
Chester Square Apartments	48	Madison
Chapel Valley Housing II	60	Madison
Coachyard Square	23	Madison
Sunwood Apartments	48	Sun Prairie
University Heights Apartments	32	Sheboygan Falls
Rosewood Apartments II	48	Stoughton
Highlands South Apartments	62	Waukesha
Yahara Riverview	60	Madison
Park Glen Commons	110	Madison
Revival Ridge (Allied Drive)	49	Madison
Red Cliff Phase 2	24	Bayfield
Truax Phase 2	48	Madison
Maple Grove Apartments	80	Madison
Meadow Ridge Apartments	95	Middleton
Rethke Terrace (MSH 1)	60	Madison
8 Twenty Park Street	95	Madison
Madison Supportive Housing 2	45	Madison
Oak Ridge Apartments	95	Middleton
Sub-Total	1995	TOTAL

WHEDA LIHTC ACQUISITION/REHABILITATION PROJECTS

PROJECT	UNITS	LOCATION (WI)
Marathon County Housing	176	Marathon County-Scattered Sites
LaFollette Park Apartments	56	West Allis
Sturgeon Bluff Apartments	105	Wausau
Central Manor (Arcadia Housing)	30	Arcadia
Marian Manor	121	Oshkosh
Parkview Apartments	24	Brillion
Brookside Apartments (Whitehaul Apts?)	57	Whitehaul
Heritage Apartments	23	Brillion
Foxview Manor/Riverside	61	Omro/Winnconne
Truax Park Apartments (Phase 1)	71	Madison
Beloit Apartments (Phase 2)	66	Beloit-Scattered Sites
Oak Grove Apartments	24	Horicon
Tower Redevelopment (Phase 1)	53	Oshkosh
Tower Redevelopment (Phase 2)	51	Oshkosh
Cumberland Court	76	Oshkosh
Waite Rug Redevelopment	56	Oshkosh
Randall Court Redevelopment	120	Appleton
Sub-Total	1170	TOTAL

Total LIHTC Completed Units **3165**

Company Overview



**ACC Management Group, Inc.
2375 State Road 44, Suite A
Oshkosh, WI 54904
(920) 966-9905**



ACC Management Group, Inc. is a full-service property management firm dedicated to providing professional results-oriented services to its clients. ACC currently operates over 70 properties and 4000 apartments throughout Wisconsin's major markets and Illinois. Headquartered in Oshkosh, WI, ACC's exceptional team of multi-family leaders has a proven track record of excellence in management of affordable housing with various state and federal programs including, Section 42 Tax Credit, Section 8, and Section 515.

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

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

ACC Management Group has established a long history of extraordinary program compliance proven by superior ratings with state and federal agencies, such as WHEDA, IHDA, and HUD. ACC's experienced team of compliance professionals assist you through the initial stages of your development and the entire regulatory period for your property.

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

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

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



ACC Corporate Team

Chris Hand, CPM

President / Owner

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

Rose M. Andler, HCCP, COS, STAR

Vice President

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

Dewayne Pohl, Broker, TCS

Facilities Director / Broker

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

Mary Wangerin, HCCP, COS

Director of Operations

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

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

Heather Hand, HCCP, TCS

Director of Property Management / Principal

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

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

ACC Management Group - Site List

Property	Units	Address	City, State, ZIP	Property Discription	Average Occupancy %
5th Avenue Lofts	60	5821 5th Avenue	Kenosha, WI 53140	Section 42 - Family Site - 1 Building	97%
Lofts 2	44	5819 5th Avenue	Kenosha, WI 53140	Market Rate	98%
700 Lofts	49	700 W Michgan Avenue	Milwaukee, WI 53208	Section 42 - Family Site - 2 Buildings	93%
Anthem Luxury Living	80	431 Marion Road	Oshkosh, WI 54901	Market Rate - Family Site - 1 Building	97%
Arbor Green	48	6001 55th Street	Kenosha, WI 53142	Section 42/Section 8 Family site - 7 Buildings	98%
Arlington Heights / Glendale Heights	36	Scattered sites	Milwaukee, WI	Section 42 - Family Site - 2 Buildings	97%
Bay Hill	68	613 N 12th Avenue #101	Sturgeon Bay, WI 54235	Rural Development layered with Section 42 - Family/Senior Site.	96%
Bayfield Court	8	523 & 527 Bayfield Court	Jefferson, WI 53549	Market Rate	100%
Bayshore Townhomes	32	623 E. Main St.	Sparta, WI 54656	Section 42 - Family	100%
Bayside Senior Apartments	24	237 Cook Avenue	Oconto, WI 54153	Section 42/Senior site - 1 building	98%
Bayview Terrace City	36	537 South Neenah Avenue	Sturgeon Bay, WI 54235	Rural Development - Senior Site - 3 Buildings	98%
Bayview Terrace North	24	2261 Mill Rd.	Sister Bay, WI 54234	Section 8 senior site - 4 buildings	100%
Blackhawk Apartments	8	635 & 655 W. Blackhawk Dr.	Fort Atkinson, WI	Market Rate - Family Site - 2 Buildings	100%
Blackstone Harbor	24	10525 Judith Blazer Drive	Sister Bay, WI 54234	Section 42 - Family Site - 3 Buildings	100%
Bradley Crossing 60	60	4375 West Bradley Rd.	Brown Deer, WI 53209	Section 42 with 30 Sec 8 Vouchers - Family	98%
Bradley Crossing 54	54	4417-4423 West Bradley Rd.	Brown Deer, WI 53209	Section 42 - Family	98%
Central Park Towers	163	120 S State Street	Elgin, IL 60123	RAD - Section 42 - 2 Bulidings	97%
Century Building	44	808 North Old World 3rd Street	Milwaukee, WI 53203	Section 42 - Family Site - 1 Building	97%
Cranberry Woods Townhomes	40	2320-2330 16th St S; 2231-2241 14th St. S.	Wisconsin Rapids, WI	Section 42 - Family	100%
Deerwood Crossing	66	4195 W Bradley Road	Brown Deer, WI 53209	Section 42 - Senior Site - 1 Building	98%
Deerwood Crossing II	30	4195 W Bradley Road	Brown Deer, WI 53209	Section 42 - Senior Site - 1 Building	98%
Elven Sted Apartments	33	623 Eighth Street	Stoughton, WI 53589	Section 42 - Family Site - 3 Buildings	98%
Evan Manor	50	2123 91st St	Pleasant Prairie, WI 53158	Section 42 - Family/Senior - 2 Buildings	Lese up 5/1/19
Exchange @ 104	48	104 S. Main St.	Fond du Lac, WI 54935	Section 42 - Family Site - 1 Building (Historical)	95%
Fair Acre Townhomes	55	1911 N Main Street	Oshkosh, WI 54901	Section 42 - Family Site - 6 Buildings	97%
Fairview Crossing	40	728 Pleasantview Road	Plymouth, WI 53073	Rural Development - Family Site - 3 Buildings	97%
Fairview Crossing II	24	29 E. Paine Street	Kiel, WI 53042	Rural Development - Family Site - 3 Buildings	100%
Family Court Townhomes	74	Scattered sites	Elgin, IL 60123	RAD - Section 42 - Scattered Site	99%
Flagship: Dartford Bay - Landing	33	504 S. Mill Street	Green Lake, WI 54941	Section 8 Elderly & Family: 2 buildings, Senior - 25, Family - 8	96%
Flagship: Meadow Creek	37	1119 Roseland Drive	Kewaskum, WI 53040	Section 8 Elderly & Family: 3 Buildings, Senior - 25, Family - 12	96%
Fox Crossing Apartments	24	200 Bridge Street	Burlington, WI 53105	Section 42 - Family Site - 1 Building	98%
Fox Crossing II Apartments	32	180 Bridge Street	Burlington, WI 53105	Section 42 - Family Site - 1 Building	98%
Grand Ave Lofts	32	2905 W. Wisconsin Ave	Milwaukee, WI 53208	Section 42 - Family Site - 1 Building	95%
Hartford Highlands Apartments	44	633 E Monroe Ave	Hartford, WI 53027	Market Rate - Family Site - 3 Buildings	97%
Hotel President	84	500 Sycamore St.	Waterloo, IA 50703	Section 8/Section 42 - Elderly - 1 Building	95%
Ingram Place	53	456 E. Brown St.	Milwaukee, WI 53212	Section 42 - Family Site -1 Building	96%
Janesville Garden Court	164	208 N. Main St.	Janesville, WI 53545	Section 8 - Senior Site - 1 Building	97%
Jefferson Apartments	64	602 Collins Road	Jefferson, WI 53549	Section 8 - Section 42 - Rural Development - Family Site - 9 Buildings	97%
Kenwood Senior Living	24	1479 Pleasant Street	Ripon, WI 54971	Section 42 - Senior Site - 1 Building	98%
Lakeside Gardens	80	391A N. Peters Avenue	Fond du Lac, WI 54935	Section 42/Section 8 - Family Site - 17 Buildings	97%
Layton Square	57	3553 E. Layton Ave.	Cudahy, WI 53110	Section 42 - Family Site - 1 Building	96%
Maple Lawn	81	1914 Pike Drive #1	Fitchburg, WI 53713	Section 42 - Family Site - 7 Buildings	97%
Meadows of Mill Creek	24	247th Ave	Salem, WI 53168	Section 42 - Family Site - 12 Duplexes	98%
Mercantile Lofts	36	611 W. National Ave.	Milwaukee, WI 53204	Market Rate - Family Site - 1 Building	93%
Monroe Street Apartments	24	217 N. Monroe St.	Waterloo, WI	Section 42 - Family - 1 Building	95%
Nicolet Townhomes	60	1380 Scheuring Road	De Pere, WI 54115	Section 42 - Family Site - 9 Buildings	97%
Northwoods	72	2520 N. Martin Luther King Drive	Milwaukee, WI 53212	Section 42/Section 8 - Family Site - 2 Buildings	95%
Novation Senior Commons	60	2650 Novation Parkway	Madison, WI	Section 42 - Senior Site - 1 Building	In Lease Up
Oconomowoc School Apartments	55	623 Summit Ave	Oconomowoc, WI 53066	Section 42- Family Site - 1 Building	98%
Park Hill Senior Apartments	62	535 W. Concordia Avenue	Milwaukee, WI 53212	Section 8 - Senior Site - 1 Building	98%
Parkview Village	84	Scattered sites	Appleton, WI	Section 8 - Section 42 - Family	95%
Residences on Main	24	307 E Main St	Twin Lakes, WI 53181	Section 42 - Senior Site - 1 Building	100%
Rivers Edge	30	Scattered sites	Elgin, IL	RAD - Section 42 - Scattered Site	100%

ACC Management Group - Site List

Property	Units	Address	City, State, ZIP	Property Discription	Average Occupancy %
Scenic View Apts	48	205 Slinger Rd.	Slinger, WI 53086	RAD - Section 42	100%
Seven Oaks (formarly Nob Hill)	254	1108 Moorland Rd	Madison, WI 53713	Section 42 - Family Site - 7 Buildings	96%
Shoe Factory Lofts	55	224 W. Washington St.	Milwaukee, WI 53204	Section 42 - Family Site - 1 Building	98%
Silvercrest Apartments	36	630 S Cogswell Drive	Silver Lake, WI 53170	Section 42/Section 8 Senior/Family Site - 2 Buildings	99%
Silver Spring Square	48	5513-5517 & 5533-5537 N. Hopkins	Milwaukee, WI	Section 42/Section 8 Family site - 2 Buildings	96%
Terrace Heights	50	1321G Townline Rd	Wausau, WI 54403	Section 42/Section 8 - Family Site - 9 Buildings	98%
Harmony at Grandview Commons	94	114 Milky Way	Madison, WI	Section 42 - Family	95%
The Rivers Senior Living	60	475 Marion Road	Oshkosh, WI 54901	Section 42 - Senior Site - 1 Building	97%
The Rivers - Phase II	40	455 Marion Rd.	Oshkosh, WI 54901	Section 42 - Senior Site - 1 Building	99%
Uplands Homes	40	249 Musket Ridge Drive	Sun Prairie, WI 53590	Section 42 - Family Site - 18 Buildings	98%
Villa West	170	1650 9th St	Green Bay, WI 54304	Section 8 Elderly	99%
VMC Lofts	60	2122 56th Street	Kenosha, WI 53140	Section 42 - Family	Lease up 4/1/19
Waupaca County Apartments	148	Scattered sites	Waupaca County	Section 8 Eldery & Family	96%
Whitetail Ridge	60	25821 76th St.	Paddock Lake, WI 53168	Section 42 - Family/Senior - 2 Buildings	Lease up 5/1/19
Whitewater Woods	40	340 N Newcomb St Apt	Whitewater, WI 53190	Section 42 - Rural Development - 5 Buildings	95%
Whispering Echoes Townhomes	28	407 S. 5th St.	Winneconne, WI	Section 42 - Family	100%
Willow Heights	64	1460 Wellington Way	Decatur, IL 62526	Section 8 - Senior Site - 1 Building	95%
Woolen Mills	60	218 E. South Island St.	Appleton, WI 54915	Section 42 Family - 1 Building	100%
	4017				



PROJECT DESCRIPTION

DETAILED DESCRIPTION

Glen Grove is a proposed new construction development to be located in Cottage Grove, Wisconsin. The project will include 100 units in a three-story building all targeted to a mix of incomes ranging from 30-80% of County Median Income. A mix of 1-, 2-, and 3-bedroom units will be the first supply of non-senior affordable housing in Cottage Grove and will help provide affordable housing opportunities for the many families that work nearby. The project will be located at 505 W. Cottage Grove Road (please note, the address being used is approximate as it has not yet been assigned by the Village). Within just a half mile of the site you will find a grocery store, restaurants, highly regarded schools, parks, and child care centers.

Glen Grove will include a variety of amenities for residents including: community center, playground, community gardens, fitness center, business center, and free on-site parking. The large, 4-acre site allows for lots of room for residents and children to explore and play. 20% of the units will be set aside for households where at least one family member has a permanent disability. This fits with Movin' Out's mission of providing integrated, affordable housing solutions for individuals with disabilities. Movin' Out will work with local organizations to provide empowerment services to all residents along with resident service coordination to ensure residents have access to other services as needed.

Glen Grove will be financed utilizing WHEDA's 4% non-competitive tax credits along with other soft funding sources available in Dane County. Utilizing the non-competitive tax credit allows this project to proceed more quickly to help address Cottage Grove's need for affordable housing. Glen Grove anticipates closing and starting construction in the 2nd quarter of 2020.

UNIT MIX

Unit Type	Number of Units
1 bedroom - 30% CMI	9
1 Bedroom - 50% CMI	3
1 bedroom - 60% CMI	2
1 bedroom – 80% CMI	1
2 Bedroom - 30% CMI	4
2 Bedroom - 50% CMI	19
2 Bedroom - 60% CMI	5
2 Bedroom – 80% CMI	12
3 Bedroom - 30% CMI	4
3 Bedroom - 50% CMI	21
3 Bedroom - 60% CMI	5
3 Bedroom - 80% CMI	15
TOTAL	100



PROJECT DESCRIPTION

All 100 units will be targeted to household making between 30% and 80% of County Median Income. In order to best address the need for family housing in Cottage Grove, Glen Grove includes 45 affordable units with three bedrooms. The size of the parcel allows for a building and amenities that can accommodate a larger number of families.

It should be noted that the project is committed to a minimum 30-year period of affordability. Movin' Out, as a non-profit, will hold a right of first refusal. In keeping with our mission we are committed to preserving the affordability of all projects we have an ownership interest well beyond the initial 30-year period.

The units target more than one of the noted targeted populations for Dane County including households experiencing homelessness, very low-income families, veterans, and individuals with disabilities. Movin' Out has the unique opportunity to easily target these different populations in a thoughtful way that allows for truly integrated housing.

LOCATION

The site is on Cottage Grove Road in Cottage Grove in close proximity to many needed community services including a wide range of employers within one mile of this location. It also has nearby schools, grocery, clinics, and parks. The location also provides quick and easy access to multiple highly traveled highways allowing for easy commutes and access to all that Dane County has to offer.





PROJECT DESCRIPTION

DEVELOPMENT COSTS & PRO FORMA

Glen Grove will be financed with a mix of sources as noted below. It is important to note that, while this project does utilize WHEDA tax credits, the credits are 4% non-competitive credits. This allows the project to move forward more quickly and not be subject to additional competitive process outside of the Dane County Funds this application addresses. The WHEDA 4% application has been submitted and an award letter was included in our AHP application submitted mid-June. We will be applying to the State of Wisconsin for the State HOME funds late summer to early fall.

<i>Sources</i>		<i>Uses</i>	
WHEDA First Mortgage	\$10,203,251	Acquisition	\$1,015,000
LIHTC Equity	\$5,854,859	Hard Costs	\$15,260,180
AHP Funds	\$900,000	Soft Costs & Reserves	\$2,567,937
State HOME	\$500,000	Developer Fee	\$3,340,371
TIF	\$250,000	PV System	\$200,000
Dane County Affordable Housing Fund	\$1,550,000		
WHEDA Sub Debt	\$1,457,607		
Deferred Developer Fee (50%)	\$1,667,771		
TOTAL - \$22,383,488		TOTAL - \$22,383,488	

The project will be deferring half of its developer fee in accordance with WHEDA requirements for 4% projects but is able to pay back the deferred fee within the 15-year compliance period.

USE OF COUNTY FUNDS

Glen Grove has already applied for and received initial documentation for the 4% LIHTC award from WHEDA. An application for the Federal Home Loan Bank of Chicago was submitted in June with a score that is considered amongst the highest our member bank was aware of. Assuming the AHP application is successful the financing gap for the project is \$1,550,000 which is the amount being applied for from Dane County in this application. The project is also deferring 50% of the developer fee in accordance with WHEDA standards. The project needs almost fifteen years to fully pay back that deferred fee. Should Glen Grove receive funding from Dane County, the costs will directly fund capital costs via a grant or loan through the Dane County Housing Authority. Movin' Out and our legal counsel (Foley & Lardner) are very experienced in structuring projects with similar requirements.



PROJECT DESCRIPTION

PROJECT BUDGET

USES OF FUNDS	Total Construction	Post Construction	Total Permanent
Acquisition & Site Costs			
Land Costs	1,015,000	-	1,015,000
Construction & Commercial Costs			
Residential Construction NC	13,160,820	-	13,160,820
General Requirements	658,041	-	658,041
Contractor Overhead	276,377	-	276,377
Contractor Profit	704,762	-	704,762
Construction Contingency	740,000	-	740,000
Solar	200,000	-	200,000
Engineering & Architectural			
Architecture & Engineering	311,400	-	311,400
Survey	12,000	-	12,000
Geotech/Soils	10,000	-	10,000
Construction Interest & Fees			
Insurance	50,000	-	50,000
Construction Interest	450,000	-	450,000
Construction Title and Recording	35,000	-	35,000
Construction Loan Origination	147,000	-	147,000
Lender Third Party Costs	15,500	-	15,500
Construction Period Taxes	25,000	-	25,000
Permanent Financing			
Perm Loan Origination Fee	174,913	-	174,913
Perm Loan Legal	30,000	-	30,000
Soft Costs			
Market Study & Appraisal	11,500	-	11,500
Tax Credit Fees	67,478	-	67,478
Soft Cost Contingency	30,000	-	30,000
Marketing	20,000	-	20,000
Cost Certification	20,000	-	20,000
Furnishing	30,000	-	30,000
Consulting	150,000	-	150,000
Accounting	47,500	-	47,500
GP Legal Fees	75,000	-	75,000
Syndication Costs			
Investor Fee	65,000	-	65,000
Developer Fees / Reserves			
Developer Fee	365,025	3,019,334	3,384,358
Consultant fee	-	-	-
Operating and DS Reserve - 4 months	-	601,016	601,016
Rent Up Reserve	110,000	-	110,000
Total Uses Of Funds	\$ 19,007,316	\$ 3,620,350	\$ 22,627,666

Glen Grove - 15 Year Pro Forma

Cottage Grove 4%		PAGE 8															
FORECAST OF NET CASH FLOW FROM OPERATIONS		WHEDA CASH FLOW															
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	TOTAL
		2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	
Income																	
Rental Income		\$ 1,337,676	\$ 1,364,430	\$ 1,391,718	\$ 1,419,552	\$ 1,447,944	\$ 1,476,902	\$ 1,506,440	\$ 1,536,569	\$ 1,567,301	\$ 1,598,647	\$ 1,630,620	\$ 1,663,232	\$ 1,696,497	\$ 1,730,427	\$ 1,765,035	\$ 23,132,989
Less: Vacancy	-7.0%	(93,637)	(95,510)	(97,420)	(99,369)	(101,356)	(103,383)	(105,451)	(107,560)	(109,711)	(111,905)	(114,143)	(116,426)	(118,755)	(121,130)	(123,552)	(1,619,309)
Other Income		12,000	12,240	12,485	12,734	12,989	13,249	13,514	13,784	14,060	14,341	14,628	14,920	15,219	15,523	15,834	207,521
Less: Vacancy	-7.0%	(840)	(857)	(874)	(891)	(909)	(927)	(946)	(965)	(984)	(1,004)	(1,024)	(1,044)	(1,065)	(1,087)	(1,108)	(14,526)
Effective Gross Income		1,255,199	1,280,303	1,305,909	1,332,027	1,358,667	1,385,841	1,413,558	1,441,829	1,470,665	1,500,079	1,530,080	1,560,682	1,591,895	1,623,733	1,656,208	21,706,674
Expenses																	
Operating Expenses	3.0%	327,000	336,810	346,914	357,322	368,041	379,083	390,455	402,169	414,234	426,661	439,461	452,644	466,224	480,211	494,617	6,081,845
Real Estate Taxes		100,000	103,000	106,090	109,273	112,551	115,927	119,405	122,987	126,677	130,477	134,392	138,423	142,576	146,853	151,259	1,859,891
Management Fee		75,312	77,571	79,898	82,295	84,764	87,307	89,926	92,624	95,403	98,265	101,213	104,249	107,377	110,598	113,916	1,400,720
Reserve for Replacement		30,000	30,900	31,827	32,782	33,765	34,778	35,822	36,896	38,003	39,143	40,317	41,527	42,773	44,056	45,378	557,967
Total Operating Expenses		532,312	548,281	564,730	581,672	599,122	617,095	635,608	654,677	674,317	694,546	715,383	736,844	758,950	781,718	805,170	9,900,424
Net Operating Income		722,887	732,021	741,179	750,355	759,546	768,745	777,949	787,152	796,348	805,532	814,697	823,838	832,946	842,015	851,038	11,806,251
Debt Service																	
First Mortgage - WHEDA		602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	9,036,084
Total Debt Service		602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	602,406	9,036,084
<i>DCR 1st Mtg</i>		1.20	1.22	1.23	1.25	1.26	1.28	1.29	1.31	1.32	1.34	1.35	1.37	1.38	1.40	1.41	
Cash Flow		120,481	129,616	138,773	147,950	157,140	166,340	175,544	184,747	193,943	203,127	212,292	221,432	230,540	239,610	248,633	2,770,166
Asset Management Fee																	
	3.0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Cash Flow		120,481	129,616	138,773	147,950	157,140	166,340	175,544	184,747	193,943	203,127	212,292	221,432	230,540	239,610	248,633	2,770,166
Debt Service																	
Second Mortgage - WHEDA		67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	1,009,729
Total Debt Service		67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	67,315	1,009,729
<i>DCR All Mtg</i>		1.079	1.093	1.107	1.12	1.13	1.15	1.16	1.18	1.19	1.20	1.22	1.23	1.24	1.26	1.27	
Cash Flow		53,166	62,300	71,458	80,634	89,825	99,024	108,228	117,431	126,628	135,811	144,977	154,117	163,225	172,294	181,318	1,760,437
Deferred Developer Fee - 50%																	
Payment	1,667,771	53,166	62,300	71,458	80,634	89,825	99,024	108,228	117,431	126,628	135,811	144,977	154,117	163,225	172,294	181,318	1,667,771
<i>Current Balance</i>		1,614,605	1,552,305	1,505,255	1,480,847	1,391,022	1,291,998	1,183,770	1,066,339	939,711	803,900	658,923	504,806	341,581	169,287	56,228	
Cash Flow		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	68,258

PROJECT LOCATION

Glen Grove is located at 505 W. Cottage Grove Road in Cottage Grove. It should be noted that this address is approximate until an address is provided for the vacant parcel. This location is located outside of the City of Madison in the Village of Cottage Grove. Cottage Grove does not have any existing LIHTC, affordable family developments to-date.





PHOTO VOLTAIC ARRAY

Movin' Out is committed to incorporating a Solar PV system at Glen Grove. We have already met with GS Solar to begin the design process and better understand the solar capacity of the building. Solar-ready specs are already included in the initial design. We are applying for an additional \$50,000 from Dane County to help cover the costs of this system. Based on initial cost estimates, we anticipate that it will cost at least \$200,000 on a direct purchase approach. We have budgeted the purchase price to incorporate into the project upon construction completion.



PROJECT FINANCING & LEVERAGE

Glen Grove will be financed with a mix of sources as noted below. It is important to note that, while this project does utilize WHEDA tax credits, the credits are 4% non-competitive credits. This allows the project to move forward more quickly and not be subject to additional competitive process outside of the Dane County Funds this application addresses. The WHEDA 4% application has been submitted and an award letter was included in our AHP application submitted mid-June. We will be applying to the State of Wisconsin for the State HOME funds late summer to early fall.

Sources (% of total)		Uses	
WHEDA First Mortgage (46%)	\$10,203,251	Acquisition	\$1,015,000
LIHTC Equity (26%)	\$5,854,859	Hard Costs	\$15,260,180
AHP Funds (4%)	\$900,000	Soft Costs & Reserves	\$2,567,937
State HOME (2%)	\$500,000	Developer Fee	\$3,340,371
TIF (1%)	\$250,000	PV System	\$200,000
Dane County Affordable Housing Fund (7%)	\$1,550,000		
WHEDA Sub Debt (6%)	\$1,457,607		
Deferred Developer Fee (8%)	\$1,667,771		
TOTAL - \$22,383,488		TOTAL - \$22,383,488	

The project will be deferring half of its developer fee in accordance with WHEDA requirements for 4% projects but is able to pay back the deferred fee within the 15-year compliance period.

The County Affordable Housing Development Funds are needed to ensure the feasibility of this development and total just 7% of the total sourcing. We have requested the amount needed to fill the financing gap after applying many other soft funds. Obtaining the County Funds will allow this project to move forward quickly without any concern about other competitive sources. We have requested \$1,550,000 of which \$50,000 is to be allocated to the PV system. The remaining \$1,500,000 requested works out to only \$15,000 per affordable units. Glen Grove heavily targets larger units consistent with the Village's stated need for affordable family units. The \$1,500,000 works out to approximately \$6,500 per affordable bedroom.



FAIR TENANT SELECTION

Movin' Out agrees to the elements outlined in Attachment E of the RFP – Fair Tenant Selection Criteria. Movin' Out has been working diligently with ACC Management over the past two years to further refine the Tenant Selection criteria to ensure flexibility to individuals and families facing obstacles in obtaining safe, decent, affordable housing. Movin' Out's own referrals are often individuals moving out of non-traditional housing (ie living at home with parents, living in a group home, etc.) that don't often allow them to pass more stringent selection criteria. All residents are screened using the same criteria to ensure compliance with Fair Housing. All residents should feel safe and secure in their home knowing that steps were taken to ensure the health and safety of all households.

Movin' Out will work with ACC to develop a Tenant Selection Plan that clearly identifies the requirements for approval. We will not deny an applicant based solely on one of the noted criteria in Attachment E and will implement a denial process that incorporates the noted Denial Process criteria.



TENANCY ADDENDUM

Movin' Out agrees to the elements outlined in Attachment F of the RFP – Tenancy Addendum. Movin' Out has been working with ACC Management to allow for the noted provisions within all tenant leases or as an addendum to all tenant leases.

HOUSING FIRST



Movin' Out is committed to working with the Dane County Homeless Services Consortium as part of our referral and service process for Glen Grove to help address the County's Housing First goals. We have developed a relationship and plan with The Road Home to target up to five of the two- and three-bedroom 30% units at Glen Grove to families experiencing homelessness.

It should be noted that this partnership provides for mission and unit-targeting alignment between Glen Grove and The Road Home. The Road Home's program includes households where a family member has a disability. Glen Grove has committed to setting aside 20 units to households where one family member has a permanent disability. These units will be spread across unit types with the deepest targeting (30% CMI) available to The Road Home. These units completely align and allow the integration of a preference for families experiencing homelessness without changing the overall project goals or stressing the project financially.

The process for homeless units at Glen Grove is that the property manager would reach out to The Road Home when there was a unit available. The Road Home would then work with the Homeless Services Consortium Priority List to identify a household to refer to management for the next step of the applicant screening process. For any households that The Road Home refers and is accepted, The Road Home will provide necessary supportive services either directly or through partnerships within the Consortium. In addition, Glen Grove has a comprehensive service plan that ensures all residents have access to supportive services to ensure long-term housing success. More details about services can be found in the Supportive Services Plan tab. In addition, attached is a letter from The Road Home noting their commitment to Glen Grove.



Every child deserves a home

July 15, 2019

Megan Schuetz
Movin' Out, Inc.
902 Royster Oaks Drive
Suite 105
Madison, WI 53714

RE: Glen Grove – 505 W. Cottage Grove Rd., Cottage Grove, WI

Dear Megan,

Thank you for taking the time to meet with us recently to discuss a potential partnership opportunities. The Road Home Dane County is committed to working together on the above noted development. The Road Home intends to work with Movin' Out to provide referrals for up to five units at Glen Grove. The Road Home works with families experiencing homelessness and, in addition, with families where one family member has a disability. The referrals that we provide for Glen Grove will be families from the community housing priority list where one family member has a disability. This aligns with both of our missions.

The Road Home will also ensure access to supportive services for all families it refers to Glen Grove. It should be noted that there are multiple agencies in the Homeless Services Consortium of Dane County and we all work together to ensure families and individuals have access to services that best fit their needs. The Road Home directly provides some of these services and can also works as a service coordinator to link people to other appropriate providers in our network.

We look forward to working with Movin' Out on this development.

Sincerely,

A handwritten signature in black ink, appearing to read 'KRISTIN RUCINSKI', is written over a light blue horizontal line.

Kristin Rucinski
Executive Director





SUPPORTIVE SERVICES PLAN

Movin' Out has established Memorandums of Understanding with the following organizations: Care Wisconsin (adults with physical and/or developmental disabilities and frail elderly); Dane County Department of Human Services (children with disabilities and mental health services); and Dane County Veterans Service Office (veterans). We are working with The Road Home/Homeless Services Consortium (individuals and families experiencing homelessness) to develop an agreement as well. Attached you will find a letter indicating The Road Home's commitment to Glen Grove. In addition to these relationships, Movin' Out has an established Community Impact Program that provides service coordination between the above mentioned groups, residents, and property management. Movin' Out also coordinates empowerment services available to all residents such as financial literacy, income tax preparation, and first time homebuyer education. The role of the Community Impact Coordinator is to serve as a conduit between a resident and all community connections (services, neighbors, property management) in order to ensure the long term success of the resident. Residents that Movin' Out works with directly are often long-term, successful residents that contribute to the success of the community they live in.

More details on services and Movin' Out's Community Impact Program can be found in the attached Service Plan.

Movin' Out

Supportive Services Plan

For Glen Grove Apartments

Glen Grove will provide 20 units of supported housing which will be targeted for and affirmatively marketed to income qualified households with a range of support service needs. Qualified households include households with one or more family members served by the Long-Term Care System (people with physical and developmental disabilities and elderly); the Dane County mental health service system; the Dane County Children's Long- Term Support system; the Dane County Veteran's supportive services system and the Dane County Homeless Consortium supportive services system. There is a wide array of services available under each of these systems. Each of these service providing systems has long and extensive experience in their respective areas and provides support to several thousand people in Dane County each year.

With over 25 years of experience, Movin' Out has established working relationships with each of these systems to both receive referrals for those seeking permanent housing that is linked with their supportive services as well as coordinating with these systems to help these residents to successfully maintain their housing. Attached to the application are executed Memorandums of Understanding (MOUs) between Movin' Out and agencies actively working in each of these systems to reserve up to 20 of the project units. Residents of Glen Grove will be made aware of these services by Movin' Out and the property manager who will refer those interested in accessing these service systems to the appropriate contacts. The supported housing units will be marketed on a first-come, first-served basis to qualified residents. It is important to note that in many cases the households seeking supported housing are often served by more than one of the systems described below.

Movin' Out Community Impact Program

To support of these integrated supported housing units, Movin' Out also directly staffs and operates a program called the Community Impact Program (CIP). CIP is designed to both help coordinate services as well as to create and strengthen connections between all residents in the development and the surrounding community. Our Community Impact Program goals are to help the residents in all of our rental housing be successful as tenants and as full citizens. We view our rental communities as social platforms for both the residents and the surrounding neighborhoods empowering them to strive to reach their full potential. The CIP is intended to provide the tools and connections to realize this goal. Specifically, the CIP staff establishes personal connections with the residents in our rental communities and assists in ensuring that they are connected to the larger community and, if desired, supportive services. Additionally, this program coordinates and provides a range of empowerment educational services such as financial literacy, assistance with income tax preparation, home ownership education and other informational sessions aimed at improving life skills. These services are funded with earned income from Movin' Out's other program activities and are provided on site or other convenient locations as needed.

The supportive service descriptions below provide information regarding each of the third-party service systems and the key service providers that Movin' Out actively works with to both affirmatively market the units and to coordinate with during the resident's tenancy. It is important to note that the array of services systems briefly described below are often complex to navigate, each with their own rules and regulations, each administered in different ways by different levels of government. Often these systems are not well connected or coordinated with each other and often not coordinated or integrated with needed housing resources. Movin' Out's Community Impact Program is designed to overcome and address issues that may arise as a result of this and to help ensure retention of residents in their homes.



Movin' Out's approach to developing, owning and operating integrated supported housing is to provide the residents in these units with ready access to a wide range of coordinated support service systems they may need to be successful residents. Through our experience in operating integrated supported housing we have come to understand that people often need individualized support with access to a wide range of services. Sometimes those service needs overlap different service systems and often people's service needs change over time. Movin' Out's Community Impact Program is designed to assist in coordinating and navigating these issues. We have established linkages to the following supportive services systems to meet these needs.

Adult Long-Term Care Support System – This system provides individually tailored services to people with physical and/or developmental disabilities and frail elderly people. These services are paid for through Medicaid funds and, in Wisconsin are administered by a network of regional managed care organizations under a program called Family Care. The Managed Care Organizations (MCO's) contract with a range of different direct care service providers who together provide highly individualized services that are delivered both in their homes and in the community. Services are available on a regularly scheduled basis. These services include:

- helping to maintain good nutrition, hygiene and health;
- managing budgets and bill paying;
- establishing a domestic routine;
- establishing a safe environment and safe practices;
- providing quick response to emergencies;
- helping to maintain good relationships with housemates, neighbors, resident association members, friends, co-workers, and family members;
- monitoring and dispensing medication;
- assisting in securing employment including supported employment in the community;
- assisting in using public transportation;
- providing assistance with exercising responsibility, making choices, and providing direction and decision-making
- assisting with developing and implementing a service plan that reflects one's own needs and preferences.

Movin' Out has a Memorandum of Understanding with Care Wisconsin, one of the state authorized Family Care MCO's, who will provide referrals of prospective residents to the project and commits to providing the services listed above through its network of direct care service providers. Our primary contact at Care Wisconsin is Karen Hitchcock, Vice President, Member Experience. Additional information describing the services offered by Care Wisconsin is included with the attached MOU (Exhibit 1) between Movin' Out and Care Wisconsin.

Children's' Long-Term Care Support System - The Children's Long-Term Support (CLTS) Program is a Home and Community-Based Service (HCBS) program that provides Medicaid funding for children who have substantial limitations in their daily activities and need support to remain in their home or community. Eligible children include those with developmental disabilities, severe emotional disturbances, and physical disabilities. Funding can be used to support a range of different services based on an assessment of the needs of the child and his or her family. Examples of these services are respite services for primary care givers (parents); case management; home modifications and supportive home care. Movin' Out works with families who have children with disabilities and are supported by this system. In many cases, families in this situation are supported to assist one another through peer support efforts. Having access to stable and affordable housing in proximity to employment and services is an important factor in assisting these families to support and nurture their children. In Dane County, these services are administered by Dane County Department of Human Services. These services are provided both in people's homes or in the community depending on the nature of the service. Movin' Out has a Memorandum of Understanding (Exhibit 2) with Dane County who will provide referrals of prospective residents to the project and commits to providing the

services listed above through its network of direct care service providers. Our primary contact with Dane County CLTS program is Monica Bear.

Mental Health Services – In Dane County, mental health services are provided by the Dane County Department of Human Services and are provided for both adults and children. These services are paid for through a combination of Federal Medicaid, State and County funding. The services offered are provided both in people’s homes and in the community depending on the type of service. There are an array of community support and case management services provided to help people with mental illnesses thrive in a community setting. There are two primary Mental Health programs offered by Dane County. One way these supports are provided is through the Community Support Program, or CSP. A CSP is a coordinated care and treatment program which provides a range of treatment, rehabilitation, and support services through an identified treatment program and staff to ensure ongoing therapeutic involvement, individualized treatment, rehabilitation, and support services. They provide comprehensive services and staff outreach to people living in the community. Almost all of the services (medications, case management, work services, counseling, activities of daily living, ongoing problem solving, etc.) are provided through interdisciplinary teams within these programs. All people being considered for treatment in these programs must have a serious and persistent mental illness.

The second primary service delivery program is called the Comprehensive Community Services Program (CCS). This program provides case management and what the County calls, an “open provider network”. This means that the client, together with their case manager, determines the type and source of services they will receive from an array of different contracted providers. In addition to these primary service delivery systems, the Dane County Mental Health System offers a number of other programs through various contracts with other community based providers that supplement the support service needs for the County. Included with the attached MOU is a Mental Health System chart that lists the full range of services offered.

Movin’ Out has a Memorandum of Understanding (Exhibit 3) with Dane County Department of Human Services who will provide referrals of prospective residents to the project and commits to providing the services listed above through its network of direct care service providers. Our primary contacts at Dane County Mental Health are Julie Meister and Carrie Simon.

Veterans Service - The Dane County Veterans Service Office is the point of contact in Dane County for veterans seeking various services. Their mission is to assist veterans and their families with obtaining local, state and federal benefits. Assistance includes helping them discover the benefits to which they are entitled and assist them with the application process. They provide access to a range of benefits that include veteran specific counseling, assistance with paying for housing costs and medical care. These services are primarily provided off-site at various locations depending on the nature of the service. Movin’ Out has a Memorandum of Understanding (Exhibit 4) with the Dane County Veterans Service Office who will provide referrals of prospective residents to the project and provides veterans with access to a wide range of veteran specific services through a variety of veteran benefit programs. Dan Connery is our primary contact person at the Dane County Veterans’ Service Office.

Homeless Services - In Dane County, homeless services are coordinated through the Homeless Services Consortium of Dane County which is a partnership of agencies, funders, advocates, and formerly homeless persons committed to preventing and ending homelessness. This system provides a wide array of services to assist families and individuals experiencing homelessness to address their housing and service needs. Many of these service providing agencies also coordinate with the service systems described above. Some of them also own and operate housing themselves while others assist people to access housing in the community. Several of these providers focus on specific household types such as families with children, single men or single women. The services they provide include case management and coordination with a range of other services providers. Their services are provided on site or at easily accessible community locations. Movin' Out is currently working with The Road Home, which focuses on families with children, to identify a plan for this development. Movin' Out and The Road Home have mission alignment in that both groups have programs that focus on households with a family member that has a disability. It would be this market that we would serve at Glen Grove. Their services are funded primarily through contracts and by local funding sources. The Road Home has committed to working with Movin' Out on referral and supportive services for up to five units at Glen Grove. The Road Home will ensure that any referrals it provides to Glen Grove will be provided services through The Road Home or other Homeless Services Consortium members. Attached you will find a letter from The Road Home noting their interest and commitment to Glen Grove. Our primary contact with The Road Home is Kristin Rucinski.

Exhibit 1

Glen Grove Apartments Housing Plan for Tenants with Special Needs

Memorandum of Understanding

This Memorandum Of Understanding is an understanding between Care Wisconsin's Family Care and Partnership programs and Movin' Out, Inc. (Movin' Out), the affordable rental housing provider, and represents the agreement of the two parties on the delivery of housing and services that will enhance independent living success and promote the dignity and independence of the tenants receiving supportive services.

Services Offered:

1. Movin' Out will reserve up to 20 of 100 units of the residential rental units in its Glen Grove Apartment development in the Village of Cottage Grove, WI. for tenant households that include at least one tenant with disabilities who relies on supportive services coordinated and funded by Care Wisconsin's Family Care and Partnership programs. Movin' Out commits to accommodate the delivery of supportive services for the life of the project.
2. The initial pool of tenants for up to 20 of the units will be people with cognitive, mental, behavioral, and physical disabilities who are members of Care Wisconsin's Family Care and/or Partnership programs, live in Dane County and who are referred by Care Wisconsin care teams. Final determination of who will be selected as initial tenants will be made by Movin' Out or the professional property management company designated by Movin' Out, with recommendations from Care Wisconsin care teams.
3. Movin' Out will provide services and amenities to meet the following needs of tenants who rely on supportive services:
 - a. Tenants with disabilities need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable, subject to compliance with lease terms.
 - b. Tenants with disabilities 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 the sources of development funding assure continuous affordability for qualified tenants in 38 units, 8 of which will be supported housing units.
 - c. Tenants with disabilities need disability-sensitive property management. Movin' Out's property management partner is tailored to tenants whose disabilities may require individualized accommodations. Property management will coordinate with and complement day to day supportive services.

- d. Tenants with disabilities need ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens. Movin' Out will develop housing units built to accommodate the 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.
- 4. Care Wisconsin will provide comprehensive case management based upon individual tenant's assessed needs.
 - a. Tenants with disabilities may need individualized in-home support services available on a regularly scheduled basis and/or on short notice. Care Wisconsin contracts with providers to support the identified and assessed needs of each individual member. Services that may be supported by Care Wisconsin include 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.
- 5. Care Wisconsin will coordinate providers to assist members with meeting their assessed needs. The tenants designated for supportive services will have Member Centered 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 services as appropriate, including choosing their caregivers and service providers. For the purpose of this project, prospective residents will be provided supports as identified in their individual Member Centered Plan. These supports may include:
 - a. Financial Management: Care Wisconsin will assess needs, preference, and aptitudes for increasing economic self-sufficiency. Care Wisconsin members may be eligible for vocational services or adult day services. Employment and career counseling may provide planning assistance in achieving employment by connecting enrolled members to community resources, providing career exploration, and performing informational interviewing with professionals and employers. Vocational services can address barriers to employment by connecting tenants to a Benefits Specialist who will explain how employment will affect benefits and what work incentives are available. Members may have access to assistive technology consultation. Assistive technology services can help a person with a disability in the selection, purchase, and/or use of tools designed to make his or her life easier or more independent. Financial literacy training may be available to increase understanding and build good practices in handling money and credit.

- b. Supportive Home Care: Staff can support tenants in their homes and remotely to ensure safety and provide supervision as needed. Amounts of support range from the potential for 24 hours per day in some instances to come-in support a few hours each day or week.
- c. Self-Directed Services/ Autonomy and Choice: providers chosen by tenants can ensure that individuals have choice about where and with whom they live, how personal time is used and what services are received.
- d. Relationships/Community Involvement: the supportive services provider can assist with opportunities to develop and maintain relationships with friends, family and community members. Individuals will have opportunities to participate in community life and may receive support to help in coordinating plans, help with maintaining relationships with friends and neighbors, and/or the coordination of transportation, as needed, to get to the right place at the right time.
- e. Organization/Communication: the supportive services provider staff may work cooperatively with individuals to plan and organize daily routines, including coordinating transportation, special events, communicating as needed with other service providers, care management team, and family members.
- f. Medication Assistance and Medical Advocacy: Staff may assist each person, as needed, with medication administration, ensuring accuracy and consistency of needed medications. Staff can also attend medical appointments to assist individuals with communicating with medical providers and advocating on their behalf. Staff can work with the individuals and their teams to ensure medical appointments are attended, when necessary, and that any medical issues that arise are attended to promptly and appropriately. Staff can monitor the need for follow up appointments and maintain documentation of medical history.
- g. Personal Care: As assessed, Staff may 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 other necessary assistance.
- h. Home Maintenance: Staff may assist, to the degree necessary, with home maintenance including cleaning all areas of the apartments, organizing, laundry, and maintaining a safe home environment.
- i. Meal Planning/Groceries: The supportive services provider may assist with meal planning, nutrition education and grocery shopping for each individual, as needed. This may include planning weekly menus, making grocery store lists, providing transportation to the grocery store and assistance with purchasing groceries. Supportive services may also include education and/or guidance around special dietary requirements (e.g., diabetic diet) and healthy eating.

How Services will be Planned and Funded

The initial tenants are expected to be eligible for supportive services funded and coordinated by Care Wisconsin. Prospective tenants may choose to utilize a Care Wisconsin contracted agency or they may choose to self-direct the supports in their Member Centered Plan, as appropriate.

The Aging and Disability Resource Center of Dane County will offer prospective tenants with disabilities a central source of information, assistance and access to community resources for older people and people with disabilities, as well as their families. Personalized assistance is available at the resource center, over the telephone, or in visits to an individual's home.

Professional staff will assist adults to sort through options and make informed decisions.

For Care Wisconsin:

For Movin' Out, Inc.:

Karen Hitchcock
Karen Hitchcock, VP External Affairs

Kathryne Auerback
Kathryne Auerback, Executive Director

June 25, 2019
Date

7-10-19



Care Wisconsin: At A Glance

1 (800) 963-0035 | carewisc.org

Mission & Values

To promote the quality of life of our communities by empowering others and working together to creatively solve unique health and long term care needs. To operate on a sustainable financial basis through growth and continuous improvement. Our culture is based on integrity, accountability and treating our members, partners and each other with dignity and respect.

Family Care

Long-term care services and supports. Encourages independence and member choice.

8717

44 counties

Medicaid SSI

Insurance for people who receive Supplemental Security Income and have Medicaid.

2894

36 counties

Partnership

Long-term care services plus acute and primary health insurance for individuals with nursing-home level of care.

1934

8 counties

DSNP

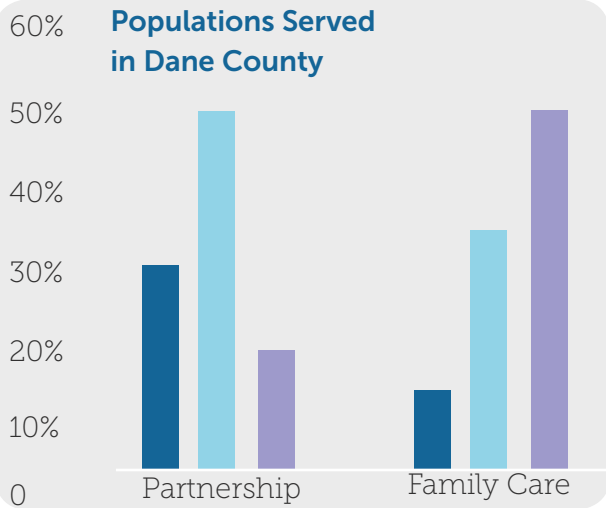
Special needs Medicare Advantage insurance plan provides Medicare Parts A, B & Part D to members.

535

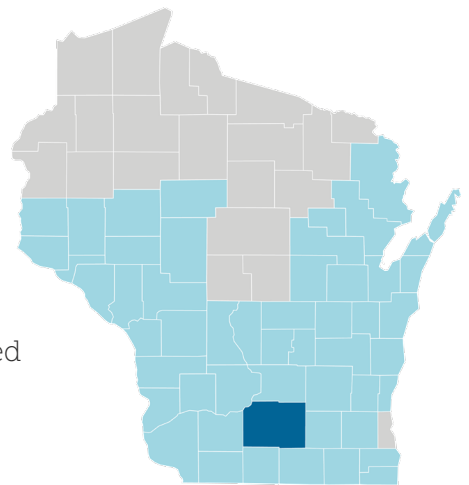
31 counties

Funded through Medicaid

Funded through Medicaid & Medicare



- Intellectually / Developmentally Disabled
- Frail Elderly
- Physically Disabled

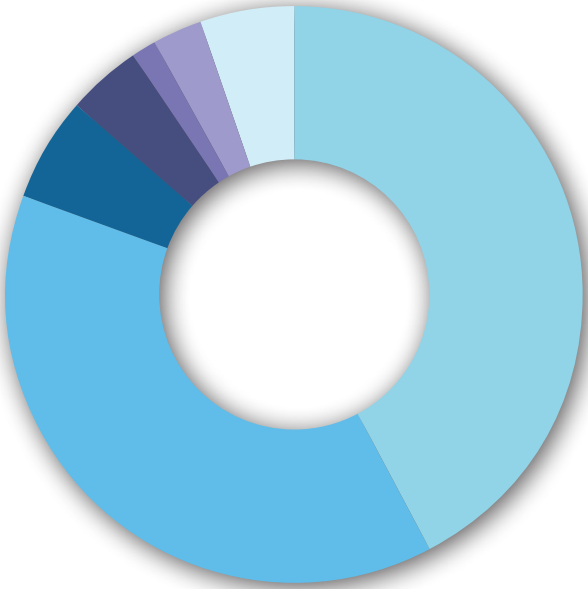


Self-Directed Services

Over 2,000 Care Wisconsin members are in our Self-Directed Supports (SDS) program, which means they manage part or all of their services. We focus on each member's unique abilities and support their choices to improve outcomes.

Integrated Employment

We have a team dedicated to finding employment opportunities for our members. More than 2000 members are gainfully employed, building their confidence and community contributions.



- integrated community employment (929)
- community based pre-vocational (130)
- facility based pre-vocational (842)
- work crew or enclave (88)
- trial work experience (33)
- self-employed (46)
- unsure / other employment (127)

Employees

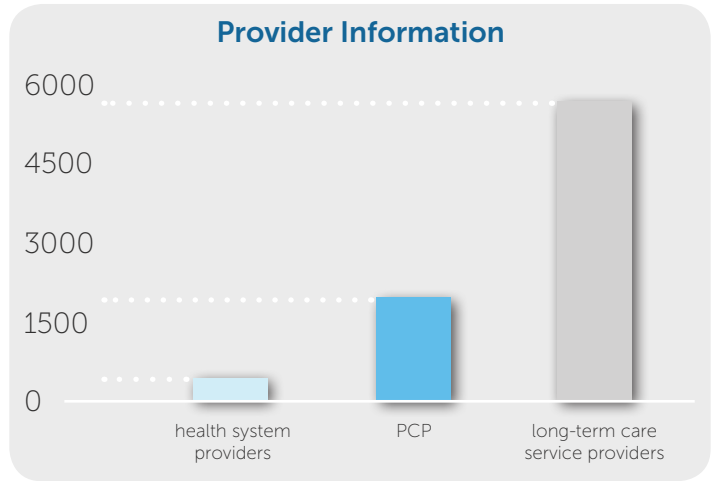
Our employees live and work in 52 Wisconsin counties. This “local” presence enables our staff to develop a deep understanding of their community needs. Beyond work hours, our staff are active volunteers, investing thousands of personal hours to their communities. Turnover at Care Wisconsin is low. We have employees regularly celebrating five, 10, and even 20 year anniversaries with our organization.



Care Wisconsin received an overall rating of 5 out of 5 stars by the Centers for Medicare and Medicaid Services for the 2019 plan year. This rating includes performance for Medicare Parts C & D. For more information on CMS’ Star Ratings, visit www.medicare.gov.

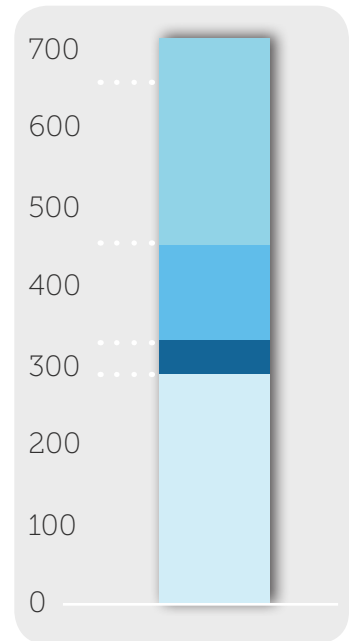
Providers

Our provider network includes a mix of acute, primary, and long-term care supports. We manage more than 10,000 active provider contracts.



Employee Information

- employees statewide (720)
- care staff (450)
- employees in Dane County (332)
- administrative staff (270)



Who is Care Wisconsin?

What do we do?

Care Wisconsin is a nonprofit organization that matches frail seniors and adults with physical or intellectual/developmental disabilities to the health and long-term care services they need. We help our members live as independently as possible.

We focus on member-centered care by helping our members develop their own care plans using cost-effective services and care coordination.

Our Mission

To promote the quality of life in our communities by empowering others and working together to creatively solve unique health and long-term care needs.



Contact Us

We're here to help you!

To learn more about the Family Care Program contact your local ADRC!

Your Aging and Disability Resource Center (ADRC)

[LABEL GOES HERE]

Your Local Care Wisconsin Office

[LABEL GOES HERE]



Visit

carewisc.org/family-care/



Call Toll-Free

1 (800) 963-0035 | TTY WI Relay 711

Interpreter and translation services are available free of charge. This document may be available in other forms upon request. If you have special needs, please call 1(800) 963-0035 for help. Family Care is a public program that provides long-term care services through the Wisconsin Department of Health Services. Care Wisconsin has a contract with Wisconsin Medicaid to offer Family Care and is a state-certified care management organization. Equal Opportunity Employer

FCB_3-2019 Family Care Brochure Text | 03/19/2019

CARE WISCONSIN

Family Care

The Family Care program helps frail elders & adults with disabilities manage their long-term care services.

Caring starts here.

What is Family Care?

The Family Care program helps frail elders and adults with different accessibility needs manage their long-term care services. The program balances members' independence with the support they need in order to thrive.

As a Family Care member, you are at the center of your care team which includes a Care Manager and a Registered Nurse. Together they will assess your abilities and suggest the services to help you stay independent. From there, the team creates a plan just for you to support your long-term care needs.

”

My team is amazing. I always get follow ups... Fast, speedy, and informative; I am getting all the care I need.

- Real Member Quote



What types of services could be a part of my care plan?

Your care plan includes services to help you manage your well-being. Here are a few examples of services that may be available to you:



In Home Supports & Meaningful Day Activities

Home-delivered meals, personal cares & skilled nursing, adult day care and employment supports



Transportation

Specialized transportation to your appointments



Medical Equipment & Supplies

Walkers, blood sugar monitors, and oxygen equipment



Skills Training

Daily living skills training and training services for unpaid caregivers



Therapy Services

Counseling, physical therapy, occupational therapy, and speech and language pathology services

Who is on my Care Team?

Your Care Team is here to assist you!



You, the Member...

are the most important part of any care team! Your care manager and nurse will work with you to develop a plan that identifies what you can do to live as independently as possible. You will also discuss how you will work toward your goals and participate in continued check-ins with your care team. Together, the team will make sure your care plan is working, make changes if something isn't working, or adjust the plan to meet a new need.



Your Care Manager...

gets to know you, your strengths and abilities, and learns what goals the Family Care program will help you achieve. Care Managers match you with services in the community that will be part of the care plan.



Your Registered Nurse...

works with the Care Manager and you to develop the care plan focusing on identifying potential health concerns or needed healthcare providers. The nurse is the key contact for health-related issues.



Am I Eligible to Join?

To see if you're eligible, contact your local ADRC. They will determine if you:



Live in the Family Care service area

Family Care is offered in all Wisconsin counties. Care Wisconsin's Family Care is available in 44 counties.



Meet age & disability requirements

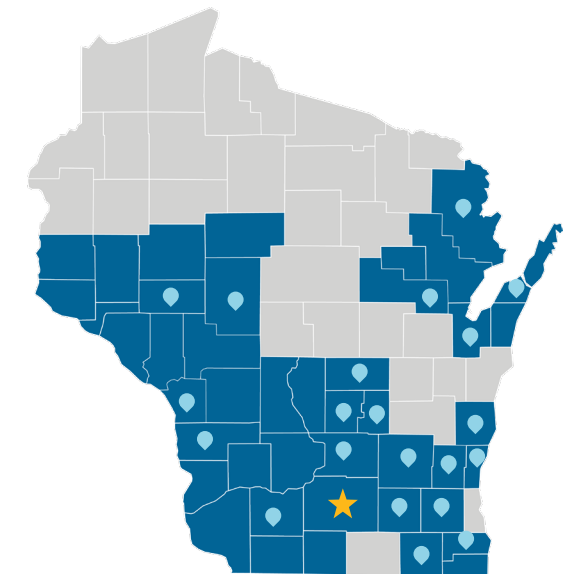
- 18 or older with physical disabilities
- 18 or older with intellectual or developmental disabilities
- Frail adults, age 65 or older



Other factors that are considered

- Income and asset limits
- Functional screen results

Care Wisconsin has 22 local offices across the state





Competitive Integrated Employment



Our Philosophy



All people want to feel connected to their communities and engage in meaningful work. Members of Care Wisconsin are no different. Through our Integrated Employment Program, our members can do just that!

The Benefits



People who work experience a higher quality of life. Through work opportunities, people develop self-confidence and form relationships that put them on a path to better physical and mental health.

Care Team



Our Care Teams support members in reaching their Competitive Integrated Employment goals. They make sure that members' unique skills and interests are matched to employment options in the community.

Learn More About Competitive Integrated Employment Today!

”

This works for me because I have the support of my boss, my guardian & my care team.

-Angie, Real Member



”

I love interacting with people, working with guests & making them happy.

-Nate, Real Member



Contact

Toll-Free: (800) 963-0035

TTY Relay 711

To learn more visit:

www.carewisc.org/member-employment

Interpreter and translation services are available free of charge. This document may be available in other forms upon request. If you have special needs, please call 1 (800) 963-0035 for help.

Equal Opportunity Employer.

Exhibit 2

Glen Grove Apartments Housing Plan for Tenants with Special Needs

Memorandum of Understanding

This memorandum of understanding is an understanding between Dane County Department of Human Services Children's Long-Term Support Program and Movin' Out, Inc. (Movin' Out), the affordable rental housing provider, represents the agreement of the two parties on the delivery of housing and services that will enhance independent living success and promote the dignity and independence of the tenants receiving supportive services.

Services Offered:

1. Movin' Out will reserve up to 20 of 100 units of the residential rental units in its Glen Grove Apartment development in the Village of Cottage Grove, Wisconsin for tenant households that include at least one child with disabilities who relies on supportive services coordinated and funded by Dane County Department of Human Services Children's Long-Term Support Program. Movin' Out commits to accommodate the delivery of supportive services for the life of the project.
2. The initial pool of tenants for up to 20 of the units will be families with children with, developmental, physical, or severe emotional disabilities who are clients of Dane County Department of Human Services Children's Long-Term Support Service, live in Dane County and who are referred by Dane County Department of Human Services Children's Long-Term Support Program. Final determination of who will be selected as initial tenants will be made by Movin' Out or the professional property management company designated by Movin' Out, with recommendations from Dane County Department of Human Services Children's Long-Term Support Program staff or their contracted direct service providers.
3. Movin' Out will provide services and amenities to meet the following needs of tenants with children who rely on supportive services:
 - a. Tenants with children with disabilities need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable, subject to compliance with lease terms.
 - b. Tenants with children with disabilities 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 the sources of development funding assure continuous affordability for qualified tenants in 100 units, 20 of which will be supported housing units.
 - c. Tenants with children with disabilities need disability-sensitive property management. Movin' Out's property management is tailored to tenants whose disabilities may require individualized accommodations. Property management will coordinate with and complement day to day supportive services.

- d. Tenants with children with disabilities need ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens. Movin' Out will develop housing units built to accommodate the 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.
4. Dane County Department of Human Services Children's Long-Term Support Program will provide comprehensive case management based upon individual family's children's assessed needs.
- a. Tenants with children with disabilities may need individualized in-home support services available on a regularly scheduled basis and/or on short notice. Dane County Department of Human Services Children's Long-Term Support Program contracts with providers to support the identified and assessed needs of each individual member. Services that may be supported by Dane County Department of Human Services Children's Long-Term Support Program include needed respite for parents as well as support, available in tenants' homes, to teach or maintain good nutrition, hygiene and health, 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, help in figuring out how to get to school and social destinations using public transportation, and coordination of domestic routines and schedules to insure people get to school, appointments, and other commitments on time and prepared.
5. Dane County Department of Human Services Children's Long-Term Support Program will coordinate providers to assist families with meeting their child's assessed needs. The tenants with children designated for supportive services will have individualized plans. Services are determined based on the needs and desires of the family and their support team. Families have the right to direct their own services as appropriate, including choosing their caregivers and service providers. For the purpose of this project, prospective resident children served by Dane County will be provided supports as identified in their individualized plan. These supports may include: respite, daily living skills, consumer education, training for unpaid caregivers (parents) and community integration services. All CLTS children have a support and service coordinator (case manager) who coordinates their plan and works with them to access the services they need.

How Services will be Planned and Funded

The proposed tenants may receive community-based supportive services for their child funded and coordinated by Dane County Department of Human Services Children's Long-Term Support Program based upon individual needs. Each tenant's child has a case manager who assists the tenant in creating

an individualized plan, accessing and coordinating needed supports based upon the child's identified needs and desired outcomes. The Dane County Department of Human Services

For Dane County Department of Human Services

Children's Long-Term Support Program:

For Movin' Out, Inc.:

Monica Bear
Dane County Community Services manager
- Disability Services

6-25-19
Date

Kathryne Auerback
Kathryne Auerback, Executive Director

7-10-19
Date

Intellectual and Developmental Disabilities

Children's Long-Term Support

Wisconsin's Children's Long-Term Support (CLTS) Waiver Program (including the Katie Beckett Program and the Children's Community Options Program) makes Medicaid funding available to support children with substantial limitations due to developmental, physical, or severe emotional disabilities who are living at home or in the community. Funding can be used to support a range of services based on an assessment of the needs of the child and his or her family.

The CLTS waiver is available to children and youth under the age of 22 who have a diagnosis of an intellectual and/or developmental disability, physical disability, and/or mental health disability. To receive services in Dane County, a child must be living in Dane County and be eligible for Medicaid. A child/youth must also be found eligible by meeting a level of care that is typically provided in a setting such as a hospital, nursing home, or institution for people with developmental disabilities. A screening tool known as the Functional Screen is used to determine a person's level of care.

There are a broad range of services offered through the CLTS Waiver Program to meet the needs and goals of your child and your family. Each plan is individualized and a CLTS case manager will work with children and their families to identify needs and goals that will help a child be an active participant in their home and community. In addition to a case manager some examples of possible services include:

- Adaptive aids
- Communication aids
- Daily living skills training
- Respite
- Home modifications
- Supportive home care

Dane County contracts with [CompassWisconsin: Threshold](#) to provide a unified point for intake, application, and eligibility determination for Wisconsin's CLTS programs. To speak with one of Dane County's CompassWisconsin: Threshold consultants, please call [\(608\) 288-9808](tel:6082889808).

After CompassWisconsin: Threshold completes their assessment, including the functional screen; the State of Wisconsin Department of Health Services will review the screen and eligibility and then send you a letter confirming if your child is eligible. Your child's eligibility information will also be sent to Dane County Human Services, who in turn will assign your child to a CLTS case management agency. In addition to Dane County Human Services CLTS unit, the county contracts with two additional agencies that provide a CLTS case management services. A CLTS Case Manager will reach out to the parents or guardian directly to start the process of receiving CLTS waiver services and supports.

04/15/2019

IDD
General Information
Services
Birth to 3 Program
Children's Long-Term Support
Key Phone Numbers

Exhibit 3

Glen Grove Apartments Housing Plan for Tenants with Special Needs

Memorandum of Understanding

This memorandum of understanding is an understanding between Dane County Department of Human Services Adult Mental Health Services and Movin' Out, Inc. (Movin' Out), the affordable rental housing provider, represents the agreement of the two parties on the delivery of housing and services that will enhance independent living success and promote the dignity and independence of the tenants receiving supportive services.

Services Offered:

1. Movin' Out will reserve up to 20 of 100 units of the residential rental units in its Glen Grove Apartment development in the Village of Cottage Grove, Wisconsin for tenant households that include at least one tenant with disabilities who relies on supportive services coordinated and funded by Dane County Department of Human Services Adult Mental Health Services. Movin' Out commits to accommodate the delivery of supportive services for the life of the project.
2. The initial pool of tenants for up to 20 of the units will be people with mental and behavioral disabilities who are clients of Dane County Department of Human Services Adult Mental Health Services, live in Dane County and who are referred by Dane County Department of Human Services Adult Mental Health Services. Final determination of who will be selected as initial tenants will be made by Movin' Out or the professional property management company designated by Movin' Out, with recommendations from Dane County Department of Human Services Adult Mental Health Services staff or their contracted direct service providers.
3. Movin' Out will provide services and amenities to meet the following needs of tenants who rely on supportive services:
 - a. Tenants with disabilities need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable, subject to compliance with lease terms.
 - b. Tenants with disabilities 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 the sources of development funding assure continuous affordability for qualified tenants in 100 units, 20 of which will be supported housing units.
 - c. Tenants with disabilities need disability-sensitive property management. Movin' Out's property management is tailored to tenants whose disabilities may require individualized accommodations. Property management will coordinate with and complement day to day supportive services.
 - d. Tenants with disabilities need ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens. Movin' Out will develop housing units

built to accommodate the 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.

4. Dane County Department of Human Services Adult Mental Health Services will provide comprehensive case management based upon individual tenant's assessed needs.
 - a. Tenants with disabilities may need individualized in-home support services available on a regularly scheduled basis and/or on short notice. Dane County Department of Human Services Adult Mental Health Services contracts with providers to support the identified and assessed needs of each individual member. Services that may be supported by Dane County Department of Human Services Adult Mental Health Services include 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.

5. Dane County Department of Human Services Adult Mental Health Services will coordinate providers to assist members with meeting their assessed needs. The tenants designated for supportive services will have individualized 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 services as appropriate, including choosing their caregivers and service providers. For the purpose of this project, prospective residents will be provided supports as identified in their individualized plan. These supports may include:
 - a. Financial Management : Dane County Department of Human Services Adult Mental Health Services will assess needs, preference, and aptitudes for increasing economic self-sufficiency. Dane County Department of Human Services Adult Mental Health Services members may be eligible for vocational services. Employment and career counseling may provide planning assistance in achieving employment by connecting enrolled members to community resources, providing career exploration, and performing informational interviewing with professionals and employers. Vocational services can address barriers to employment by connecting tenants to a Benefits Specialist who will explain how employment will affect benefits and what work incentives are available. Financial literacy training may be available to increase understanding and build good practices in handling money and credit.
 - b. Self-Directed Services : Autonomy and Choice: providers chosen by tenants can ensure that individuals have choice about where and with whom they live, how personal time is used and what services are received.

- c. Relationships/Community Involvement: the supportive services provider can assist with opportunities to develop and maintain relationships with friends, family and community members. Individuals will have opportunities to participate in community life and may receive support to help in coordinating plans, help with maintaining relationships with friends and neighbors, and/or the coordination of transportation, as needed, to get to the right place at the right time.
- d. Organization/communication: the supportive services provider staff may work cooperatively with individuals to plan and organize daily routines, including coordinating transportation, special events, communicating as needed with other service providers, care management team, and family members.
- e. Medication assistance and medical advocacy: Staff may assist each person, as needed, with medication administration, ensuring accuracy and consistency of needed medications. Staff can also attend medical appointments to assist individuals with communicating with medical providers and advocating on their behalf. Staff can work with the individuals and their teams to ensure medical appointments are attended, when necessary, and that any medical issues that arise are attended to promptly and appropriately. Staff can monitor the need for follow up appointments and maintain documentation of medical history.
- f. Home maintenance: Staff may assist, to the degree necessary, with home maintenance including cleaning all areas of the apartments, organizing, laundry, and maintaining a safe home environment.
- g. Meal Planning/Groceries: The supportive services provider may assist with meal planning, nutrition education and grocery shopping for each individual, as needed. This may include planning weekly menus, making grocery store lists, providing transportation to the grocery store and assistance with purchasing groceries. Supportive services may also include education and/or guidance around special dietary requirements (e.g., diabetic diet) and healthy eating.

How Services will be Planned and Funded

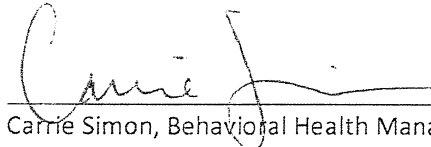
The proposed tenants may receive community-based supportive services funded and coordinated by Dane County Department of Human Services Adult Mental Health Services based upon individual needs. Each tenant has a Dane County Department of Human Services Adult Mental Health Services case manager who assists the tenant in creating an individualized plan based upon identified needs and desired outcomes. The Dane County Department of Human Services Adult Mental Health Services staff and identifies service providers will monitor and document the quality of supports delivered.

The Aging and Disability Resource Center of Dane County will offer prospective tenants with disabilities a central source of information, assistance and access to community resources for older people and people with disabilities, as well as their families. Personalized assistance is available at the resource center, over the telephone, or in visits to an individual's home.

Professional staff will assist adults to sort through options and make informed decisions.

For Dane County Department of Human Services

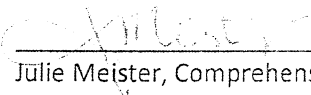
Adult Mental Health Services:



Carrie Simon, Behavioral Health Manager

6/25/19

Date

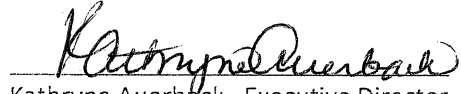


Julie Meister, Comprehensive Community Services Manager

6/27/19

Date

For Movin' Out, Inc.:



Kathryne Auerback, Executive Director

7-10-19

Date

Comprehensive Community Services (CCS)

Comprehensive Community Services, or CCS, is a program that provides mental health and substance use services to people of all ages. The intent of CCS services is to assist people in identifying their personal goals and in working towards those goals at their own pace. In the CCS program ***you are in charge of your own recovery.***

Who is Eligible for CCS?

CCS is available to adults and children who meet the following criteria:

- Dane County resident
- Eligible for Medical Assistance, BadgerCare, or another Medicaid program
- Have a mental health and/or substance use diagnosis
- Have a need for psychosocial rehabilitation services
- Eligible as determined by a Wisconsin Functional Screen

What Can I Expect?

Intake

You will talk with a CCS Intake Worker at Dane County Department of Human Services to discuss whether CCS is right for you. The Intake Worker will verify your insurance, assist you with obtaining a doctor's prescription for CCS services, and complete an interview with you to ensure that you are eligible for CCS. If you qualify for CCS Services and decide that CCS is right for you, the Intake Worker will help you connect with a Service Facilitator.

Recovery Team

You and your Service Facilitator will work together to assess your strengths and needs. You and your Service Facilitator will also assemble a Recovery Team made up of people you identify and trust. Your Recovery Team will help you develop a recovery plan that outlines *your* goals on *your* path to recovery. Your Recovery Team will offer encouragement and problem solving assistance.

On any journey, we must find out where we are before we can plan the first step.

-Kathy Boevink

CCS Services

Once you have developed a Recovery Plan in collaboration with your Recovery Team, your Service Facilitator will assist you with identifying the service providers you would like to enlist to provide the services you need. In many instances you will have the ability to choose from several available service providers. If you choose a provider and later would like a different provider, you can make that request. . . it is up to you!

Growth is never by mere chance; It is the result of forces working together.

*- James Cash Penney
Founder JCPenney stores*

You may remain in CCS as long as you continue to meet the eligibility criteria and are working on your recovery goals. You can decide to withdraw from the CCS program at any time.

CCS Values

CCS embraces many core values in its approach to the delivery of mental health and substance use services. CCS values include:

- Respect of client values—what is important to you?
- Inclusion of natural supports and family—who is important to you?
- Flexibility of services—what you need, when you need it.
- Community—services will be provided where you need and want them.
- Respect of client choice—it's up to you!

How do I apply for CCS?

To obtain more information or apply for Comprehensive Community Services, please call Dane County Department of Human Services CCS Intake Workers:

CCS Services for Youth (under 18):
(608) 283-1400

CCS Services for Adults (18 or older):
(608) 242-6415

This brochure is also available in Spanish and Hmong. We will provide an interpreter if necessary.

Este folleto también está disponible en español y Hmong. Proporcionaremos un intérprete si es necesario.

Daim ntawv qhia no tseem muaj Mev thiab Hmoob. Peb yuav muab ib tug neeg txhais lus yog tias tsim nyog.

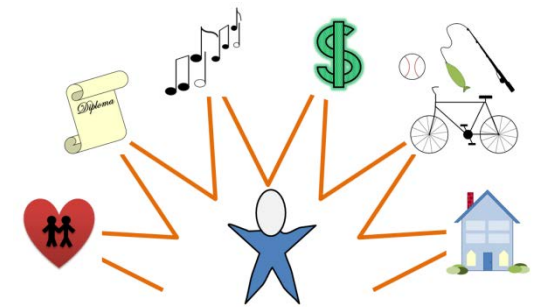
24-Hour Crisis Services

If you are experiencing a mental health crisis, Journey Mental Health Center provides 24-hour crisis services to all residents regardless of insurance.

Contact Information:
(608) 280-2600

January 2017

Comprehensive Community Services



**Your vision, your plan,
your recovery!**

*1202 Northport Drive
Madison WI 53704
608-242-6415 (adults)
608-283-1400 (youth)
www.danecountyhumanservices.org*



Exhibit 4

MEMORANDUM OF UNDERSTANDING

THIS MEMORANDUM OF UNDERSTANDING (the "MOU") is made this 20th day June of, 2019 (the "Effective Date"), by and between the Dane County Veterans Service Office, and Movin' Out, Inc. ("Developer").

WITNESSETH

WHEREAS, the Developer is the developer/owner of the subject proposed 100-unit development named Glen Grove Apartments to be located at 505 Cottage Grove Road, Cottage Grove, WI.

WHEREAS, the Dane County Veterans Service Office is an organization which assists eligible veterans and their dependents in applying for state and federal veterans' benefits, and whose mission is to serve all veterans and their families, with dignity and compassion, by providing assistance in the preparation and submission of claims for benefits to which they may be entitled, and to serve as their principal advocate and link to services on veterans' related issues.

WHEREAS, the intent of this Memorandum is to confirm our mutual desire and commitment to initiate a collaborative relationship to ensure eligible veterans are aware of the availability of affordable housing units in this development, and establish communication to connect future low income residents with appropriate services and service providers.

WHEREAS, the Developer is seeking financial support from the Wisconsin Housing and Economic Development Authority through the Section 42 Low Income Housing Tax Credit Program (LIHTC).

WHEREAS, anticipating that the application will be well received by WHEDA, and hopeful that it will receive funding that will allow construction of the community, the Developer wishes to proactively establish an area referral network that includes the Dane County Veterans Service Office.

NOW THEREFORE, Developer and the Dane County Veterans Service Office agree:

- 1) The proposed project intends to provide 20 supportive housing units at rents affordable to those earning 30% of the area median income. The target population for the supportive housing units is veterans and the general population who have permanent developmental, physical, sensory, medical or mental health disabilities or a combination of impairments that make them eligible for long term care services.
- 2) Should the proposed project be developed, Developer and/or its property management agent will, during lease-up and whenever there is a vacant unit, contact your office and other area local partners asking for referrals of prospective residents who are low income and are veterans. This contact will be made by the Developer or their onsite management agent staff via email or phone.

- 3) The Developer's property management agent will establish a waiting list of prospective residents based on referrals described above.
- 4) The Developer and its property management agent will endeavor to make existing and prospective residents aware of services and resources available by provision of a tenant resource area within the common area of the proposed development. The tenant resource area will consist of contact information for the Dane County Veterans Service Office well as materials and brochures of the Dane County Aging and Disability Resource Center (ADRC), and other area collaborative partners. New residents will also receive a copy of the Dane County Veterans Service Office and ADRC brochure directly from the property manager at the time of lease signing. Our onsite management agent staff will be coached regarding "who and how" with regards to the Dane County Veterans Service Office and the ADRC to help connect residents to appropriate service networks.
- 5) The proposed project will not provide long term services, nor charge fees related to long term services to residents, but will rather refer residents who may be veterans to the Dane County Veterans Service Office in order to assist residents to locate the services and funding appropriate to their individual need.
- 6) Residents will not be required to receive any services in order to reside in the development. Residents that desire to receive services will have choice in service provider(s).
- 7) The Dane County Veterans Service Office acknowledges awareness of this proposed project, and a willingness to provide the Developer and their agents with brochures and other materials in order for Developer to make residents aware of services offered by the Dane County Veterans Service Office.

Administrative Provisions

Duration

This MOU is subject to the project receiving an award of LIHTC, with operations expected to commence on or about July 1, 2021. The initial period shall be 12 months from commencement of leasing operations. Either party may terminate this agreement with 30 days' notice at the end of the initial period.

Amendments

This MOU may be amended when such an amendment is agreed to in writing by all signatories. The amendment will be effective on the date a copy is signed by all parties.

Confidentiality

It is agreed that by virtue of entering into this MOU they will have access to certain confidential information regarding the other party's operations related to this project. It is further agreed that the parties will not at any time disclose confidential information and/or material without the consent of that party unless such disclosure is authorized by this MOU or required by law. Unauthorized disclosure of confidential information shall be considered a material breach of this MOU. Where appropriate, client releases will be secured before confidential client information is exchanged. Confidential client information will be handled with the utmost discretion and judgment.

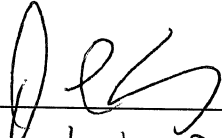
Nondiscrimination


There shall be no discrimination of any person or group of persons on account of race, color, creed, religion, sex, marital status, sexual orientation, age, handicap, ancestry, or national origin in the operation of the project.

Signatories:

Dane County Veterans Service Office

Movin' Out, Inc.

By:  _____
Date: 6/20/2019

By:  _____
Date: 7-12-19

Name: DANIEL A. CONNERLY
Title: VETERANS SERVICE
DIRECTOR

Name: Kathryn Auerback
Title: Executive Director

Programs and Services

The following list describes the programs and services that the Dane County Veterans Service Office can help provide for veterans. For more information on programs or services, call (608) 266-4158 or come to one of our locations (<http://www.danevets.com/locations.aspx>).

For help with finding employment, see our [Jobs for Veterans \(jobs.aspx\)](#) section.

Recently Discharged Veterans

- Recording DD-214's – Contact staff at the Dane County Veterans Service Office ([contact.aspx](#))
- VA Health Care Enrollment/Dental Care Enrollment (<http://www.va.gov/healthbenefits/apply/>)
- SGLI conversion (<https://insurance.va.gov/sglisite/SGLI/SGLI.htm>)
- Establish Eligibility for State of WI Benefits (http://www.dva.state.wi.us/Ben_eligibility.asp)
- eBenefits (<https://www.ebenefits.va.gov/ebenefits-portal/ebenefits.portal>)

Education Benefits

- Montgomery GI Bill (http://www.gibill.va.gov/benefits/montgomery_gibill/index.html)
- Post- 9/11 GI Bill (http://www.gibill.va.gov/benefits/post_911_gibill/index.html)
- Job Retraining Grant (<http://www.dva.state.wi.us/Ben-RetrainingGrants.asp>)
- VetEd (http://www.dva.state.wi.us/Ben_VetEd.asp)
- Wisconsin GI Bill (http://www.dva.state.wi.us/Ben_education.asp#WIGI)

Health Benefits

- My HealtheVet (<http://www.myhealth.va.gov/index.html>)
- **VA Medical Care**
- Assistance to Needy Veterans (http://www.dva.state.wi.us/Ben_emergencygrants.asp)
- TRICARE (<http://tricare.mil/mybenefit/home>)
- CHAMPVA (<http://www.va.gov/hac/forbeneficiaries/champva/champva.asp>)

Financial Assistance

- For Information on Financial Assistance for Local Veterans, please contact the Dane County Veterans Service Office ([contact.aspx](#))

Seniors

Disabled Vets

- Compensation Claims (https://www.ebenefits.va.gov/ebenefits-portal/ebenefits.portal?_nfpb=true&_portlet.async=false&_pageLabel=ebenefits_mye)
- Filing Appeals (<http://www.bva.va.gov/docs/Pamphlets/010202A.pdf>)
- VA Non Service-Connected Pension (<http://www.vba.va.gov/bln/21/pension/index.htm>)
- VA Vocational Rehabilitation & Employment Program (<http://www.vba.va.gov/bln/vre/>)
- VOW to Hire Heroes Act (<http://benefits.va.gov/VOW/index.htm>)

Home Buying

- VA Guaranteed Loans (<http://www.benefits.va.gov/homeloans/>)

In Time of Death

- Dependency & Indemnity Compensation (<http://www.vba.va.gov/bln/21/pension/spousepen.htm#9>)
- Death Pension (<http://www.vba.va.gov/bln/21/pension/spousepen.htm#1>)
- Burial Allowance (http://www.vba.va.gov/VBA/benefits/factsheets/burials/Burial_)
- Burial Markers (http://www.cem.va.gov/hm_hm.asp)
- Survivors Benefits (<http://www.vba.va.gov/Survivors/>)
- Burial Flag (<http://www.cem.va.gov/cem/bbene/bflags.asp>)
- Government Life Insurance (<https://insurance.va.gov/miscellaneous/index.htm>)
- Presidential Memorial Certificate (<http://www.cem.va.gov/cem/pmc.asp>)
- Flagholders – Contact staff at the Dane County Veterans Service Office ([contact.aspx](#))
- **Burial Information/Assistance with:**
 - State of Wisconsin Cemeteries (<http://www.dva.state.wi.us/Cemeteries.asp>)
 - Forest Hill Cemetery (Soldier Section) (http://www.cem.va.gov/CEM/cems/lots/forest_hill.asp)

Other Services

- Veterans Home at King and Union Grove
(<http://www.dva.state.wi.us/Homes.asp>)
- VA Non Service-Connected Pension with Aid & Attendance
(<http://www.vba.va.gov/bln/21/Pension/vetpen.htm#9>)
- For information on the following services, please contact staff at the Dane County Veterans Service Office ([contact.aspx](http://www.danevets.com/documents/pdf/RideWithPride))
 - Obtaining military awards
 - Obtaining military records
 - Providing grave-care payments
 - Speaking to organizations
 - Home and hospital visits
 - Outreach to prisoners
 - Pre-death advisement
 - Grave registrations
 - Liaison among vets groups
 - VAP – Veterans Assistance Program for homeless veterans
 - Vets Ride with Pride
(<http://www.danevets.com/documents/pdf/RideWithPride>
(commuter program))
 - Veterans Treatment Court
(<https://www.countyofdane.com/court/alternative/veteran>)

More Information

- US Department of Veterans Affairs – Benefits Information
(<http://www.vba.va.gov/VBA/benefits/factsheets/index.asp>)
- Wisconsin Department of Veterans Affairs
(<http://dva.state.wi.us/default.asp>)



Every child deserves a home

July 15, 2019

Megan Schuetz
Movin' Out, Inc.
902 Royster Oaks Drive
Suite 105
Madison, WI 53714

RE: Glen Grove – 505 W. Cottage Grove Rd., Cottage Grove, WI

Dear Megan,

Thank you for taking the time to meet with us recently to discuss a potential partnership opportunities. The Road Home Dane County is committed to working together on the above noted development. The Road Home intends to work with Movin' Out to provide referrals for up to five units at Glen Grove. The Road Home works with families experiencing homelessness and, in addition, with families where one family member has a disability. The referrals that we provide for Glen Grove will be families from the community housing priority list where one family member has a disability. This aligns with both of our missions.

The Road Home will also ensure access to supportive services for all families it refers to Glen Grove. It should be noted that there are multiple agencies in the Homeless Services Consortium of Dane County and we all work together to ensure families and individuals have access to services that best fit their needs. The Road Home directly provides some of these services and can also works as a service coordinator to link people to other appropriate providers in our network.

We look forward to working with Movin' Out on this development.

Sincerely,

A handwritten signature in black ink, appearing to read "KRISTIN RUCINSKI".

Kristin Rucinski
Executive Director



SECTION 5 – REQUIRED FORMS – ATTACHMENT A

VENDOR INFORMATION	
VENDOR NAME:	Movin' Out, Inc.

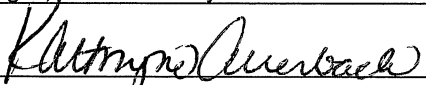
Vendor Information (address below will be used to confirm Local Vendor Preference)			
Address	902 Royster Oaks Drive		
City	Madison	County	Dane
State	WI	Zip+4	53714-9101
Vendor Rep. Name	Megan Schuetz	Title	Real Estate Developer
Email	ms@movin-out.org	Telephone	608-229-6910
Dane County Vendor #	5470		

Fair Labor Practice Certification (check only 1)	
<input checked="" type="checkbox"/>	Vendor has not been found by the National Labor Relations Board (“NLRB”) or the Wisconsin Employment Relations Commission (“WERC”) to have violated any statute or regulation regarding labor standards or relations in the seven years prior to the date this bid submission is signed.
<input type="checkbox"/>	Vendor has been found by the National Labor Relations Board (“NLRB”) or the Wisconsin Employment Relations Commission (“WERC”) to have violated any statute or regulation regarding labor standards or relations in the seven years prior to the date this bid submission is signed.

Local Vendor Purchasing Preference	
Are you claiming a local purchasing preference under DCO 25.08(7)?	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes (complete remainder of this section)
Preference as a Dane County Business:	<input checked="" type="checkbox"/> Dane
Preference as a business located in a county adjacent to Dane County:	<input type="checkbox"/> Columbia <input type="checkbox"/> Sauk <input type="checkbox"/> Iowa <input type="checkbox"/> Green <input type="checkbox"/> Dodge <input type="checkbox"/> Rock <input type="checkbox"/> Jefferson

Cooperative Purchasing	
<input type="checkbox"/>	I <u>agree</u> to furnish the commodities or services of this bid to other municipalities.
<input checked="" type="checkbox"/>	I <u>do not agree</u> to furnish the commodities or services of this bid to other municipalities.

Addendums – this vendor hereby acknowledges receipt/review of the following addendums, if any.				
Addendum #1 <input type="checkbox"/>	Addendum #2 <input type="checkbox"/>	Addendum #3 <input type="checkbox"/>	Addendum #4 <input type="checkbox"/>	None <input type="checkbox"/>

Signature Affidavit			
<p>In signing this bid, we 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 bid; that this bid has been independently arrived at without collusion with any other bidder, competitor or potential competitor; that this bid has not been knowingly disclosed prior to the opening of bids to any other bidder or competitor; that the above statement is accurate under penalty of perjury.</p> <p>The undersigned agrees to hold the County harmless for any damages arising out of the release of any material unless they are specifically identified on Attachment B. The undersigned, submitting this bid, hereby agrees with all the terms, conditions, and specifications required by the County in this Request for Bid, and declares that the attached bid and pricing are in conformity therewith.</p>			
Signature		Title	Executive Director
Name (Printed)	Kathryne Auerback	Date	July 10, 2019

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION
--

The attached material submitted in response to this Proposal 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 proposal response be treated as confidential material and not be released without our written approval. Attach additional sheets if needed.

Section	Page #	Topic

Proposer is not designating any information as proprietary and confidential which qualifies as trade secret.

Prices always become public information when proposals 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, proposer hereby agrees to provide legal counsel or other necessary assistance to defend the Designation of Confidentiality.

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

SECTION 5 – REQUIRED FORM – ATTACHMENT C

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:	WHEDA
STREET ADDRESS:	201 W. Washington Ave., Suite 700
CITY, STATE, ZIP	Madison, WI 53703
CONTACT PERSON:	Sean O'Brien EMAIL: sean.obrien@wheda.com
PHONE #:	608-267-1453 FAX #:
Product(s) and/or Service(s) Used:	LIHTC and construction/first mortgage financing
NAME OF FIRM:	Baker Tilly
STREET ADDRESS:	Ten Terrace Court
CITY, STATE, ZIP	Madison, WI 53718
CONTACT PERSON:	Don Bernards EMAIL: donald.bernards@bakertilly.com
PHONE #:	608-240-2643 FAX #:
Product(s) and/or Service(s) Used:	Consulting and Accounting services on affordable multifamily housing
NAME OF FIRM:	General Capital Group
STREET ADDRESS:	6938 N. Santa Monica Blvd.
CITY, STATE, ZIP	Fox Point, WI 53217
CONTACT PERSON:	David Weiss EMAIL: david@generalcapitalgroup.com
PHONE #:	414-228-3501 FAX #:
Product(s) and/or Service(s) Used:	Development/GC Partner