

## DANE COUNTY APPLICATION FOR 2021 AFFORDABLE HOUSING DEVELOPMENT FUND

This application should be used for project seeking Dane County AHDF funds. Applications must be submitted electronically to DCDHS Division of Housing Access by **noon on August 4, 2021**. Upload application materials to the **Dane County AHDF Dropbox**.

### APPLICATION SUMMARY


<b>ORGANIZATION NAME</b>	Northpointe Development II Corporation		
<b>MAILING ADDRESS</b> <small>If P.O. Box, include Street Address on second line</small>	230 Ohio Street, STE 200 Oshkosh WI 54902		
<b>TELEPHONE</b>	920-379-1645	<b>LEGAL STATUS</b>	
<b>FAX NUMBER</b>		<input type="checkbox"/> Private, Non-Profit <input checked="" type="checkbox"/> Private, For Profit <input type="checkbox"/> Other: LLC, LLP, Sole Proprietor	
<b>NAME CHIEF ADMIN/ CONTACT</b>	Cal Schultz	Federal EIN: <u>85-1243046</u> DUNS Number: 117563720	
<b>INTERNET WEBSITE (if applicable)</b>	Northpointedev.com		
<b>E-MAIL ADDRESS</b>	Cal@northpointedev.com		

**PROJECT NAME:** Please list the project for which you are applying.

PROJECT NAME	PROJECT CONTACT PERSON	PHONE NUMBER	E-MAIL
Broadway Lofts	Sean O'Brien	608-334-5665	Sean@northpointedev.com

**FUNDS REQUESTED:** Please list the amount and source of funding for which you are applying.

TOTAL PROJECT COST	AMOUNT OF AHDF FUNDS REQUESTES	PERCENT OF AHDF FUNDS TO TOTAL PROJECT COST
\$18,704,608	\$1,250,000	6.68%

 <hr/> Signature of Chief Elected Official/Organization Head  Cal Schultz	<hr/> President Title  08/02/2021
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# PROJECT DESCRIPTION

- A. **PROJECT NAME AND LOCATION:** Indicate the name, address, and census tract where the project will be located. Attach maps to the application indicating the location of the proposed project.

Project Name:	Broadway Lofts and Townhomes
Project Address:	1208 E. Broadway St
City, State, Zip:	Monona, Wi 53716
Parcel Number:	071028121805 & 071028122102
Census Tract:	105.01

- B. **JURISDICTION:** Indicate the name of the jurisdiction where the project will be located, i.e., City, Town, or Village. Is the jurisdiction supportive of the project? Describe any meetings that have been held with municipal staff, applicable municipal committees, and neighborhood/community groups.

The project is in the City of Monona. Northpointe recently put the site under contract and we've had preliminary discussions with some Council, Plan Commission, Chamber members as well as City staff.

- C. **ZONING:** Provide the current zoning classifications of the site and describe any changes in zoning, variances, special or conditional use permits, or other items that are needed to develop this proposal. Indicate if the project is consistent with any local comprehensive plans.

The site is currently zoned Community Design District and could be approved under current zoning as housing is consistent with the zoning code and comprehensive plan. However, it is likely that the project will request a rezone to the Planned Development which requires a two-step process included a General Plan approval and a Specific Plan Approval.

- D. **PROJECT DESCRIPTION:** Provide a detailed description of the project.

Northpointe Development Corporation and DreamLane Real Estate Group ("Developer") are proposing to construct the Broadway Lofts and townhomes, a newly constructed seventy-five unit 9% Low-Income Housing Tax Credit ("LIHTC") multifamily development located in the City of Monona, WI. The development will consist of the new construction of 2 total structures. One four-story elevatored building containing 29, one bedroom/one bathroom units, 30, two bedroom/two bathroom units and 4, three bedroom/ two bathroom units. The remaining Twelve (12) units will be located in one, 2-story townhome style building with first floor private entrances and all 12 townhomes will contain three bedrooms.

Northpointe proposes to set aside 59 of the units for residents earning 30-60 percent or less of the Dane County Area Median Income ("AMI") using the Wisconsin Housing and Economic Development Authority ("WHEDA") LIHTC Program. 60% of the total units will be set aside for households earning 50% AMI or less with 20% of the total units set aside for households earning 30% AMI or less. 14 units will be set aside for households earning 60% of AMI or less and 16 units will not be rent restricted.

Monona has very few buildable sites for new multifamily and the City has seen a significant uptick in market rate apartments using those sites without any new affordable in many years. Monona has a top tier school district and is very well located in County's urban core area which allows residents access to most places in Dane County in less than 20 minutes. The site is located near

many retail jobs and has easy access to the Beltline, Interstate 90/94, and the Dutch Mills Park n' Ride.

The project will be built to Wisconsin Green Built Standards and will also receive an Energy Star New Construction/ EPA Indoor AirPlus Certification. We are planning to have a 75 KW PV Solar System on the roof of the building which would eliminate approximately 90% of the building's common area electrical usage. We intend to work with Focus on Energy and their Design Assistance program. The project will have high quality materials including LVT flooring and quartz countertops.

The subject development site is located on the eastern edge of Broadway Street in Monona, Wisconsin. More specifically, the site is located at 1208 East Broadway Street. Broadway is one of the main traveled thoroughfares in Monona due to its proximity to retail, medical, restaurants, and the Park N' Ride. The site will also be designed to connect to the neighboring developments future planned walking/biking paths as well.

The project will be rent restricted for a minimum of 35 years.

**E. TARGETED POPULATIONS:** Will the project serve any of the listed targeted populations? How many units will be targeted to designated populations?

Broadway Lofts will serve all the checked target populations below. 15 of the units will be set aside at 30% of county median income and will be targeted to homeless or households in need of supportive services to maintain housing. All households will be offered services by Lutheran Social Services. 9 of the 50% and 60% units will have preference to veteran households of which LSS will provide services to those households.

Yes	No	
✓	<input type="checkbox"/>	Chronically homeless, meaning those who are either: 1) an unaccompanied homeless individual with a disabling condition who has been continuously homeless for a year or more, or 2) an unaccompanied individual with a disabling condition who has had at least four episodes of homelessness the past three years. Disabling conditions include mental illness and alcohol and drug conditions
✓	<input type="checkbox"/>	Veterans experiencing homelessness
✓	<input type="checkbox"/>	Very low-income families and/or families experiencing homelessness.
	x	Persons with arrest and conviction records
✓	<input type="checkbox"/>	Individuals who are elderly
✓	<input type="checkbox"/>	Individuals with disabilities

**F. GREEN TECHNOLOGIES/SUSTAINABILITY** Indicate if the project will be pursuing any of the listed energy and sustainability standards. Submit certification of registration for any selected certification.

<input type="checkbox"/>	<a href="#">2020 Enterprise Green Communities Certification</a>
✓	<a href="#">ENERGY STAR Multifamily New Construction</a> and <a href="#">EPA Indoor airPLUS</a>
<input type="checkbox"/>	<a href="#">2020 Enterprise Green Communities Certification Plus</a>

<input type="checkbox"/>	<a href="#">Passive House (PHIUS)</a>
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G. **WORK PLAN WITH TIMELINE AND MILESTONES:** In the space below, provide a work plan for how the project will be organized, implemented, and administered. Include a timeline and accomplishments from initiation through project completion. Add in extra quarters as needed. Examples of milestones are: acquisition, bid packages released, bids awarded, site preparation, excavation, construction begins, substantial completion, certificate of occupancy, lease-up begins, etc.

ON OR BEFORE	MILESTONES
November 2021	General Development Plan approved by City of Monona
December 2021	Apply to WHEDA for 9% credits
April 2022	WHEDA Credit Awards Announced
June 2022	SIP approval by City of Monona and begin Construction Documents
August 2022	Construction Docs complete/ bid packages released
September 2022	Project closes and starts construction
June 2023	Lease- Up Begins
October 2023	Substantial completion/ C of O
Feb 2024	Sustaining Occupancy
September 2024	Permanent loan conversion

H. **UNITS** In the space below, please list each site (street address) and building where the work will be undertaken. For each address list the number of each units by size, income category, etc. Use additional pages as needed.

ADDRESS #1:		1208 East Broadway, Monona WI Building 1					Projected Monthly Unit, including Utilities				
% of County Median Income (CMI)	Total # of Units	# of Bedrooms					\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
		# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs					
≤30%											
40%											
50%	5				5				1340		
60%	1				1				1483		
<b>Affordable Sub-total</b>	6				6						
80%											
<b>Market</b>	6				6				1883		
<b>Total Units</b>	12				12		Notes:	tenant pays heat and electric			

\*40% = 31 to 40% CMI, 50%=41%-50% CMI, 60%=51-60% CMI, 80%=61-80% CMI, Market = ≥81%

ADDRESS #2:		1208 East Broadway, Monona WI Building 2					Projected Monthly Unit, including Utilities				
% of County Median Income (CMI)	Total # of Units	# of Bedrooms					\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
		# of Studios	# of 1 BRs	# of 2 BRs	# of 3 of BRs	# of 4+ BRs					
≤30%	15		13	2				580	696		
40%											

50%	25		9	12	4			966	1160	1340	
60%	13		5	8				1067	1283		
<b>Affordable Sub-total</b>	53		27	22	4						
80%											
<b>Market</b>	10		2	8				1232	1548		
<b>Total Units</b>	63		29	30	4		Notes:	tenants pay heat and electric			

\*40% = 31 to 40% CMI, 50%=41%-50% CMI, 60%=51-60% CMI, 80%=61-80% CMI, Market = ≥81%

I. **SITE AMENITIES:** Check all that apply.

<input type="checkbox"/>	Community Building, square feet:
<input checked="" type="checkbox"/>	Community Room, square feet: 2200 including exercise room
<input checked="" type="checkbox"/>	Garages, number: 12 and monthly rent: Included in rent
<input checked="" type="checkbox"/>	Surface parking, number: 73 and monthly rent: Included in rent
<input checked="" type="checkbox"/>	Underground parking, number 64 and monthly rent: 55

J. **OTHER SITE AMENITIES:** In the following space, describe the other site amenities for tenants and/or their guests.

One of the unique site amenities will be the walkout community room and patio located on the 4<sup>th</sup> floor of the apartment building which will offer great views of Lake Waubesa. The site will also have walking paths that surround the property, on-site storm water management and significant green space due the adjacent environmental corridor to the East of the property. The property is also surrounded by creeks and other nice water features. The townhome units will have a private garage and the apartment building will have underground parking. There will also be outdoor amenities including an outdoor patio with grilling station, fire pit, picnic area and large/ safe play area.

## LOCATION

K. **NEIGHBORHOOD AMENITIES:** Describe the neighborhood in which the project will be located noting access to social, recreational, educational, commercial, and health facilities and services and other municipal facilities and services.

The site is very well located with walking access to many restaurants, medical clinics, retail shops, hardware stores, grocery, etc. Many other social activities, schools, and recreational activities are just a short drive down Broadway. With all the retail, medical, hardware, and commercial options nearby there are a significant number of jobs in the area which would require no drivetime for access. However, the site is also very well located near the Dutch Mill Park N Ride and the Bellline that would allow residents to get most places in Dane County in under 20 minutes including easy access to Madison's East Side, the airport, and Downtown. The site is also a piece of a larger tract of land which will be seeing new mixed use with retail and market rate housing being built which will bring more of a residential feel to the area.

Identify the distance the following amenities are from the proposed site

Type of Amenities & Services	Name of Facility	Distance from Site
Full Service Grocery Store	Pick-n-Save	.4 mi
Public Elementary School	Henderson Elementary School	.5 mi
Public Middle School	Sennett Middle School	1 mi
Public High School	Monona Grove high School	1.7 mi
Job-Training Facility, Community College, or Continuing Education Programs	Latino Academy of Workforce Development	1.6 mi
Childcare	Monona Kindercare	.7 mi
Public Library	Monona Public Library	1.75 mi
Neighborhood or Community Center	Monona Community Center	1.75 mi
Full Service Medical Clinic or Hospital	Unitypoint Health Meriter Monona Clinic	.1 mi
Pharmacy	Pick-n-Save	.4 mi
Public Park or Hiking/Biking Trails	Ahuska Park	.4 mi
Banking	UW Credit Union	.4 mi
Retail	Broadway Rd & Monona Dr	.4 mi
Other (list the amenities)		

- L. **TRANSPORTATION:** Identify the travel time and cost via public transportation or public automobile from the neighborhood to places of employment providing a range of jobs for lower-income workers.

The site has a regularly scheduled bus stop right on Broadway which connects directly to 51 to the east & the beltline to the South. Madison metro charges \$28/month to low-income individuals for a bus pass and \$1/ ride for senior citizens. The site has easy access to 151 and the Beltline which allows tenants easy access to Madison, Sun Prairie, or Middleton job centers. However, Monona has the 4th most Jobs per capita of any Dane County community and no new construction family LIHTC properties have been developed recently. Monona is also home to many major retailers like Menards, Goodwill, Michaels, & multiple hotels to serve the Alliant Energy center & downtown Madison. Given its favorable central location, auto transportation will be less than \$1/day for those who will work anywhere in the area. Downtown Madison is approximately 6.9 miles away meaning it would cost about \$2.5 dollars in gas to get downtown and home daily. Additionally, many retailers, grocery, and amenities are within walking distance of the site.

## PROJECT APPROACH

- M. **PARTNERHIPS:** In the space below, provide information on any partnerships that have been or will be formed in order to ensure the success of the project.

DreamLane and Northpointe have teamed up to co-develop the project. DreamLane is an emerging Minority owned development firm building capacity in the affordable housing industry and Northpointe is an experience and established affordable housing development firm. Northpointe will own 51% and DreamLane will own 49% of the Broadway Lofts managing

member and both will have substantial involvement throughout the entire process including the 15-year compliance period.

We have an executed MOU- Attached- with Lutheran Social Services regarding supportive services. LSS will provide staff to not only coordinate but also provide services directly to tenants as well.

We also intend to work with the County's HSC, Monona Food Pantry, and Joining Forces for Families.

Broadway Lofts has also partnered with local Architects (Knothe and Bruce), Engineers (Vierbicher), GC (Krupp), Property Manager (Oakbrook), and Council (Reinhart). All have significant experience in the Dane County Market and LIHTC development.

- N. PARTNERING TO END HOMELESSNESS:** In the space below, indicate the project's willingness to partner with the Homeless Services Consortium and its housing placement system to end homelessness for individuals and /or families on the community by-name list. If project will not implement an HSC preference on any project units, indicate how the proposed project will forward the goal of ending homelessness without the HSC preference.

The project is willing to partner with HSC and its housing placement system to end homelessness. The project will also set aside units for families on the community by-name list. The 15 30% units will have a preference for homeless households. Depending on the level of services needed by households from the County List we expect to always house a minimum of 2 households at the property and connect those households to services of their choice through LSS.

Total # of Project Units	# of Units Targeted to Individuals/Families on HSC community by-name list	% of Units Targeted to Individuals/Families on HSC community by name list
75	15	20%

- O. FAIR TENANT SELECTION CRITERIA:** Will the project incorporate tenant selection criteria detailed below? Check all that apply, and attached copy of proposed tenant screening criteria for project.

General Screening Process – will not deny applicants based on the following:

Yes	No	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Lack of housing history
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Credit score
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations.
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Owing money to a prior landlord or negative rent payment history if the tenant's housing and utility costs were more than 50% of their monthly income.
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Owing money to a prior landlord or negative rent or utility payment history if applicant does one of the following: (1) establishes a regular record of repayment of the obligation; 2) signs up for automatic payment of rent to the housing provider; or (3) obtains a representative payee.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Wisconsin Circuit Court Access records;
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criminal activity, except: (i) a criminal conviction within the last two years for violent criminal activity or drug related criminal activity resulting in a criminal conviction, and (ii) if the program or project is federally assisted, criminal activity for which federal law currently requires denial. ( <i>Violent criminal activity</i> is defined in 24 C.F.R § 5.100 and means any criminal activity that has as one of its elements the use, attempted use, or threatened use of physical force substantial enough to cause, or be reasonably likely to cause, serious bodily injury or property damage. "Drug related criminal activity is defined in Wis. Stat. s. 704.17(3m)(a)(2). "Drug-related criminal activity" means criminal activity that involves the manufacture or distribution of a controlled substance. "Drug-related criminal activity" does not include the manufacture, possession, or use of a controlled substance that is prescribed by a physician for the use of by a disabled person, as defined in s. 100.264(1)(a), and manufactured by, used, by or in the possession of the disabled person or in the possession of the disabled person's personal care worker or other caregiver. )
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located.

Will the project incorporate the denial process detailed below?

Yes	No
<input type="checkbox"/>	<input checked="" type="checkbox"/>

	Prior to a denial based on a criminal record, the housing provider shall provide the applicant access to a copy of the criminal record at least five days prior to the in-person appeal meeting and an opportunity to dispute the accuracy and relevance of the report, which is already required of HUD assisted housing providers. See 24 C.F.R. § 982.553(d), which applies to public housing agencies administering the section 8 rent assistance program.
1.	Prior to a denial based on a criminal record, the housing provider shall provide the applicant the opportunity to exclude the culpable family member as a condition of admission of the remaining family members.
2.	Prior to a denial decision, the housing provider is encouraged to meet with the applicant to review their application and make an individualized determination of their eligibility, considering: (a) factors identified in the provider's own screening policies, (b) if applicable, federal regulations, and (c) whether the applicant has a disability that relates to concerns with their eligibility and an exception to the admissions rules, policies, practices, and services is necessary as a reasonable accommodation of the applicant's disability. In making a denial decision, the housing provider shall consider all relevant circumstances such as the seriousness of the case, the extent of participation or culpability of individual family members, mitigating circumstances related to the disability of a family member, and the effects of denial on other family members who were not involved in the action or failure.
3.	The property manager will base any denial on sufficient evidence. An arrest record or police incident report is not sufficient evidence. Uncorroborated hearsay is not sufficient evidence.
4.	Denial notices shall include the following: a) The reason for denial with details sufficient for the applicant to prepare a defense, including: i) The action or inaction forming the basis for the denial, ii) Who participated in the action or inaction, iii) When the action or inaction was committed, and



	<p>iv) The source(s) of information relied upon for the action or inaction.</p> <p>b) Notice of the applicant's right to a copy of their application file, which shall include all evidence upon which the denial decision was based.</p> <p>c) Notice of the applicant's right to copies of the property manager's screening criteria.</p> <p>d) Notice of the right to request an in-person appeal meeting on the denial decision by making a written request for a hearing within 45 days. The housing provider is not required to hold the unit open while the appeal is pending.</p> <p>e) Notice of the right to have an advocate present at the in-person appeal meeting and of the right to be represented by an attorney or other representative.</p> <p>f) Notice of the right to present evidence in support of their application, including, but not limited to evidence related to the applicant's completion or participation in a rehabilitation program, behavioral health treatment, or other supportive services.</p>
5.	If the applicant requests an in-person appeal meeting, the hearing will be conducted by a person who was not involved in or consulted in making the decision to deny the application nor a subordinate of such a person so involved.
6.	The in-person appeal meeting shall be scheduled within ten working days of the request, unless the applicant requests a later date.
7.	A written decision on the application shall be provided to the applicant within ten working days after the in-person appeal meeting.

P. **TENANCY ADDENDUM:** Will the project include the following provisions within all tenant leases or as an addendum to all tenant leases?

Yes	No
<input checked="" type="checkbox"/>	<input type="checkbox"/>

<b>a.</b>	<b>Security Deposits.</b> The amount of a security deposit shall not be more than one month's rent.
<b>b.</b>	<b>Late Fees and Other Fees.</b> Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent. Other penalty fees are prohibited. All other fees must be directly related to the cost for a specific amenity or service provided to the tenant and comply with all applicable laws.
<b>c.</b>	<b>Rights of Youth to Access Common Spaces.</b> Youth under the age of 18 are allow to use and enjoy common areas without supervision. This does not preclude reasonable rules in ensure the safety of children and youth.
<b>d.</b>	<b>Good Cause for Termination.</b> A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined in include the following: (i) a serious violation of the lease; (ii) repeated minor violations of the lease; or (iii) a refusal to re-certify program eligibility. Repeated means a pattern of minor violations, not isolated incidents. Termination notices and procedures shall comply with Chapter 704 of Wisconsin Statutes and federal law, when applicable. Written notice is required for non-renewal and shall include the specific grounds for non-renewal and the right of the tenant to request a meeting to discuss the non-renewal with the landlord or landlord's property management agent within fourteen (14) days of the notice. If requested, the landlord or property management agent will meet with the tenant to discuss the non-renewal, allow the tenant to respond to the alleged grounds for non-renewal, and pursue a mutually acceptable resolution.
<b>e.</b>	<b>Reasonable Guest Rules.</b> Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not

	<p>limited to the following: (1) Prior authorization of guests by the property management, unless the guest is staying for an extended period of time (e.g. more than 2 weeks); (2) Prohibition on overnight guests; (3) Requiring that the resident be with the guest at all times on the property. (4) Requiring guests to show ID unless requested by the tenant. (5) Subjecting caregivers, whether caring for a child or children, or an adult with disabilities, to limitations on the number of days for guests.</p> <p>Landlord may ban a person who is not a tenant from the rental premises if the person has committed violent criminal activity or drug related criminal activity at rental premises. No person shall be banned from the rental premises without the consent of the tenant unless the following have taken place:</p> <p>(1) A notice of the ban is issued to the tenant stating the:</p> <ul style="list-style-type: none"> <li>(a) name of the person banned,</li> <li>(b) grounds for the ban including, (i) the specific facts detailing the activity resulting in the ban; (ii) the source of the information relied upon in making the ban decision; and (iii) a copy of any criminal record reviewed when making the ban decision; and</li> <li>(c) the right of the tenant to have a meeting to dispute the proposed ban, discuss alternatives to the ban, and address any unintended consequences of the proposed ban.</li> </ul> <p>(2) If requested, a hearing on the ban has taken place to provide the tenant an opportunity to dispute the proposed ban, discuss alternatives of the ban, and address any unintended consequences of the proposed ban.</p> <p>A tenant may not invite or allow a banned person as a guest on the premises, provided the Landlord has followed the proper procedure and given notice to Tenant as set forth herein.</p> <p>A tenant who violates the guest policy may be given a written warning detailing the facts of the alleged violation. The written warning shall detail the violation, and warn the tenant that repeated violations may result in termination of tenancy. Tenants that repeatedly violate the guest policy, (e.g. three (3) or more violations within a twelve (12) month period) may be issued a notice of termination in accordance with state and federal law.</p> <p>Nothing in this policy limits a person's right to pursue a civil order for protection against another individual.</p>
<p><b>f.</b></p>	<p><b>Parking Policies.</b> Parking policies and practices must comply with applicable laws. Vehicles shall not be towed to a location that is more than 6 miles from the rental premises, unless there is not a towing company with a tow location available within 6 miles.</p>

**Q. SUPPORTIVE SERVICES PLAN:** Provide a detailed description of how supportive services will be secured for project tenants. Use the table below to provide details of how supportive services will be provided to tenants. The plan should note any differences between services targeted to units with the HSC preference and services that will be available building-wide. Attach a letter from the identified partner(s) confirming the details of the plan.

<p>Name of Supportive Services Partner, and number of staff dedicated to project:</p>	<p>Lutheran Social Services with have one part time staff dedicated to this project as well as a supervisor providing oversight.</p>
<p>Scope of Services provided to tenants and approaches supportive service partner will use to address needs of tenant population:</p>	<p>Lutheran Social Services will utilize wraparound a service coordination model where families residing at the property, including Veterans and persons with disabilities, will be given a single point of entry to accessing community and supportive services. An on-site coordinator will meet with individuals and families to complete an intake assessment and develop a strength-based, goal-oriented plan of care. The service coordinator will work with the tenant and their surrounding existing natural supports, to build a comprehensive team, to explore areas of need, and fill gaps in supports where identified.</p>
<p>Where tenants will access services. For examples will services be on-site at development in designated space or by referral to off-site community supports:</p>	<p>LSS Staff will have a confidential space at the apartment community where tenants and families can schedule appointments or drop in for support and services. The Service Coordinator is also available by phone and email when offsite, to provide additional supports as needed during business hours.</p>
<p>If services provided are referral to off-site community supports, please detail how tenants will receive information on supportive services that are available to them before and after needs arise:</p>	<p>LSS Staff will work with the household to identify strengths and needs through an assessment tool. Based on this information, as well as self-reported data, the Service Coordinator will provide detailed information on services the household may qualify for and how to access them. The Service Coordinator can assist in establishing points of contact and arranging service delivery.</p>
<p>The frequency of services provided and/or a proposed schedule of when services are available to tenants:</p>	<p>LSS staff will have consistent office hours which will be posted in several spots in the apartment complex, including the community room and other common areas. If tenants are unavailable during these times the Service Coordinator can be available for appointments or via phone.</p>
<p>How the supportive services partnership will be funded, including if the respondent is providing funding to support the partnership:</p>	<p>The property has committed to provide \$3,500 to LSS annually for services. We continue to have conversations with LSS to look for other avenues to obtain financial resources for our partner.</p>
<p>Relevant performance data that provides insight into the supportive service partner's experience serving the target tenant population, and the outcomes for their tenants. Metrics</p>	<p>LSS collects data on an ongoing basis utilizing our Evolv database. Currently LSS has 2700 residents enrolled in Service Coordination over 108 total housing sites. Within the last year LSS has provided 66,819 units of direct service and had 19,954 individual 1-1 interaction with 4017 individual</p>

<p>could include the number of individuals served in a related program in a year, housing retention rates for individuals served in that program, connections to employment, etc:</p>	<p>residents. Additionally, residents utilizing a LSS Service Coordinator have an average length of stay of 5.33 years compared to just 3.96 years for those who do not to receive services.</p>
<p>How the supportive services partner and the respondent will work together to ensure the best outcomes for tenants, such as housing retention:</p>	<p>Service Coordinator will also work with the Property Management team to identify alternative strategies to avoid a negative outcome with tenants. This would include identifying and coordinating natural and community supports to assist individuals in continuing placement in their residence.</p>

R. **SUPPORTIVE SERVICES:** Describe the experience and qualifications of the organization that will be providing supportive services.

Lutheran Social Services (LSS) has a strong history of providing wraparound service coordination and case management services to residents of housing complexes in numerous locations throughout Wisconsin and Upper Michigan. LSS also is recognized as a provider of choice in the state for partnering with development companies to develop affordable housing through the Low-Income Housing Tax Credit program (LIHTC).

Lutheran Social Services will utilize a wraparound service coordination model where residents will be given a single point of entry to accessing community services. An on-site service coordinator will meet with residents to complete an intake assessment and develop a strength-based plan of care. The LSS service coordinator will work with the residents to identify existing natural supports, such as other relatives and faith-based organizations, and other areas of potential needs to fill gaps in supports and build a supportive team.

## EXPERIENCE AND QUALIFICATIONS

- S. **EXPERIENCE AND QUALIFICATIONS:** Describe the experience and qualifications of your organization related to the development of multifamily housing for low-income households.

### Northpointe Development II Corporation

Northpointe Development II Corporation is a real estate development company created for the purpose of bringing revitalization and development to various neighborhoods in Wisconsin. Northpointe envisions vibrant communities that strengthen neighborhoods, enhance livelihoods, respond to the environment, and connect people and places. The company's mission is to provide sustainable housing for communities in a collaborative, honest, and transparent manner. Northpointe is highly regarded in the industry by both tax credit investors and state agencies like WHEDA as we are one of WHEDA's largest borrowers to date. Northpointe has had success in obtaining above market equity pricing and terms from investors on a variety of housing types.

Northpointe, as shown below, has developed new construction family and senior apartment housing, historic rehabilitation, and commercial properties throughout Wisconsin. The company has received numerous awards including: the 2013 Top Projects Award in Milwaukee, 2015 National Historic Preservation Award, 2014 runner-up for the prestigious J. Timothy Anderson National Award for Excellence, 2017 Wisconsin Trust for Historic Preservation Award, 2019 Remarkable Milwaukee Award and the 2019 Carolyn Kellogg Historic Preservation Award.

Northpointe Development II Corporation is owned by Cal Schultz, Andy Dumke, and Sean O'Brien. Cal Shultz and Andy Dumke have over 20 years of LIHTC housing experience and utilizing government funding sources to build or rehab quality affordable housing. Sean joined Northpointe in 2020, previously working for WHEDA for 15 years as the Director of Commercial Lending. In that role he led WHEDA's Commercial Lending activities as well as the LIHTC program. Sean is also a member of the Federal Home Loan Bank of Chicago Community Investment Advisory Council.

### Multi Family Developments

Project Name	Location	Units	Property Type
Rivers Senior Living	Oshkosh WI	60	New Construction
Bayshore Townhomes	Sparta WI	32	New Construction
Fair Acre Townhomes	Oshkosh WI	55	New Construction
Kenwood Senior Living	Ripon WI	24	New Construction
The Fountains of West Allis	West Allis WI	35	Acquisition/Rehab
Oconomowoc School Apts	Oconomowoc WI	55	Adaptive Reuse
Nicolet Townhomes	De Pere WI	60	New Construction
Anthem Luxury Living	Oshkosh WI	80	New Construction
Mercantile Lofts	Milwaukee WI	36	Adaptive Reuse
Shoe Factory Lofts	Milwaukee WI	55	Adaptive Reuse
The Rivers - Phase II-Senior Living	Oshkosh WI	40	New Construction
Woolen Mills Lofts	Appleton WI	60	Adaptive Reuse
Century Building	Milwaukee WI	44	Adaptive Reuse
Cranberry Woods Townhomes	Wisconsin Rapids WI	40	New Construction
Bayside Senior Apartments	Oconto WI	42	New Construction
Whispering Echoes Townhomes	Winneconne WI	28	New Construction
Regency Place Senior Living	Little Chute WI	40	New Construction

Under Construction			
Arbor Terrace Senior Living	Wisconsin Rapids WI	40	New Construction
City Center	Brillion WI	40	New Construction
Crescent Lofts	Appleton WI	69	Adaptive Reuse
The Limerick	Fitchburg, WI	127	New Construction
Awarded 2021 LIHTC			
The Waterford	McFarland, WI	49	New Construction
Uno's-Madison	Madison, WI	60	New Construction
Quentin Apartments	Palatine, IL	58	New Construction
Total Units		1,253	

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

- Certified Minority Owned Business Enterprise by the State of Wisconsin Department of Administration for Real Estate Sales, Investment, Development, and Consultation.
- Professional Real Estate Brokerage office helping individuals and organizations buy, sell, and invest in all types of properties including: single family, multifamily, vacant land, recreational land, commercial real estate and historic properties.
- Assisting clients to realize the value of real estate ownership/investment and strengthen the communities in which our clients live and work.
- Purchased, sold, invested, own or developed more than 25 million dollars of multi-family, light commercial, and single-family assets throughout Dane County, Milwaukee County, and their surrounding areas.
- 12 years of real estate and property management experience
- Perform on-site reviews of single family and multifamily properties to assess the conditions and risks to the purchaser.
- Negotiated loan and finance documents.
- Review and analyze financial audits and proformas.
- Assist in multifamily site selection, offer negotiations, land entitlements approvals.
- DreamLane's success can be attributed to my passion not only for real estate, but also to my intuition regarding the psychology and desire of home ownership, real estate investment and development. My business has grown successfully and consistently thanks to the repeat business of happy clients and the introductions to friends, family, and neighbors. I expect this trend in to continue as my business shifts even more into the market-rate, affordable, and senior housing sector(s) and diversify my business with my partnership with Northpointe Development
- Co-Developer with Northpointe on LIHTC awarded applications of Uno's Madison, The Waterford in McFarland, The Klassik in Verona.
- Fitchburg Planning Commission- Commissioner 2017-2020

**T. PROPERTY MANAGEMENT:** Describe the experience and qualifications of the organization that will be handling the ongoing property management.

Since 1987, Oakbrook has established itself as a leading real estate service provider in the Midwest. With over 240 dedicated associates, we proudly manage over 10 million square feet of space including 7,000 apartment homes. Our fully integrated real estate services include: Multi Family & Commercial Property Management, Brokerage & Investment Sales, Development and Construction Services, Facility Maintenance, Investment.

Oakbrook approaches each property not as an assignment, but with the perspective of an owner operating a distinct business. This level of dedication can be seen in everything we do: from the detailed reporting we provide to how we engage with our residents. Our team provides fully integrated support for Multifamily owners, associates, and residents.

**Accounting & Financial Reporting**

Weekly reports, monthly financial statements, annual budgeting, custom reports and other services help us communicate with our clients and drive informed management decisions.

**Affordable Housing Services**

Our affordable housing team provide guidance and support on issues including compliance, regulatory approvals, syndicator requirements, government financing, public housing, HUD, LIHTC, Section 8, Rural Development and preservation programs.

**Construction Management Services**

Project management, due diligence and consulting resources meet client needs for responsive and cost- effective execution of routine capital improvements and large-scale renovations.

**Education & Training**

Our Learning Management System (LMS) and specific job-training and soft skill courses provide on-site and corporate associates with the skills and professional development tools to be successful.

**HR & Recruiting**

Targeted recruiting efforts identify the area’s top talent, while a dedication to providing competitive compensation and career development opportunities help retain associates for the long-term.

**Marketing**

We drive traffic through property specific marketing efforts that are creative, authentic, relevant and effective. We endeavor to inspire and inform future residents about the lifestyle associated with living at our community, generating leases and enhancing revenue performance

**Property Maintenance**

Preventative, ongoing, and capital maintenance projects extend the life of critical building systems, build asset value, minimize long-term costs, and enhance resident satisfaction.

**Purchasing**

Our long-standing relationships with quality vendors and suppliers ensure access to reliable goods and services at competitive prices that accrue to the benefit of our clients.

**Resident Services**

We work in the “people-business,” and we pride ourselves on understanding our residents and delivering services that they genuinely value. Timeliness in addressing maintenance requests and a daily focus on maintaining a welcoming community all combine to provide a refreshingly attentive service experience for our residents.

**Vendor Management**

Processes for supplier screening, onboarding, management and evaluation ensures a high-quality vendor base, which helps reduce expenses and increase operational performance

If a Property Manager has yet to be identified, please describe how one will be selected.

N/A please see above

## PROJECT FINANCING

U. **BUDGET SUMMARY:** Indicate the sources and uses of all funds for this project.

The County requires that the developer defer 40% of the developer fee as a financing source. If the sources and uses for a project indicate that less than 40% of the developer fee has been deferred, the amount requested will be reduced by the difference between the percentage of the developer fee deferred and 40%

For example: Assume the developer fee is \$1,000,000 and \$350,000, or 35% of the fee is deferred. Also assume the request for county funding is \$500,000. The actual award would be reduced by \$50,000 and the project would receive an award of \$450,000, if selected.

SOURCE	AMOUNT	USES	AMOUNT
Federal LIHTC Equity	10,030,997	Land	1,400,000
WHEDA First Mortgage	6,751,000	New Construction	13,331,540
Dane County AHDF	1,250,000	Construction Contingency	666,577
Deferred Developer Fee	672,611	Soft Costs	1,253,910
		Developer Fee	1,575,000
		Operating & Lease reserves	477,581
TOTAL	18,704,608	TOTAL	18,704,608

V. Which of the identified sources have been secured?

None of the above have been secured to date.

W. If the project will be applying for tax credits, please indicate which applications will be submitted (e.g. 4%, 9%, senior), the proposed timeline for submittal.

We expect to apply for WHEDA 9% tax credits in December with awards being announced in April of 2022. Based on last year's scores we believe our site has a solid chance to receive resources from the 9% competition.

X. **FUNDS NEEDED:** In the space below, please describe why AHDF funds are needed to ensure the viability of this project.

We expect that the location of this project, albeit well located for access to jobs, public transportation, retail etc., will be very competitive for 9% credits. Our projected score is 217 which is 5 points higher than last year's cutoff score. The AHDF funds will help the project's competitiveness by leveraging WHEDA's tax credits in an environment of rising costs. Under WHEDA's current QAP- projects in Dane County with access to economic opportunity, good schools, and located in areas of higher median incomes do not score as competitively as they once did. The funds will give Broadway Lofts the best chance to move forward quickly once awarded by WHEDA bringing much needed affordable housing to Dane County expeditiously. The funds also assist in land costs for the placement of the housing as vacant land in these areas of Dane County are becoming more expensive with the Market Rate Housing boom. Lastly, without the County funds the level of quality, sustainability, and services would not be feasible for the project moving forward.



- Y. **OPERATING BUDGET:** Complete the 20-Year Operating Budget, identifying the income and expenses, use additional pages as necessary. An Excel file may be submitted in lieu of the Operating Budget provided that it contains all of the same column and row headers.

## **OPERATING BUDGET**

See attached PDF

Y. Operating Budget

**Broadway Lofts  
Monona, WI  
PROJECTED CASH FLOW**

Annual Income Increase	2.00%
Annual Expense Increase	3.00%

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
	Yr 1	YR 2	YR 3	YR 4	YR 5	YR 6	YR 7	YR 8	YR 9	YR 10	YR 11	YR 12	YR 13	YR 14	YR 15	YR 16	YR 17	YR 18	YR 19	YR 20
<b>INCOME</b>																				
Gross Potential Rent	952,656	971,709	991,143	1,010,966	1,031,185	1,051,809	1,072,845	1,094,302	1,116,188	1,138,512	1,161,282	1,184,508	1,208,198	1,232,362	1,257,009	1,282,150	1,307,793	1,333,948	1,360,627	1,387,840
Vacancy Loss	(66,686)	(68,020)	(69,380)	(70,768)	(72,183)	(73,627)	(75,099)	(76,601)	(78,133)	(79,696)	(81,290)	(82,916)	(84,574)	(86,265)	(87,991)	(89,751)	(91,546)	(93,376)	(95,244)	(97,149)
Other Income	43,933	44,812	45,708	46,622	47,554	48,506	49,476	50,465	51,475	52,504	53,554	54,625	55,718	56,832	57,969	59,128	60,311	61,517	62,747	64,002
<b>Total Income</b>	<b>929,903</b>	<b>948,501</b>	<b>967,471</b>	<b>986,821</b>	<b>1,006,557</b>	<b>1,026,688</b>	<b>1,047,222</b>	<b>1,068,166</b>	<b>1,089,530</b>	<b>1,111,320</b>	<b>1,133,547</b>	<b>1,156,217</b>	<b>1,179,342</b>	<b>1,202,929</b>	<b>1,226,987</b>	<b>1,251,527</b>	<b>1,276,558</b>	<b>1,302,089</b>	<b>1,328,130</b>	<b>1,354,693</b>
<b>EXPENSES</b>																				
Marketing	2,000	2,060	2,122	2,185	2,251	2,319	2,388	2,460	2,534	2,610	2,688	2,768	2,852	2,937	3,025	3,116	3,209	3,306	3,405	3,507
Payroll	60,000	61,800	63,654	65,564	67,531	69,556	71,643	73,792	76,006	78,286	80,635	83,054	85,546	88,112	90,755	93,478	96,282	99,171	102,146	105,210
Other Admin Costs	36,625	37,724	38,855	40,021	41,222	42,458	43,732	45,044	46,395	47,787	49,221	50,698	52,218	53,785	55,399	57,061	58,772	60,536	62,352	64,222
Management Fees	46,495	47,890	49,327	50,806	52,331	53,900	55,517	57,183	58,898	60,665	62,485	64,360	66,291	68,279	70,328	72,438	74,611	76,849	79,155	81,529
Utilities	42,500	43,775	45,088	46,441	47,834	49,269	50,747	52,270	53,838	55,453	57,116	58,830	60,595	62,413	64,285	66,214	68,200	70,246	72,353	74,524
Security	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Maintenance Expenses	48,925	50,393	51,905	53,462	55,066	56,717	58,419	60,172	61,977	63,836	65,751	67,724	69,755	71,848	74,003	76,224	78,510	80,866	83,292	85,790
Property Taxes	145,000	149,350	153,831	158,445	163,199	168,095	173,138	178,332	183,682	189,192	194,868	200,714	206,735	212,937	219,326	225,905	232,682	239,663	246,853	254,258
Insurance	24,000	24,720	25,462	26,225	27,012	27,823	28,657	29,517	30,402	31,315	32,254	33,222	34,218	35,245	36,302	37,391	38,513	39,668	40,858	42,084
Reserves for Replacements	22,500	23,175	23,870	24,586	25,324	26,084	26,866	27,672	28,502	29,357	30,238	31,145	32,080	33,042	34,033	35,054	36,106	37,189	38,305	39,454
<b>Total Operating Expenses</b>	<b>428,045</b>	<b>440,886</b>	<b>454,113</b>	<b>467,736</b>	<b>481,768</b>	<b>496,221</b>	<b>511,108</b>	<b>526,441</b>	<b>542,235</b>	<b>558,502</b>	<b>575,257</b>	<b>592,514</b>	<b>610,290</b>	<b>628,599</b>	<b>647,456</b>	<b>666,880</b>	<b>686,887</b>	<b>707,493</b>	<b>728,718</b>	<b>750,579</b>
<b>NET OPERATING INCOME</b>	<b>501,858</b>	<b>507,615</b>	<b>513,358</b>	<b>519,084</b>	<b>524,788</b>	<b>530,467</b>	<b>536,114</b>	<b>541,725</b>	<b>547,295</b>	<b>552,819</b>	<b>558,290</b>	<b>563,703</b>	<b>569,052</b>	<b>574,330</b>	<b>579,531</b>	<b>584,647</b>	<b>589,671</b>	<b>594,596</b>	<b>599,413</b>	<b>604,114</b>
Debt Service	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117	427,117
Asset Management fee	5,000	5,150	5,305	5,464	5,628	5,796	5,970	6,149	6,334	6,524	6,720	6,921	7,129	7,343	7,563	7,790	8,024	8,264	8,512	8,768
<b>Cash Flow</b>	<b>69,741</b>	<b>75,348</b>	<b>80,937</b>	<b>86,504</b>	<b>92,044</b>	<b>97,553</b>	<b>103,026</b>	<b>108,459</b>	<b>113,844</b>	<b>119,178</b>	<b>124,453</b>	<b>129,665</b>	<b>134,806</b>	<b>139,871</b>	<b>144,851</b>	<b>149,740</b>	<b>154,530</b>	<b>159,214</b>	<b>163,783</b>	<b>168,229</b>

F. [ENERGY STAR Multifamily New Construction](#) and [EPA Indoor airPLUS](#)

The “**Broadway Lofts**” development is registered with Energy Star and will be pursuing certifications for both Multifamily New Construction and EPA indoor airPLUS as listed in our AHDF application.

The screenshot shows the Energy Star Portfolio Manager interface for the 'Broadway Lofts' property. The header includes the Energy Star logo and navigation links like 'Welcome', 'Account', 'Notifications', 'ENERGY STAR', 'Contacts', 'Help', and 'Sign Out'. Below the header are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main content area displays the property name 'Broadway Lofts', its address '(Approx) 1220 E. Broadway, Monona, WI 53716', and other details like 'Portfolio Manager Property ID: 16866550' and 'Year Built: 2023'. A 'Weather Normalized Source EUI (kBtu/ft²)' widget shows 'Current: N/A' and 'Baseline: N/A'. A 'Metrics Summary' table lists various metrics, all of which are currently 'Not Available'. A 'Source EUI Trend' chart is also present but empty.

**ENERGY STAR® PortfolioManager®**

Welcome | Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out  
Northpointe1: Settings | Notifications

MyPortfolio | Sharing | Reporting | Recognition

**Broadway Lofts** [Change Metric](#)

(Approx) 1220 E. Broadway, Monona, WI 53716 | [Map](#)  
Portfolio Manager Property ID: 16866550  
Year Built: 2023  
[Edit](#)

**Weather Normalized Source EUI (kBtu/ft²)** [Why not score?](#)  
Current: N/A  
Baseline: N/A

Summary | Details | Energy | Water | Waste & Materials | Goals | Design

[Refresh](#) to see **Source EUI Trend** [Change Metric](#)

[Change Metrics](#)  
[Change Time Periods](#)

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Source EUI (kBtu/ft²)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Site EUI (kBtu/ft²)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Energy Cost (\$)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Total GHG Emissions Intensity (kgCO2e/ft²)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Water Use (All Water Sources) (kgal)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Total Waste (Disposed and Diverted) (Tons)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A



August 1, 2021

Sean O'Brien  
Northpointe Development  
2628 Saw Tooth Drive  
Fitchburg, WI 53711

RE: Broadway Lofts and Townhomes, Monona WI

Dear Mr. O'Brien,

This letter serves as evidence of Oakbrook Corporation's commitment to serve as the Property Management agent for the Broadway Lofts and Townhomes, a 75-unit affordable multifamily property located in Monona, WI. Northpointe Development plans to apply for competitive Housing Tax Credits in December of 2021. If awarded tax credits they plan to start construction in the Fall of 2022. Oakbrook has significant experience in managing high-quality affordable housing projects throughout Wisconsin and has partnered with Northpointe on similar developments to-date.

Oakbrook's role in this development will be to serve as the third-party Property Manager. Oakbrook 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. Oakbrook will market the property during construction and will manage all aspects of property management and programmatic compliance in the long term. This includes but is not limited to: establishing a tenant selection plan, waiting list, completing all aspects of the resident application process and resident screening, communicating with service providers assisting in supportive housing units, and maintaining the building.

Oakbrook further acknowledges that we are aware of and assisted Northpointe with the application's selections to Dane County's Fair Tenant Selection Criteria and have attached the Tenant Selection Plan for the property. We also are aware of Northpointe's commitment to Dane County's Tenancy Addendum as part of their funding application. We have reviewed specifics of the addendum and will include these requirements as part of the lease documents and house rules.

If there are any questions regarding Oakbrook's role as Property Manager or commitment to the County's requirements, please feel free to contact me.

Sincerely,

*Michael C. Morey*

Michael C. Morey  
Senior Vice President

# Tenant Selection Plan

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Broadway Lofts & Townhomes

August 1, 2021

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I. **Introduction**

a. **Development Description** – Broadway Lofts & Townhomes (“Development”) is a proposed 75-unit apartment community serving low-to-moderate income individuals that will be owned by Northpointe Development (“Owner”) and managed by Oakbrook Corporation (“Management”). The Owner and Management, on behalf of the Owner, subscribe to the following procedures in qualifying applicants for occupancy in this Development, which includes 59 units subject to the statutory and regulatory requirements of the Federal Low Income Housing Tax Credit program (“LIHTC”).

i. The LIHTC Requirements mean collectively, LIHTC of the Internal Revenue Code of 1986, as amended, 26 U.S.C. LIHTC, its implementing federal tax regulations set forth in 26 CFR Part 1.42, the Low Income Housing Tax Credit Extended Use Agreement between the Owner and the Wisconsin Housing & Economic Development Authority (“WHEDA”) for the Development, and all applicable IRS revenue rulings, revenue procedures, tax assistance memoranda, and related written guidance and notices.

b. **Tenant Type**

i. The Development is designated as housing for Families

1. Supportive Service Units – Fifteen (15) units at the Development are designated for Veterans, persons with disabilities, and those at risk of homelessness.

c. **Unit Distribution**

i. 15 units at up to 30% of the median income in Dane County, WI

ii. 30 units at up to 50% of the median income in Dane County, WI

iii. 14 units at up to 60% of the median income in Dane County, WI

iv. 16 market rate units

d. **Rent Structure** – Note that the tenant rent payment will not exceed the HUD annual published limits for the LIHTC program.

e. **Nondiscrimination Policies**

i. General: Federal civil rights laws addressing fair housing prohibit discrimination against applicants or tenants on the basis of race, color, national origin, sex, gender, age, disability, religion, and familial status. **Wisconsin** fair housing regulations prohibit discrimination against applicants or tenants for federally protected classes plus the following: sexual orientation, marital status, ancestry, lawful source of income, and victims of domestic abuse or other crimes. **Dane County fair housing regulations prohibit discrimination on the basis of federal and state protected classes plus the following: physical condition, mental illness, and handicap (including the right to service and companion animals), type of military discharge, physical appearance, gender identity and gender expression (including transgendered people), domestic partnership status, political beliefs, student status, and receipt of rental assistance.**

HUD’s Office of General Counsel issued a memo dated April 4, 2016, which is guidance concerning how the Fair Housing Act applies to the use of criminal history by providers or operators of housing and real-estate related transactions.

The Development is in compliance with this and other key federal civil rights laws regarding fair housing and accessibility as described below.

- ii. Fair Housing Act – The Development complies with Fair Housing Act Amendments of 1988 (“Fair Housing Act”) which prohibits discrimination in housing on the basis of race, color, religion, sex, disability, familial status, and national origin regardless of any federal financial assistance. Fair Housing Act obligations include:
  - 1. Management will not refuse, either directly or indirectly, to rent or negotiate for rental of a dwelling based on race, color, religion, sex, disability, familial status, and national origin.
  - 2. Management will not (i) engage in activities that steer potential tenants away from or toward particular units by words or actions, (ii) make housing units and related services unavailable to any potential tenants, (iii) purposely provide false information to applicants about the availability of units that limits the living options of prospective tenants, and (iv) deny or limit services based on race, color, religion, sex, disability, familial status, and national origin.
  - 3. Management will market available units in a nondiscriminatory manner.
  - 4. Management will make reasonable accommodations in rules, policies, practices, or services as may be necessary to afford handicapped persons equal opportunity to use and enjoy a dwelling.
- iii. Section 504 of the Rehabilitation Act of 1973 (Section 504) prohibits discrimination based upon disability in all programs or activities operated by recipients of federal financial assistance. Section 504 obligations include the following:
  - 1. Allowing for reasonable structural modifications (with prior approval and, in certain circumstances, at tenant’s expense) to units and/or common areas that are needed by applicants and tenants with disabilities, unless these modifications would change the fundamental nature of the project or result in undue financial and administrative burdens.
  - 2. Operating housing that is not segregated based upon disability or type of disability, unless authorized by federal statute or executive order.
  - 3. Providing auxiliary aids and services necessary for effective communication with persons with disabilities.
  - 4. Performing a self-evaluation of Management’s programs and policies to ensure that they do not discriminate based on disability.
  - 5. Developing a transition plan to ensure that structural changes are properly implemented to meet program accessibility requirements.
  - 6. Section 504 also establishes accessibility requirements for newly constructed or rehabilitated housing, including providing a minimum percentage of accessible units.
  - 7. In accordance with Section 504 of the Rehabilitation Act of 1973, accessible units are allocated using a special priority approach. When accessible units become available, the housing provider must offer the units in this order:
    - a. To current residents that would benefit from the available unit’s accessibility features, but whose current unit does not have such features
    - b. To eligible and qualified households on the Waiting List with disabilities who would benefit from the available unit’s accessibility features
    - c. To other eligible and qualified households on the Waiting List (i.e., without disabilities) which may require the household to agree, in



writing, to transfer to a non-accessible unit at the owner's request (the request will only be made if an accessible unit is not available to a person who requires the features of an accessible unit)

8. The Section 504 Coordinator for this property is:

Jennifer Foland  
Oakbrook Corporation  
2 Science Court  
Madison, WI 53701  
608-238-2600  
800-947-3529 TTY Relay

iv. Equal Access to Housing in HUD Programs Regardless of Sexual Orientation or Gender Identity:

1. Effective March 5, 2012, HUD implemented new regulations intended to ensure that HUD's core housing programs are open to all eligible persons regardless of actual or perceived sexual orientation, gender identity or marital status (HUD Notice 2015-01).
2. Owners and operators of HUD-assisted housing, or housing whose financing is insured by HUD, must make housing available without regard to sexual orientation, gender identity, or marital status.
3. All otherwise eligible households, regardless of marital status, sexual orientation, or gender identity, will have the opportunity to participate in HUD programs.
4. Owners and operators of HUD-assisted housing or housing insured by HUD are prohibited from asking about an applicant or occupant's sexual orientation and gender identity for the purpose of determining eligibility or otherwise making housing available.

v. Title VI of the Civil Rights Act of 1964: Prohibits all recipients of federal financial assistance from discriminating based on race, color, or national origin.

vi. Age Discrimination Act of 1975: Prohibits discrimination based upon age in federally assisted and funded programs, except in limited circumstances. It is not a violation of the Age Discrimination Act to use age as screening criteria in a particular program if age distinctions are permitted by statute for that program or if age distinctions are a factor necessary for the normal operation of the program or the achievement of a statutory objective of the program or activity.

vii. Executive Order 13166 – Limited English Proficiency: This Order requires Owner/Management to take reasonable steps to ensure meaningful access to the information and services they provide for persons with limited English proficiency. This may include interpreter services and/or written materials translated into other languages.

viii. Violence Against Women and Justice Department Reauthorization Act of 2005 & 2013 & Final Rule of 2016 ("VAWA"): VAWA protects victims of domestic violence, dating violence, sexual assault, or stalking, as well as their immediate family members generally, from being evicted or being denied housing assistance if an incident of violence is reported and confirmed.

1. Owner/Management responding to an incident of actual or threatened domestic violence, dating violence, sexual assault, or stalking that could potentially have an impact on a tenant's participation in the housing program  
Owner/Management:
  - a. May request in writing that an individual complete, sign and submit within 14 business days of the request, the HUD-approved certification form (HUD-91066).
  - b. In lieu of the certification form or in addition to it, Owner/Management may accept (i) a federal, state, tribal, territorial, or local police record or court record or (ii) documentation signed and attested to by a professional (employee, agent or volunteer of a victim service provider, an attorney, medical personnel, etc.) from whom the victim has sought assistance.
2. Owner/Management will keep all information related to incident(s) of domestic violence, dating violence, sexual assault, or stalking in a separate secure location from other tenant files, and will not be shared unless:
  - a. Individual's written consent is obtained;
  - b. Information is required for use in an eviction proceeding or termination or assistance; or
  - c. Otherwise required by law.
3. If a victim commits separate criminal activity, they may be evicted for engaging in crime. In addition, if a victim poses an actual and imminent threat to other tenants or those employed at, or providing service to, the property, they could be evicted. Management may evict residents submitting a false certification of domestic violence, dating violence, sexual assault, or stalking.
4. Management will remove, evict, and/or terminate assistance to an individual determined to be causing the abuse.

## II. **Preferences**

- a. **Establishing Preferences** – Preferences are not permitted if they in any way negate affirmative marketing efforts or fair housing obligations. The following preferences apply to the Development:
  - i. **Existing Tenant Preference**: The following actions are always given priority if applicable, and if not, State Mandated Preferences take precedence.
    1. A unit transfer for household seeking protections under VAWA
    2. A unit transfer based on the need for an accessible unit
    3. A unit transfer for a medical reason certified by a doctor
    4. A unit transfer of a non-handicapped individual living in a handicapped accessible unit to accommodate a handicapped applicant on the Waiting List
    5. A unit transfer for other reasons approved by Management
  - ii. **Supportive Housing Preference**: Preference will be given to veterans, persons with disabilities, and/or individuals at risk for homelessness for the 15 (fifteen) units set aside as supportive housing units.
  - iii. **State/Federal Mandated Preferences**: The Development must comply with any state or federal mandated preferences as described below:
    1. Displaced from an urban renewal area

2. Displaced as a result of a government action
3. Displaced as a result of a major disaster

iv. Optional Preferences: The Development does not have any optional preferences.

b. **Verification of Preferences** – The State/Federal Mandated Preferences will be verified by third party verification.

c. **Selection of Households for Participation**

- i. An eligible applicant who qualifies for a preference will receive housing before any other applicant who is not so qualified. These preferences take precedence over other applicants' place on the Waiting List, or date of submission of application.
- ii. Applicants will be informed of the availability of preferences and will be given an opportunity to certify that they qualify for a preference. Applicants may claim a preference at any time during the application process.

d. **When a Preference is Denied**

- i. If it is determined that an applicant does not meet the criteria for receiving a preference, the applicant will promptly receive a written notice of this determination from Management. The notice will contain a brief statement of the reasons for the determination, and state that the applicant has the right to meet with the Management's designee to review this decision. If the applicant requests a meeting, it will be conducted by a person or persons designated by Management.
- ii. Denial of a preference does not prevent the applicant from exercising any legal rights the applicant may have against Management and/or Owner.

e. **Exceptions to the Preference Rule**

- i. Relocation and/or Unit Transfers: Management must give priority to current households (i) when their units are designated for rehabilitation and/or (ii) for current households residing in a unit within the Development that has been designated as uninhabitable by federal, state, local municipalities or Management due to fire, flood, or other natural disaster.

III. **Pre-Application Processing** – Development will not use Preliminary Applications.

a. **Distribution of Information** – Information will be given to households who respond to the marketing efforts about the Development's preferences and will indicate that all applicants will be given an opportunity to show that they qualify for a preference.

- i. The information will state that those persons qualifying for a preference will receive housing before any other applicant who is not so qualified.

IV. **Waiting List Procedures**

a. **Creation of Waiting List** – If an applicant is eligible for tenancy but no appropriately sized unit is available (as referred to in Section VII Occupancy Standards), Management will place the applicant on the Waiting List for the Development. The Waiting List will be maintained electronically and in hard copy. Placement on the Waiting List does not guarantee occupancy; it merely means that these persons will be contacted in the future with detailed instructions on how to formally apply for residence at the Development. When names are placed on the Waiting List, persons will be informed that it is their responsibility to inform the Development's Management office of changes in mailing address, telephone number, email address, or TTY/TDD

number (if applicable). **A separate Waiting List will be maintained for the fifteen (15) units set aside as supportive housing units.**

**b. Changes in Income or Household Composition**

- i. When placed on the Waiting List, applicants will be informed to notify Management in writing if any changes to the following occur:
  - 1. Address and/or phone number
  - 2. Household composition
  - 3. Preference status
  - 4. Income

**V. The Screening (Interview) Process**

**a. Application Requirements**

The following information will be used to determine program eligibility for anyone who is seeking housing at the Development.

Live in aides, new household members, and police officers, security personnel or managers residing in units will be subject to same screening for drug abuse and other criminal activity applied to other applicants.

- i. Application – All adult household members must complete an application and sign the Authorization for Release of Information Form. Management shall accommodate persons with disabilities who, as a result of their disabilities, cannot utilize the Management’s preferred application process by providing alternative methods of taking applications.
  - ii. A credit report will be ordered and an application fee may be charged to cover the actual cost of this report.
  - iii. A criminal background search will be obtained including a search of a State and National sex offender registry. **On-site management personnel do not search or review Wisconsin Circuit Court Access records.**
  - iv. Verification of employment, income, bank accounts, and other assets is required as applicable for each applicant.
  - v. Current and previous housing for past two years is required. **A lack of housing history will not be used as the basis for denial of an application.**
- b. Completion of Application Process** – All applications will be processed within thirty days after the date of the applicant’s initial interview or within five business days of receipt of all required documentation, whichever is later (excluding weekends and designated federal holidays). Applications will be processed on a first come first served basis.
- c. Security Deposit Requirements** – a security deposit will be required at move-in and will be based on screening results, but in any event shall not be more than one (1) month’s rent.

**VI. Eligibility Requirements**

**a. Income** – The annual gross income of the applicant(s) must:

- i. Be equal to or less than the income limit established by the applicable program’s administrative rules for the appropriate household size; and
- ii. Meet the 40% rent to income threshold
  - 1. Adjustments to this policy may be made by Management depending upon a household’s total assets and access to public assistance (e.g., food stamps, energy assistance, etc.)

**2. If applicant cannot meet the minimum income requirement but can demonstrate the ability to comply with the rent obligation based on a rental history of paying an equivalent rent to income ratio for the prior 24 months, that condition shall be waived as a requirement for approval.**

- b. Sole Residence** – The unit must be the applicant’s sole residence in order for the applicant to be eligible for housing.
- c. Social Security Numbers** – Social security numbers for all U.S. citizens must be disclosed for all adult household members.
- d. Date of Birth** – Date of birth must be disclosed for all household members.
- e. Student Eligibility Requirements HOME (if applicable)** – HOME assisted units shall not be provided to any individual who:
  - i.** Is enrolled as either a part-time or full-time student at an institution of higher education, for the purposes of obtaining a degree, certificate, or other program leading to a recognized educational credential; and
  - ii.** Is under 24 years of age; and
  - iii.** Is not married; and
  - iv.** Is not a veteran of the United States Military; and
  - v.** Does not have a dependent child; and
  - vi.** Is not a person with disabilities and was not receiving section 8 assistance as of November 30, 2005; and
  - vii.** Is not living with his or her parents who are receiving Section 8 assistance; and
  - viii.** Is not individually eligible to receive Section 8 assistance or has parents (individually or jointly) who are not income eligible to receive Section 8 assistance. (Unless the student can demonstrate his or her independence from parents, the student must be eligible to receive Section 8 assistance and the parents (individually or jointly) must be eligible to receive Section 8 assistance in order for the tenant to be eligible.
- f. Student Eligibility Requirements LIHTC** – Households consisting entirely of full-time students (either currently or have been for five months of the current calendar year) do not qualify unless the household meets one of the following exceptions:
  - i.** All members of the household are married and are entitled to file a joint tax return.
  - ii.** The household consists of single parent(s) and their child (or children) and no one in the household is dependent of third party.
  - iii.** At least one member of the household receives assistance under Title IV of the Social Security Act (i.e. TANF).
  - iv.** At least one member of the household is participating in an officially sanctioned job training program.
  - v.** At least one member of the household was formerly in foster care.

**VII. Occupancy Standards**

- a.** The standards used at this development are:
    - i.** Maximum number of persons allowed in a 1BR unit is two (2) persons. The minimum number of persons required for a 1BR unit is one (1) person.
    - ii.** Maximum number of persons allowed in a 2BR unit is four (4) persons. The minimum number of persons required for a 2BR unit is one (1) person.
    - iii.** Maximum number of persons allowed in a 3BR unit is six (6) persons. The minimum number of persons required for a 3BR unit is two (2) persons.
- NOTE: Exceptions may be made on non-senior properties for minors under the age of two years old.

- b. The unit applied for must have enough space to accommodate the applicant's household.
- c. Management's occupancy standards comply with federal, state, and local fair housing and civil rights laws, landlord-tenant laws, and zoning restrictions.

**VIII. Rejection Criteria** – The ability of the applicant to fulfill lease obligations will be considered. In addition to verifying whether a household is income qualified and program eligible, Management will use various criteria in determining the acceptability of all applicants. An applicant may be rejected for one or more of the following reasons:

- a. **Insufficient/Inaccurate Information on Application** – refusing to cooperate fully in all aspects of the application process or supplying false information will be grounds for rejection.
- b. **Credit and Financial Standing**
  - i. Unsatisfactory history of meeting financial obligations (including, but not limited to timely payment of rent, outstanding judgments, or a history of late payment of bills) will be considered. If an applicant is rejected based on the credit report, they will be provided the name of the credit bureau that performed the credit. Management will not disclose the specifics of any information reported by the credit bureau. Applicants will be given the opportunity to correct or clear the adverse credit.
  - ii. The inability to verify credit references is a factor for rejection of an application. Consideration will be given for special circumstances in which credit has not been established.
- c. **Criminal Convictions/Current Drug Use**
  - i. Applicants who fall into the following categories will be rejected:
    1. Any household in which any member whose use of marijuana, or current addiction to or engagement in the illegal use of a controlled substance interferes with the health, safety, or right to peaceful enjoyment of the premises by other residents will be denied admission and, if an occupant, will be subject to termination of tenancy.
    2. Any household in which any member was evicted in the last three years from federally assisted housing for drug-related criminal activity. Exception: if the evicted household member has successfully completed an approved supervised drug rehabilitation or the circumstances leading to the eviction no longer exist (e.g., the household member no longer resides with the applicant household).
    3. Any household member that is subject to a state sex offender lifetime requirement.
    4. Any household member for whom there is reasonable cause to believe that the member's behavior, from abuse or pattern of abuse of alcohol, may interfere with the health, safety, and right to peaceful enjoyment by other residents. The screening standards must be based on behavior, not the condition of alcoholism or alcohol abuse.
    5. Any household member who has been convicted of the following felonies:
      - a. Homicide
      - b. Kidnapping/abduction
      - c. Forcible Sex
      - d. Arson
  - ii. Additional criminal history will be considered and may be the cause of rejection:
    1. Assault

2. Domestic abuse resulting in assault or battery charges unless applicant is a victim of domestic violence, dating violence, sexual assault, or stalking as defined by the Violence Against Women Act (VAWA)
  3. Weapons violations
  4. Other violent felonies not listed above
  5. Fugitive felon status or parole violations
  6. Theft, burglary, breaking and entering, fraud or larceny
  7. Vandalism exceeding \$1,000
  8. Disturbing the peace (repeat offender)
  9. Criminal trespass
  10. Other criminal behavior that would threaten the health, safety, or right to peaceful enjoyment of the premises by other residents or people who live in the immediate vicinity of the site or the health and safety of the owner, employees, contractors, subcontractors or agents of the owner.
- iii. Management will consider the criminal activity that occurred during the following periods:
1. Misdemeanors during the past seven-year period
  2. Gross misdemeanors during the past fifteen-year period
  3. Felonies (not listed as automatic rejections) during the past ten-year to thirty-year period
- d. **History of Residence**
- i. Management will consider whether the applicant or any other person who will be living in the unit, has a history of physical violence to persons or property, or has exhibited living habits at prior residences that could adversely affect the health, safety, and quiet enjoyment of other residents at the rental community. Management will consider all circumstance regarding this type of activity as well as the period during which it occurred.
- e. **Household Characteristics** – Household size or household characteristics were not appropriate for the specific type of unit available at the time of application.

**IX. Rejection Procedures**

- a. If Management rejects an application, a formal letter of rejection will be sent to the applicant at the address shown on the application unless otherwise notified. If the cause for rejection is due to an unfavorable credit history, the applicant will be notified of the credit reporting service, their address and telephone number for direct contact with the service. If it can be verified that the credit report is in error, the application will be re-processed, and, if accepted, the application will be prioritized according to the original application date. Management may not discuss credit-reporting information with the applicant.

**X. Special Occupancy Categories** – Applicants will be interviewed and processed as authorized in Sections V through VIII, with exceptions made as follows:

- a. **Persons with Disabilities**
  - i. An applicant with disabilities will be given priority for an accessible unit if such applicant deems that this type of unit is appropriate for their household.

- ii. If the household determines that the accessible unit is not appropriate for the household's needs, the household's name will be returned to its place on the Waiting List.



Lutheran Social Services (LSS) has a strong history of providing wraparound service coordination and case management services to residents of housing complexes in numerous locations throughout Wisconsin and Upper Michigan, and is recognized as a provider of choice in the state for partnering with development companies to develop supportive services within affordable housing.

Lutheran Social Services will utilize wraparound a service coordination model where families residing at Broadway Lofts Apartments and Townhomes, including Veterans and persons with disabilities, will be given a single point of entry to accessing community and supportive services. An on-site coordinator will meet with individuals and families to complete an intake assessment and develop a strength-based, goal oriented plan of care. The service coordinator will work with the tenant and their surrounding existing natural supports, to build a comprehensive team, to explore areas of need, and fill gaps in supports where identified.

#### **Scope of Services:**

LSS will provide wraparound service provision and coordination, linking residents to supportive community services with a desired outcome of keeping the tenant and family members in stable housing. Specific services offered by LSS include:

- Completion of an intake assessment to identify strengths as well as areas of need for individuals and families. The Service Coordinator will make reasonable effort to engage residents in this process. It is understood and agreed that the resident has to voluntarily agree to participate in the process.
- Development of a case management plan for residents completing the intake assessment. This plan may include referral to other resources, including services and resources specific to their needs. This will include linking residents with programs that support independence and self-sufficiency, access to benefits, employment opportunities and financial assistance and management.
- The LSS Wraparound Service Coordinator will facilitate programming and supportive services for families. This will be done through:
  - An onsite presence by the Service Coordinator. LSS Staff will have a confidential space at the apartment community where tenants and families can schedule appointments or drop in for support and services. The Service Coordinator is also available by phone and email when offsite, to provide additional supports as needed, during business hours.
  - Facilitation of educational presentations and workshops. These will be based on the needs of the residents and can focus on resident identified issues such as positive parenting, budgeting, employment, educational resources, and benefit eligibility.
  - Connection to existing LSS services in the Madison area, including but not limited to, mental health counseling and psychiatric care through telehealth.

In addition to providing families access to LSS services the onsite wraparound service coordinator will refer residents to other community resources based on their individual plan of care. Currently LSS is in the process of developing community partnerships with the following:

- State of Wisconsin Department of Workforce Development, in coordination with the Job Centers of Wisconsin, to provide subsidized part-time work experience to obtain the skills necessary for obtaining permanent employment.
- UW Extension Dane County will provide onsite trainings and educational events of no cost to families. Training topics could include:
  - Financial coaching and one to one consultations
  - Nutritional education programs on topics such as choosing healthy diets on a limited budget and shopping strategies for spending wisely at the grocery store

- Dane County Veteran Services who can assist veterans and their families with obtaining local, state and federal benefits. Veterans Services also could assist tenants with the application process.
- Wisconsin Women's Business Initiative Corporation (WWBIC) has partnered with LSS to provide group training and events that focus on assisting tenants with managing household finances and increasing financial capabilities.

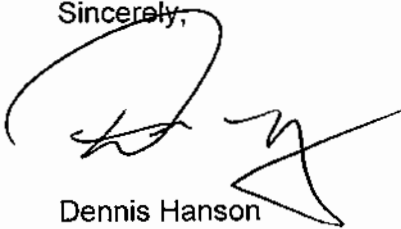
The goal of the Service Coordinator is to enhance the success of Veteran residents, and families experiencing homelessness, and to promote their independence and ability to remain in their unit. The services identified above with enhance independent living success and promote dignity of residents by addressing needs through a person specific approach.

LSS is a member and attends the Dane County Continuum of Care meetings, and currently operates several Rapid Rehousing programs in Dane County. In addition, LSS's currently operates three Veterans Housing and Recovery Programs within the state of Wisconsin, for homeless veterans to receive the job training, education, counseling and rehabilitative services they need to obtain steady employment, affordable housing and the skills to sustain a productive lifestyle. LSS provides wrap around Service Coordination at other sites in the Madison area, and are familiar with the supports in the community to serve Veterans and individuals and families experiencing homelessness.

In addition to services outlined above LSS will assist property management in outreach efforts with community partners to raise awareness of this unique opportunity for Veterans and families at risk or experiencing homelessness. LSS will work with the management company to market the low-income units to families in need.

We strongly believe that through provision of the wrap around service model, families at The Waterford will have the tools necessary to strengthen family relations, identify necessary and beneficial resources, and positively impact their length of tenancy in this community. We look forward to partnering with Northpointe Development on this exciting development.

Sincerely,



Dennis Hanson  
Vice President: Residential/Housing Services/Facility & Asset Management

**Memorandum of Understanding and Service/Marketing Plan  
For  
Broadway Lofts  
Monona, WI**

Lutheran Social Services (LSS) represents that it has substantial skill and experience in assisting organizations to provide social and case management services to residents of housing complexes in numerous locations throughout Wisconsin and Upper Michigan, including in Dane County.

**Scope of Services:**

LSS will provide Service Coordination services to low-income Veterans and families experiencing or at risk of homelessness, who require and request access to supportive services to maintain housing. The project will include 75 units, 15 low-income units with very low rents (30% CMI units) that can be offered to the target population. In addition, the project will include an additional 9 set aside units (50 and 60% CMI) that will target Veterans. A designated Service Coordinator will be responsible for linking the target population at the site with supportive, medical, or advocacy services in the general community for which they are entitled, with a desired outcome of keeping them independent in their units.

Specific services to be offered under this agreement include:

- Completion of an intake assessment for Veteran residents or families experiencing homelessness. The Service Coordinator will make reasonable effort to engage these residents in this process. It is understood and agreed that the tenant has to voluntarily agree to participation in the process.
- Development of a case management plan for Veterans or families experiencing homelessness, completing the intake assessment. This plan may include referral to other resources, including Veteran specific services and resources and supportive community services for families. Specific services will include linking residents with programs that support independence and self-sufficiency, employment opportunities and financial assistance and management.
- The Service Coordinator will facilitate programming and supportive services for the project. This will be done through:
  - o Monthly on site visits by the assigned Service Coordinator during the three month lease of phase and quarterly on site visits by the assigned Service Coordinator quarterly thereafter for the term of this agreement. An assigned service coordinator will also be available by telephone and email outside of the designated times above.
  - o Facilitation of an annual meeting where tenants and the management company can meet to discuss any issues or concerns.

The scheduling of quarterly educational services with an emphasis on presentations designed to assist Veteran residents and families experiencing homelessness in overcoming barriers as identified on the tenant assessments. Potential sessions include self-improvement, employment and educational opportunities and financial management, and developing relationships with the County Veterans Service Officer and the Center for Veterans Issues.

In addition LSS agrees to assist the property management group in outreach efforts with community partners to raise awareness of this unique opportunity with the target population. LSS will work with the management company to market the low-income units to the target population as able.

The goal of the Service Coordinator is to enhance the success of Veteran individuals, couples and families, and to promote their ability to remain in their unit. The services identified above will enhance independent living success and promote dignity of residents by addressing needs with a one-on-one approach.

Traditional service provision through LSS has long included services to Veterans and individuals at risk of homelessness. The Business Leadership Team of LSS has identified targeting and expanding services to Veterans as a need and priority. As a result of the above LSS has over three years' experience working with Veterans and homeless families. Current LSS programs known to include Veterans and at risk homeless populations as participants/service recipients include:

- HUD Housing and HUD Housing Service Coordination
- Off the Square Club- a daytime drop in center for people with serious and persistent mental illness as well as homelessness. Emotional support, vocational and recreational opportunities, and structuring of individual schedules are available.
- Veterans Housing and Recovery Programming - residential facilities for homeless veterans to receive the job training, education, counseling and rehabilitative services they need to obtain steady employment, affordable housing and the skills to sustain a productive lifestyle
- Dane County Rapid Rehousing Program - a program providing homeless families with rent assistance and supportive case management services
- Outpatient Treatment Services- intensive outpatient treatment for adults and adolescents dealing with addiction.
- Pre-marriage workshops

By signature below the parties hereby agree to the terms and conditions above.

NORTHPOINTE DEVELOPMENT

Sean OB Date 08/03/2021

LUTHERAN SOCIAL SERVICES

Dennis Hanson Date 8.3.2021