

**To:**

**Dane County Purchasing**

**Division**

**Attention: Carolyn A. Clow**

**Room 425 City-County Building**

**210 Martin Luther King Jr. Blvd.**

**Madison, WI 53703-3345**

**From:**

**Movin' Out, Inc.**

**902 Royster Oaks Drive**

**Suite 105**

**Madison, WI 53714-9101**

**Affordable Rental Housing**

**Affordable Housing Development Fund**

**#117037**

**Due 2:00 PM May 5, 2017**



Movin' Out

8<sup>th</sup>

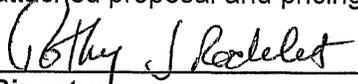
**STREET  
APARTMENTS  
STOUGHTON**

8<sup>th</sup>

<b>RFP COVER PAGE SIGNATURE AFFIDAVIT</b>	
<b>NAME OF FIRM:</b>	Movin' Out, Inc.
<b>STREET ADDRESS:</b>	902 Royster Oaks Drive, Suite 105
<b>CITY, STATE, ZIP</b>	Madison, Si 53714
<b>CONTACT PERSON:</b>	Dave Porterfield
<b>PHONE #:</b>	(608) 251-4446 ext. 8
<b>FAX #:</b>	(608) 819-0623
<b>EMAIL:</b>	<u>dp@movin-out.org</u>

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

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

  
Signature

Executive Director  
Title

Timothy Radelet  
Name (type or print)

5-1-17  
Date

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

Addendum # \_\_\_\_\_ Addendum # \_\_\_\_\_ Addendum # \_\_\_\_\_ Addendum # \_\_\_\_\_

**TAB 1**  
**Introduction**

## **8th Street APARTMENTS**

8th Street Apartments will be a newly constructed a 59-unit affordable multifamily housing community developed in the City of Stoughton within the Riverfront Redevelopment Area which is two blocks South of Stoughton's Main Street. The Riverfront Redevelopment Area is a 10+ acre former industrial site which the City of Stoughton has slated for redevelopment. The balance of this site will be developed by another company and will include a mix of uses including commercial/retail, market-rate housing and public open space. 8th Street Apartments will include a total of 59 units consisting of 12 one-bedroom, 39 two-bedroom and 8 three-bedroom units (16% of total unit).

Twenty percent of the units (12 units) will have rents affordable to households earning below 30% of county median income and will be marketed to low income tenants who either have a permanent disability or are military veterans. Those tenants will be provided with access to supportive services provided either by Dane County Department of Human Services (or their successors) contracted service providers or Veterans Services providing agencies as appropriate. All services provided will be voluntary on the part of the tenant and will be paid by third parties so the project operating budget does not include any supportive services costs.

8th Street Apartments is a joint venture between Movin' Out, Inc. a statewide nonprofit housing agency and General Capital Group, a for profit multifamily developer which focuses on affordable housing development projects. This project represents the fourth joint venture as partners. The project will be owned by a yet to be formed LLC that will have at a minimum two members, an investor member and a managing member. The managing member will be a second LLC with Movin' Out as its sole members. This is a typical tax credit ownership structure.

**TAB 2**

**Development and Service Team  
Background**

# Development and Service Team Background

**Movin' Out and General Capital's Experience in Obtaining Section 42 Tax credits; participating in public/private joint ventures, developing multi-family housing for low-income households and developing permanent supportive housing.**

Both Movin' Out and its co-development partner General Capital Group as well as the other team members described in this section have extensive experience in securing and utilizing Section 42 Tax Credits and financially structuring this type of project successfully. Our team has the full skill set required to plan, close, construct and then own and operate affordable multi-family housing of this type as evidenced by the list of successful projects listed below. All multi-family projects Movin' Out is involved with include integrated supported housing units which we have extensive experience with. This project represents the fourth joint venture with Movin' Out and General Capital. This is the second project this team has undertaken in Stoughton. Our initial project, Elven Sted has been a very successful project and located across the street from this proposed project.

Movin' Out and General Capital have assembled a highly qualified development team to plan, develop, construct and manage 8th Street Apartments. Based on our highly successful Elven Sted project across the street, most of the team members which participated in that project are included in this proposal. Movin' Out will be the Lead Developer and will partner with General Capital as our co-developer and their subsidiary Bedrock Construction as General Contractor. This same partnership platform was used for Elven Sted and we expect the same high quality outcome for this project.

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



## Movin' Out

**Movin' Out, Inc.** - *Lead Developer*. Movin' Out will lead the overall development effort and serve as the primary point of contact on the project. The firm's responsibilities include overall project coordination and implementation, providing long term financial guarantees, assembling required financing, obtaining all required zoning and building approvals, serving as the managing member of the ownership LLC (owner) and overseeing the ongoing property management of the completed project.

Movin' Out has 20 years of experience in the area helping low income families with the purchase of a home or attaining permanent affordable rental housing solutions. Movin' Out works in close partnership with human service systems to ensure that households who need supportive services to be successful in their homes have a commitment for those services, as part of their housing plan. Movin' Out is using this approach in the planning for 8th Street Apartments.

During the past 20 years Movin' Out has assisted over 1,200 low-income households to purchase homes statewide in Wisconsin. Additionally, during the past eight years Movin' Out has developed and now owns and operates or has under development 240 units of affordable rental units in five Wisconsin counties. Movin' Out also served as a project sponsor in two large scale housing development projects with another nonprofit resulting in the development of 40 section 42 rental units and 126 mixed income single family and condominium units. Movin' Out participated in the planning of these projects, provided capital subsidies for the development of the units; provided housing counseling to prospective tenants and home owners and provided down payment assistance to many of the home owners in those projects.

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

Tim Radelet, the executive director of Movin' Out has a distinguished career on real estate law and affordable housing finance. He left his post as Wisconsin Housing and Economic Development Authority (WHEDA) general counsel last year to take the leadership position at Movin' Out. Radelet was a partner at the Foley & Lardner law firm where he specialized in complex affordable housing transactions. He earned his law degree from the University of Wisconsin Law School and brings over 309 years of

focused experience in real estate development and finance with long-established relationships with most of the top real estate development and management companies and nonprofits in Wisconsin.

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

- **Globe Apartments- Watertown, WI**
  - *11 units of supported housing integrated into a 48-unit section 42 tax credit project located in downtown Watertown, WI. Movin' Out carried out this project in partnership with Mirus Partners and Horizon Development and Construction.*
- **Pinney Lane - Madison, WI**
  - *18 units of supported housing as part of a 70 mixed income, mixed use section 42 project carried out as a joint venture with ACC Development on the near East side of the City of Madison as part of a 28 acre redevelopment on a former brownfield called Royster Crossing.*
- **Monroe Street Apartments - Waterloo, WI**
  - *8 units of supported housing integrated into a 24 unit mixed income section 42 project carried out as a joint venture with Mirus Partners located in the downtown of Waterloo, WI in Jefferson County.*
- **Pioneer Ridge - Wisconsin Dells, WI**
  - *18 units of supported housing integrated into a 72 unit mixed income section 42 financed projects located on Northeast section of Wisconsin Dells. This project is a joint venture with Mirus Partners.*
- **Maple Grove Commons - Madison, WI**
  - *20 units of supported housing integrated into a 78 unit mixed income section 42 financed projects located on McKee Road in Southwest Madison as a joint venture with Oakbrook Corporation.*
- **Madison and Main- Waunakee, WI**
  - *10 units of supported housing integrated into a newly constructed 78 unit market rate mixed use project in downtown Waunakee, WI. Movin' Out partnered with CBH, LLC a partnership of local business people from Waunakee to plan and develop this innovative project.*
- **Harbor House - Madison, WI**
  - *11 unit affordable rental project integrated within a 240 unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding*
- **Bradley Crossing- Brown Deer, WI**
  - *11 unit affordable rental housing project targeted for families who have family members with permanent disabilities which is part of a 60 unit section 42 financed supportive housing project that Movin' out is doing in partnership with Jewish Family Services and General Capital Group*
- **Middleton Senior Apartments - Middleton, WI**
  - *8 units of affordable rental housing project for seniors with permanent disabilities as part of a 56 unit independent senior housing project which Movin' Out is doing in partnership with MSP Inc. The project is financed with a combination of section 42 tax credits and federal HOME funding.*
- **New Berlin City Center - New Berlin, WI**
  - *7 unit affordable rental housing project for families who have family members with permanent disabilities. This project is part of a 56 unit independent senior housing project which Movin' Out is doing in partnership with MSP Inc. The project is financed with a combination of section 42 tax credits and federal HOME funding.*

- Berkshire Greendale - Greendale, WI
  - 11 units of affordable rental housing for seniors with permanent disabilities as part of a 90 unit independent senior housing project which Movin' Out is doing in partnership with General Capital Group. The project is financed with a combination of section 42 tax credits and federal HOME funding.
- Elven Sted- Stoughton, WI
  - 33 unit affordable rental housing projects financed with Section 42 tax credits.
- North Port - Glendale, WI
  - 10 unit affordable rental project integrated within a 40 unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding
- Stonebridge - Madison, WI.
  - 12 unit affordable rental project integrated within a 300 unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding
- North Lawn Avenue – Madison, WI
  - Redevelopment of existing older single family home into a fully accessible rental duplex
- Shawano Duplex – Shawano, WI
  - Construction of a fully accessible rental duplex
- West Bend – West Bend, WI
  - Acquisition and rehabilitation of a fully accessible rental duplex
- Vandenberg Heights/Homes – Sun Prairie, WI
  - Redevelopment of former military housing subdivision consisting of 160 units of single family and duplex units. Sixty units financed with Section 42 tax credits with the balance rehabbed and marketed to lower income home buyers.
- Coachyard Square – Madison, WI
  - Development of 23 unit mixed- income condominium project in down town Madison
- Uplands Condominiums and SF Homes – Sun Prairie, WI
  - Development of 24 condominium units and 79 single family mixed income development as part of a 143 unit new subdivision
- Uplands Homes – Sun Prairie, WI
  - Development of 40 unit affordable rental family project financed with Section 42 Tax Credits as part of a 143 unit new subdivision

## GENERAL CAPITAL

COLLABORATE • INNOVATE • EXECUTE

**General Capital Group. Co-Developer.** General Capital will assist Movin' Out throughout the development process. The firm will provide technical assistance to Movin' Out as necessary and will help secure financing, investor commitments and project management during the construction process. General Capital operates a construction company through its subsidiary Bedrock Construction. Serving in this dual role as co-developer and general contractor will provide Movin' Out the benefit of working directly with the construction team during all phases of the project, including initial concept design, design development and final construction documents. General Capital is one of the most active real estate development firms in the Midwest, with specific experience with large-scale, mixed income housing developments in a variety of

urban and suburban communities. General Capital excels at analyzing, understanding and providing creative cost-effective solutions for real estate projects with complex legal, financial, and structural considerations. The firm's partners have extensive experience in financial underwriting, banking, credit analysis, architecture, urban design and project management. General Capital's expertise is evidenced through its 20-plus year development track record that includes more than 23 highly structured affordable housing tax credit developments, numerous grocery stores and grocery anchored shopping centers as a preferred developer for Kroger (Roundy's) in Southeast Wisconsin, student housing for the Milwaukee Institute of Art & Design (MIAD) and Fox Valley Technical College, several build-to-suit federal projects in Wisconsin and Florida and multiple industrial, commercial and market-rate multi-family projects.

One of our firm's core competencies is our ability to leverage public/private partnerships to facilitate complex real estate transactions. In nearly every affordable housing deal, we have obtained some form of leveraged public funding including TIF grants, HOME funds, CHDO HOME funds, City and County Housing Authority grants and loans, Project Based Voucher contracts, below-market loans and infrastructure rebates/funding. These deals simply do not work without multiple layers of local, state and federal money. Such highly structured transactions require financial sophistication and experience. General Capital has a track record of planning, negotiating and closing such complex transactions.

General Capital has successfully developed (independently or with joint venture partners) the following affordable housing projects with the same team (with the exception of the architect) as being proposed for the Stoughton project:

- **Greenwich Park Apartments** Milwaukee, WI
  - *53-unit Sect. 42 workforce housing*
  
- **Lakeside Gardens** Fond du Lac, WI
  - *80-unit Sect. 42 acquisition rehab workforce housing*
  
- **Berkshire – Paw Paw** Paw Paw, MI
  - *42-unit Sect. 42 independent senior housing*
  
- **Wildberry Village** Rockford, IL
  - *72-unit Sect. 42 acquisition rehab workforce housing*
  
- **Deerwood Crossing Phase II** Brown Deer, WI
  - *30 unit independent/assisted senior housing*
  
- **Bradley Crossing Phase II** Brown Deer, WI
  - *54-unit Sect. 42 supportive housing community*

- **Bradley Crossing Phase I** Brown Deer, WI
  - 60-unit Sect. 42 supportive housing community
- **Maria Linden** (School Sisters of St. Francis) Milwaukee, WI
  - 72-unit Sect. 42 independent/assisted senior housing
- **Berkshire—Greendale** Greendale, WI
  - 90-unit independent Sect. 42 senior housing
- **Rosewood Senior Apartments** Columbia County, PA
  - 86-unit Sect. 42 acquisition rehab independent senior housing
- **Whispering Hills** Port Byron, IL
  - 72-unit Sect. 42 acquisition rehab family housing
- **Elven Sted** Stoughton, WI
  - 33-unit Sect. 42 family housing
- **Beeline B Apartments** Milwaukee, WI
  - 140-unit Sect. 42 family housing
- **Hide House Lofts** Milwaukee, WI
  - 60-unit Sect. 42 family housing
- **Deerwood Crossing** Brown Deer, WI
  - 66 unit independent/assisted senior housing
- **Berkshire at Kensington** Waukesha, WI
  - 177-unit independent senior housing
- **McAuley Apartments** (St. Catherine Residence) Milwaukee, WI
  - 46-unit Sect. 42 family housing
- **Berkshire -- Oconomowoc** Oconomowoc, WI
  - 85 unit independent, bond financed senior housing
- **Berkshire – West Allis** West Allis, WI
  - 80 unit independent, Sect. 42 senior housing
- **Berkshire at Sunset** Waukesha, WI
  - 78 unit independent, Sect. 42 senior housing

- **The Berkshire** Grafton, WI
  - 66 unit independent, Sect. 42 senior housing
  
- **North Port Village** Glendale, WI
  - 42 unit independent, market rate senior housing
  
- **The Silvernail** Waukesha, WI
  - 90 unit independent, Sect. 42 senior housing

**Bedrock Construction - General Contractor.** Bedrock Construction has provided contracting and construction management services to numerous non-profit organizations, including Movin' Out on their Elven Sted project. Bedrock Construction is a wholly-owned affiliate of General Capital. David Hoff and Northtrack Construction will provide Construction Management services. By serving as our own GC, the development team maintains close control over the construction process. This platform has delivered successful outcomes for over 12 years on over 1,200 housing units.

**Glueck Architects – Architect.** Jim Glueck will serve as Architect for the 8th Street Apartments project. His responsibilities include overall design and coordination of the design team, project compliance with all applicable building and site regulations as well as guidance, quality control and approvals of work performed by General Contractor and its sub-contractors. Jim is particularly skilled at developing authentic architectural schemes that fit into the existing neighborhood. Glueck Architects designed Elven Sted, which fits particularly well in its neighborhood context.

**ACC Management Group - Property Manager.** ACC will play a critical role in the ongoing success of the project. While most property management firms take over when the project is complete, ACC is involved throughout the development process, providing valuable input to the design and development team on such issues as market-oriented amenities, desirable unit layouts and compliance-oriented design issues. ACC will market the property during construction and will manage all aspects of property management and programmatic compliance in the long term. ACC is currently Property Manager for Elven Sted.

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

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

## **Property Management**

### **ACC Management, Inc.**

Property Management services for 8th Street Apartments will be provided by ACC Management Group, Inc. Movin' Out has previous experience with ACC who has a well-established business in Wisconsin managing high-quality affordable housing projects.

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

## **Provision of Supportive Services**

The WHEDA tax credit program provides access to a valuable source of financing. It is distributed through a highly competitive process which requires developers to compete for an award by committing to plan and operate the project in specific ways in exchange for points awarded through the application process. One of the areas which WHEDA awards points for is called "integrated supported housing" under this category the developer commits to providing a specific number of units (but no more than 25% of the total units) which will be set aside as supported housing and will have very low rents (affordable to households with incomes < 30% of CMI).

WHEDA requires the developer demonstrate the required capacity by providing a plan to market these units to the intended population of low income households who either are military veterans or have permanent disabilities. They also require there to be a

plan for these tenants to have access to the supportive services they need. The information below and related attachments in this section includes this information and provides insight regarding the experience of this team to plan, develop and operate a successful integrated supportive housing project.

**o Characteristics of the specific target population(s)**

The initial pool of tenants for at least 12 units of housing will be people with developmental and other physical or behavioral disabilities who are eligible for long-term support services and who are referred by the Dane County Aging and Disability Resource Center, Dane County Department of Human Services (or the family care agency contracted by the State of Wisconsin to assume their responsibilities in the coming years), affiliated care managers, and affiliated supportive service providers serving qualified recipients of long term care living in Dane County **and/or** households that include one or more household members who are military veterans, are eligible for supportive services and who are referred by Dane County Veterans Services Office or affiliated veterans' supportive services providers serving qualified recipients of veterans' services in Dane County.

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

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

In planning this project we worked with the long term care and veterans service systems to confirm that there is need and demand for the proposed housing. This demand is further evidenced by the third-party market study commissioned for the project. This type of housing is fully consistent with federal, state and local policies regarding the development of supported housing as it is integrated into the community, does not require acceptance of supportive services but is coordinated with these services systems. It will not be owned or operated by business interests who provide direct supportive services; this provides a separation between housing and services. This arrangement provides for more stable housing by allowing the tenants to have a choice of services and more control over their living environment. The housing will not require licensure. The supportive units are integrated among the balance of units offering true community integrated housing which is the strong preference of people who rely on long term support and/or are military veterans.

**o Evidence of outreach activities and engagement with local collaborative long term support partners specifically to reach target population.**

The attached Agreement Letter from Dane County ADRC and MOU from the Dane County Veterans Service Office provide evidence of local collaboration between Movin' Out, this project and the long term support system for people relying on the long term care system and the veterans' supportive services system in Dane County. These two

agencies will be the primary (but not the sole) referral source for people seeking supported affordable housing. Additionally, Movin' Out has a long established network with these systems and a wide range of supportive service providers that are part of those systems. Movin' Out will work with that network to help coordinate services and assist these households to maintain tenancy in the project.

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

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

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

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

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

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

Movin' Out does not provide any type of personal care, residential case management, health care, or other typical direct service care provided by human or social services agencies, Movin' Out does provide housing counseling to households that include a family member with a permanent disability and to eligible veteran households. This counseling is designed to assist these households to evaluate their housing situation and establish a future housing plan. Often these plans need to account for not only typical housing issues such as household income and credit worthiness but also considers supportive service/ long term needs, transportation, employment, household composition, accessibility requirements and a number of other issues often faced by people with permanent disabilities and veteran families. These plans may lead to eventual home ownership, long-term tenancy in rental housing, or other stable, affordable, and integrated housing solution.

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

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

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

of the tenants. The housing will not be burdened with licensing required by congregate facilities, thus allowing the tenants to be seen and known as ordinary neighbors.

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

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

- Tenants with disabilities or are low-income veterans need individualized in-home support services available on a regularly scheduled basis and on short notice, when needed. The supportive services providers offer needed support, available in tenants' homes, to maintain good nutrition, hygiene and health, manage budgets and bills, establish a domestic routine, establish a safe environment and safe practices, provide quick response to emergencies, help to maintain good relationships with housemates and neighbors, monitor and dispense medication, help in figuring out how to get to work and social destinations using public transportation, and coordination of domestic routines and schedules to insure people get to work, appointments, and other commitments on time and prepared.
- Tenants with disabilities and veterans need to feel a sense of belonging and membership. The supportive service providers offer assistance in initiating and maintaining constructive relationships with housemates, neighbors, resident association members, friends, co-workers, and family members.
- Tenants with disabilities or veterans may need support in exercising responsibility, making choices, and providing direction and decision-making in developing and implementing a service plan that reflects one's own needs and preferences. The supportive service providers offer to facilitate the tenants' engagement in decisions about their housing and will coordinate with tenants' guardians, care managers, Movin' Out, and ACC, the designated property management company.

The supportive services providers will meet the needs and preferences of tenants by providing day to day, in-home supportive services. The tenants designated for supportive services will have individualized support plans. Services are

determined based on the needs and desires of each person and their support team. Individuals have the right to direct their own lives, including having a say in the selection of their service providers. For the purpose of this project, prospective residents will be provided the following supports:

- Staff support tenants in their homes to ensure safety and provide supervision as needed. Amounts of support range from 24 hours per day to come-in support a few hours each day or week.
- Autonomy and Choice: the supportive services providers chosen by tenants will ensure that individuals have choice about where and with whom they live, how personal time is used and what services are received.
- Relationships/Community Involvement: the supportive services provider will assist with opportunities to develop and maintain relationships with friends, family and community members. Individuals will have opportunities to participate in community life and will get help in coordinating plans, help with maintaining relationships with friends and neighbors, and coordination of transportation, as needed, to get to the right place at the right time.
- Organization/communication: the supportive services provider staff will work cooperatively with each individual to plan and organize their daily routine, including coordinating transportation, special events, communicating as needed with other service providers, support brokers and family members.
- Medication assistance and medical advocacy: Staff will assist each person, as needed, with medication administration, ensuring accuracy and consistency of needed medications. Staff will work with the individuals and their teams to ensure medical appointments are attended, when necessary, and that any medical issues that arise are addressed promptly and appropriately. Staff will monitor the need for follow up appointments and maintain documentation of medical history.
- Personal Care: Staff will assist the individuals with personal care including bathing, hair care, tooth brushing, toileting, dressing, care of eyeglasses/hearing aids, assistance with mobility/ambulation, skin care, use of assistive devices and any other assistance necessary.

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

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

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

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

### **Veteran-Specific Services**

8th Street Apartments will also offer comprehensive supportive services to eligible military veteran households in a fashion similar to that described above. The marketing and outreach efforts for veterans will be coordinated with the Dane County Veterans

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

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

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

## **Architect**

### **Glueck Architects**

Please see attached resume and selected project list for information on Glueck Architects. Glueck Architects has received numerous architectural awards (several of these projects were projects developed by Movin' Out). The project will construct following Wisconsin Green Built practices and will be certified by Wisconsin Green Built Homes.

## **Contractor**

Bedrock Construction has provided contracting and construction management services to numerous non-profit organizations, including Movin' Out on their Elven Sted project. Bedrock Construction is a wholly-owned affiliate of General Capital. David Hoff and Northtrack Construction will provide Construction Management services. By serving as our own GC, the development team maintains close control over the construction process. This platform has delivered successful outcomes for over 12 years on over 1,200 housing units.

# **glueck architects** LLC

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116 North Few Street  
Madison, Wisconsin 53703  
(608) 251-2551  
(608) 251-2550 fax  
glueckarch@sbcglobal.net

## **COMPANY INFORMATION**

Glueck Architects LLC  
116 North Few Street  
Madison, WI 53703

Glueck Architects was formed in January 1989. We are an LLC, filing as an S Corporation. While our office has been involved with a variety of projects over the years, our work in the area of affordable housing is the heart of our practice.

Our major mission is to provide services that will help create quality housing environments by working closely and cooperatively with a team including developer, design professionals, and construction professionals. Our philosophy is that everyone should have a quality residential environment, and that this is one of many important components that can contribute to making a difference in people's lives.

We believe that good communication and listening skills are an essential part of a successful project. We have successfully navigated City/Town/Village approval processes in many municipalities in Wisconsin.

We have been actively involved with ADA, Fair Housing, UFAS and ANSI and building code requirements on a variety of new and remodeled projects for the last twenty-seven years.

A list of selected projects is attached, as well as a resume.

## **INSURANCE**

We carry professional liability insurance of \$1,000,000. Holmes Murphy is our agent. I also carry a \$1,000,000 automobile insurance, \$1,000,000 general liability policy and Worker's Compensation, all through State Farm. Typically, I request that my subconsultants carry the same.

Should you need more information, feel free to contact us.

**SELECTED PROJECT LIST** Completed Housing Projects  
Glueck Architects / Jim Glueck

**Elven Sted**

Stoughton, Wisconsin

New Construction/Movin' Out, Inc.

New Apartments and Townhouses, 33 units

Green Built and Energy Star Certified

Mix of affordable and market rate units

**Monroe Street Apartments**

Waterloo, Wisconsin

New Construction/Movin' Out, Inc. and Mirus Partners

New Apartments, 24 units

Green Built and Energy Star Certified

Mix of affordable and market rate units

**Jenifer Place**

Madison, Wisconsin

Major Remodeling/ Common Wealth Development Inc.

12 units, for low-moderate income individuals and families

**The Parkview Apartments Phase III**

Caledonia, Wisconsin

New construction/ The Parkview L.L.C.

Affordable Senior Housing, 73 units

**Harbor House**

Madison, Wisconsin

Remodeling/Movin' Out, Inc.

Apartments, 11 units

Green Built Certified

Accessibility alterations (HUD funded)

**Park Glen Commons Apartments**

Madison, Wisconsin

New Construction/ Oakbrook Corporation

New Senior Housing, mixed income, 110 units

**Stonebridge**

Madison, Wisconsin

Remodeling/Movin' Out, Inc.

Apartments, 11 units

Green Built Certified

Accessibility alterations (HUD funded)

**Arboretum Cohousing**

**Madison, Wisconsin**

New Construction

New Cohousing, 29 units (intergenerational design)  
Many green features

**Troy Gardens**

Madison, Wisconsin

New Construction/ Madison Area Community Land Trust

New Condominium townhouses on conservancy parcel, 30 units  
Mix of affordable and market rate units  
Designed using cohousing principles  
Green Built and Energy Star Certified

**Sherman Glen Apartments**

Madison, Wisconsin

New construction/ Nevac Group Ltd.

Affordable Senior Housing, 98 units

**Mifflin Street Apartments**

Madison, Wisconsin

New Construction/ Madison Development Corporation

New Affordable Apartments, 6 units

**Tellurian SRO Housing**

Madison, Wisconsin

Addition/ Tellurian

Office space and SRO units for persons with mental illness

**Marquette Manor Senior Apartments**

South Milwaukee, Wisconsin

New construction/ Great Lakes Companies

Affordable Senior Housing, 74 units, 1 building

**The Parkview Apartments Phase II**

Caledonia, Wisconsin

New construction/ The Parkview L.L.C.

Affordable Senior Housing, 73 units

**The Parkview Apartments Phase I**

Caledonia, Wisconsin

New construction/ The Parkview L.L.C.

Affordable Senior Housing, 73 units

**Independent Living Retirement Community**

Madison, Wisconsin

Major remodeling/ Independent Living Inc.

Affordable Senior Housing, 14 units created in remodeling  
CBRF, 16 beds created in remodeling

**Sedgemoor Senior Apartments**

Elkhorn, Wisconsin

New construction/ Cedar Mill Homes  
Affordable Senior Housing, 48 units, 1 building

**Spring Brook Senior Apartments**

Burlington, Wisconsin  
New construction/ NEVAC Group, Ltd.  
Affordable Senior Housing, 48 units, 1 building

**Lincoln Court Senior Apartments**

Mount Horeb, Wisconsin  
New construction/ Contemporary Real Estate Development  
Affordable Senior Housing, 25 units, 1 building

**Senior Condominiums**

New Vienna, Iowa  
New Construction/Geralyn Lu, developer  
New Townhouses, 4 units

**Camino Del Sol**

Madison, Wisconsin  
New Construction/ Madison Area Community Land Trust  
New Affordable Subdivision, 11 units  
Green Built and Energy Star Certified

**Yahara River View Apartments**

Madison, Wisconsin  
New construction/ Common Wealth Development  
Affordable Housing, 60 units, 1 building

**Housing Initiatives**

Madison, Wisconsin  
New construction/ Housing Initiatives  
Apartments for persons with mental illness  
Offices for Housing Initiatives

**Ellsworth Town Homes**

Ellsworth, Wisconsin  
New construction/ West Cap Community Action Program  
Affordable Housing, 24 units, 6 buildings

**Coachyard Square**

Madison, Wisconsin  
New Construction/ Wisconsin Partnership for Housing Development  
Condominiums, 23 units

**Cable Apartments**

Cable, Wisconsin  
New Construction/ Housing Authority of the County of Bayfield  
Affordable Rental Housing, 8 units

**Project Home/Allied Drive Apartments**

Madison, Wisconsin

Major renovation/ Project Home Development  
Affordable Rental Housing, 48units, 6 buildings

### **Monona Shores Apartments**

Madison, Wisconsin

Major renovation/ CDA of the City of Madison  
Affordable Rental Housing, 105 units, 8 buildings  
Affordable For Sale Condominiums, 34 units, 4 buildings

### **Sunrise Meadow Homes**

Barron, Wisconsin

New construction/ West Cap Community Action Program  
Affordable Housing, 24 units, 6 buildings

### **Sunlight Terrace Homes**

Glenwood City, Wisconsin

New construction/ West Cap Community Action Program  
Affordable Housing, 8 units, 2 buildings

### **Colfax Prairie Homes**

Colfax, Wisconsin

New construction/ West Cap Community Action Program  
Affordable Housing, 24 units, 5 buildings

### **New Glarus School Apartments**

New Glarus, Wisconsin

Historic Remodeling/ Stone House Development  
Affordable Housing, 24 units

### **Rodney Scheel House**

Oak and Hawk Streets Madison, Wisconsin

New construction/ Rodney Scheel House Foundation, Ltd.  
Affordable Housing, 23 units, HUD 811 program, for persons with AIDS

### **Victorian Hill Condominiums**

North Blount and East Johnson Street Madison, Wisconsin

New construction/Thompson Development  
Market rate downtown condominiums, 9 units, with commercial space on first floor  
Project received Orchid Award from Capital Community Citizens

### **Timber Trails Apartments**

Wisconsin Rapids, Wisconsin

New construction/ Heartland Properties Inc.  
Affordable Housing, 64 units

### **The Landings Apartments**

Waupun, Wisconsin

New construction/ Heartland Properties Inc.  
Affordable Housing, 64 units

**Marshfield Tower Hall**

Second Street Marshfield, Wisconsin

Remodeling/addition/ Heartland Properties, Inc.(Historic Building: old Marshfield City Hall)  
Affordable Housing, 20 units, with commercial space on first floor Adaptive reuse of city hall building; masonry construction

**Jeffris Flats**

318-320 West Dodge Street Janesville, Wisconsin

Remodeling/ YWCA (Historic Building)  
Affordable Housing, 11 units, with community space, Adaptive reuse of 1890's Victorian flats, masonry construction

**641 West Main Street**

641 West Main Madison, Wisconsin

New construction / Madison Mutual Housing Association  
Cooperative Housing, 60 units, for mixed-income group, including Barrier-Free design features  
Project received Orchid Award from Capital Community Citizens

**Falconer Cooperative Housing**

1001-1011 Williamson Street ° Madison, Wisconsin

New construction/ Common Wealth Development Inc.  
Cooperative Housing, 8 units, for low-moderate income individuals and families, including Barrier-Free design features

**The Avenue Cooperative Housing**

Project Co-Architect (not Glueck Architects)

1948-54 East Washington Avenue ° Madison, Wisconsin

New construction and remodeling / Madison Mutual Housing Association  
Cooperative Housing, 40 units, for mixed-income group, including Barrier-Free design features  
Project received award from Madison Trust for Historic Preservation  
Project received Orchid Award, Capital Community Citizens  
Project received Merit Award, Wisconsin Society of Architects

**The Reservoir Cooperative Housing**

Project Architect (not Glueck Architects)

East Dayton and North Blount Streets Madison, Wisconsin

New construction and remodeling / Madison Mutual Housing Association  
Cooperative Housing, 28 units, for mixed-income group, including Barrier-Free design features  
Project received Orchid Award, Capital Community Citizens

# James Glueck

# Architect

116 North Few Street  
Madison, Wisconsin 53703  
(608) 251-2551

## Education:

1973 Bachelor of Science in Architecture, University of Michigan  
1976 Master of Architecture, with distinction, University of Michigan  
(Primary areas of study: Residential Environment/ Analysis and Design;  
Historic Preservation)

Architectural Registration: State of Wisconsin (NCARB)

WHEDA Capital Needs Assessment Provider

## Architectural Experience:

**1989 to Present:** Glueck Architects LLC, Madison, WI  
Principal/Owner

Multifamily Residential, Historic Preservation, Single-Family Residential, Mixed Use  
and Commercial Design Projects, Needs Assessments, Property Inspections

**1978 to 1989:** Design Coalition, Inc., Madison, WI  
Position: Project Architect and Member of Managing Staff  
Duties: Complete range of architectural services for various  
residential and commercial projects

**1977 to 1978** Space Partnership, Madison, WI.  
Design, design development, construction documents and field  
supervision for housing, offices and restaurants.

**1976 to 1977** Arlan Kay and Associates, Madison, WI  
Design, development and construction documents for residential projects.

**1976** North Central Property Owners Association (Community  
Design Center), Ann Arbor, Michigan. Community related  
projects and activities.

**1973 to 1975** Wold Bowers Deshane Covert Grand Rapids, Michigan.  
Design department work for residential, office and school projects.

## Selected Awards

**Troy Gardens 2007** Project Architect  
Madison, Wisconsin  
New Construction/ Madison Area Community Land Trust  
Affordable Condominiums, 30 units

Project received Livable Communities Award from AARP and National Association of Home Builders  
Project received Award from Home Depot Foundation including \$75,000 award to developer

**Sol Levin Award 2004**  
Awarded by Madison Area Community Land Trust and Housing Initiatives for work in the area of affordable housing

**Wilson Hotel 2000** Project Architect  
Madison, Wisconsin  
Restoration/ Bob Worm, Owner

Project received Historic Preservation Award from Madison Trust for Historic Preservation  
Project received Orchid Award from Capital Community Citizens

**Olin Park Pavilion 2000** Project Architect  
Madison, Wisconsin  
Restoration/ City of Madison Parks Division

Project received Historic Preservation Award from Madison Trust for Historic Preservation  
Project received Orchid Award from Capital Community Citizens

**Coachyard Square 1999** Project Architect  
Madison, Wisconsin  
New Construction/ Wisconsin Partnership for Housing Development  
Affordable Condominiums, 23 units

Project received Orchid Award from Capital Community Citizens

**Monona Shores/Waunona Woods 1999** Project Architect  
Madison, Wisconsin  
Rehabilitation and Redesign/ City of Madison Community Development Authority

Project received Meritorious Achievement Award from Association of Local Housing Finance Agencies in their 1999 national competition

**Bernard-Hoover Boathouse 1996** Project Architect  
Madison, Wisconsin  
Restoration/ City of Madison Parks Division

Project received Historic Preservation Award from Madison Trust for Historic Preservation

**Victorian Hill Condominiums** 1995  
Madison, Wisconsin  
New Construction, Housing & Commercial/Thompson Development

Project received Orchid Award from Capital Community Citizens

**Tenney Nursery and Parent Center** 1992-3  
Madison, Wisconsin  
Adaptive reuse, nursery school

Project received Orchid Award from Capital Community Citizens

**641 West Main Street** 1992 Project Architect  
Madison, Wisconsin  
New construction / Madison Mutual Housing Association  
Cooperative Housing, 60 units, for mixed-income group, including Barrier-Free design features

Project received Orchid Award from Capital Community Citizens

**Cooperative Housing Design** 1990 Project Architect  
Madison, Wisconsin  
New construction (project not built) / Madison Mutual Housing Association  
Cooperative Housing, 17 units, for mixed-income individuals and families, including Barrier-Free design features

Project Entry received Merit Award, Search For Shelter Competition, Wisconsin Society of Architects

**Avenue Cooperative Housing** 1989 Project Co-Architect  
1948-54 East Washington Avenue Madison, Wisconsin  
New construction and remodeling / Madison Mutual Housing Association  
Cooperative Housing, 40 units, for mixed-income group, including Barrier-Free design features

Project received award from Madison Trust for Historic Preservation  
Project received Orchid Award, Capital Community Citizens  
Project received Merit Award, Wisconsin Society of Architects

**The Reservoir Cooperative Housing** 1987 Project Architect  
East Dayton and North Blount Streets Madison, Wisconsin  
New construction and remodeling / Madison Mutual Housing Association  
Cooperative Housing, 28 units, for mixed-income group, including Barrier-Free design features

Project received Orchid Award, Capital Community Citizens

**Cambridge, Wisconsin:** 16 existing commercial facades 1985-1987

Historically sensitive rehabilitation/ Architectural Consultations

Village received Historic Preservation Award from Madison Landmarks Commission/Dane County Cultural Affairs Commission, and received Orchid Award from Capital Community Citizens

**1234 Williamson Street** (Madison Appliance Parts) 1983 Project Architect  
Madison, Wisconsin  
Facade Restoration  
Mixed Commercial/Residential use

Project Received Award, Madison Landmarks Commission/Dane County Cultural Affairs Commission

## **Publication**

Authored and illustrated Improving Your Home: A Guidebook, 95 pp., printed by a grant from the University of Michigan, 1976.

## **Community Service**

Member, Madison Building and Fire Code Review and Appeals Board,  
1991- 2001, 2005-2011, and 2012-present

Member, Mayor's Advisory Subcommittee on Building  
Rehabilitation Codes, City of Madison, 1981

Board Member, Design Coalition Inc., 1977-78

Board Member, Tenney-Lapham Corporation (neighborhood-based non-profit  
economic development corporation) 1983-84

Member, Alternate Parade of Homes Selection Committee,  
Marquette Neighborhood 1980

Panelist, Cooperative Housing: A Vision for the Eighties  
(Conference), 1980

Panelist, 8th Annual Fair Housing Conference, 1992

Speaker, "Building Today for Tomorrow" Conference on Universal Design, 2002  
and 2003

Speaker, "Creating Accessible Communities: A Conference for Housing  
Consumers, Designers and Builders, 2007

Speaker, "A Home for Everyone 2009: Building a Foundation for the Future,  
Wisconsin Collaborative for Affordable Housing, 2009



April 14, 2017

Property management services for 8th Street Apartments will be provided by ACC Management Group, Inc. (ACC). Movin' Out and General Capital Group have experience working with ACC on multiple affordable housing properties throughout Wisconsin including the Elven Sted Apartments located across the street from the 8th Street Apartments proposed development site. Elven Sted is a 33-unit property with an outstanding occupancy history and similar characteristics to Wilcox Place including the use of Low Income Housing Tax Credits (LIHTC) as the primary funding source.

ACC was selected as property manager for 8th Street Apartments for many reasons including affordable housing management experience, efficiencies with also managing Elven Sted, and tenant selection criteria sensitive to those in need of affordable housing. ACC utilizes a tenant selection process that follows fair housing guidelines, protects the property, and allows for secondary options to those applicants that may otherwise be denied housing.

Common reasons for denying a tenant application include:

- Not enough household income (minimum income requirement)
- Poor credit
- Criminal history
- Poor landlord reference

The following ACC policies give secondary options to those that may typically be denied:

- For affordable housing properties in the LIHTC program, the minimum income requirement has been lowered to two times the monthly rent. Widespread practice is up to three times monthly rent.
- Applicants have the option to obtain a co-signer for their lease to satisfy the minimum income criteria or to overcome poor credit.
- Additional options to overcome poor credit include:
  - Obtaining a payee or sponsor to ensure payment of rent
  - Paying a security deposit equal to 1.5 times the monthly rent (standard is equal to one month rent)
  - Providing proof of the ability to pay rent based on rental history of paying a similar amount

ACC has extensive experience managing affordable housing throughout the greater Madison area and Wisconsin utilizing these criteria. The full tenant selection criteria and property list are attached.

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TURN TO US FOR A CLEAR DIRECTION

2375 State Highway 44, Suite A • Oshkosh, WI 54904 • Phone 920.966.9905 • Fax 920.966.1325  
info@accmgmtgroup.com • www.accmanagementgroup.com • Equal Housing Opportunity

ACC Management Group - Site List

Property	Units	Address	City, State, ZIP	Property Description	Average Occupancy %
5th Avenue Lofts	60	5821 5th Avenue	Kenosha, WI 53140	Section 42 - Family Site - 1 Building	97%
700 Lofts	49	700 W Michigan Avenue	Milwaukee, WI 53208	Section 42 - Family Site - 2 Buildings	95%
Anthem Luxury Living	80	431 Marion Road	Oshkosh, WI 54901	Market Rate - Family Site - 1 Building	98%
Arbor Green	48	6001 56th Street	Kenosha, WI 53142	Section 42/Section 8 Family site - 7 Buildings	98%
Arlington Heights / Glendale Heights Bay Hill	36	Scattered Sites	Milwaukee, WI	Section 42 - Family Site - 2 Buildings	95%
	68	613 N 12th Avenue #101	Sturgeon Bay, WI 54235	Rural Development layered with Section 42 - Family/Senior Site. There are 11 buildings of which one is Senior Apartments remaining are private entrance townhomes.	95%
Bayshore Townhomes	32	625 E. Main St.	Sparta, WI	Section 42 - Family	Under Const
Bayside Senior Apartments	24	237 Cook Avenue	Oconto, WI 54153	Section 42/Senior site - 1 building	96%
Bayview Terrace City	36	537 South Neenah Avenue	Sturgeon Bay, WI 54235	Rural Development - Senior Site - 3 Buildings	98%
Bayview Terrace North	24	2261 Mill Rd.	Sister Bay, WI 54234	Section 8 senior site - 4 buildings	100%
Blackhawk Apartments	8	635 & 665 W. Blackhawk Dr.	Fort Atkinson, WI	Market Rate - Family Site - 2 Buildings	100%
Blackstone Harbor	24	10529 Judith Blazer Drive	Sister Bay, WI 54234	Section 42 - Family Site - 3 Buildings	100%
Bradley Crossing 80	60	4375 West Bradley Rd.	Brown Deer, WI 53209	Section 42 with 30 Sec 8 Vouchers - Family	98%
Bradley Crossing 54	54	4417-4423 West Bradley Rd.	Brown Deer, WI 53209	Section 42 - Family	98%
Central Park Towers	164	120 S State Street	Elgin, WI 60123	RAD - Section 42 - 2 Buildings	98%
Deerwood Crossing	66	4195 W Bradley Road	Brown Deer, WI 53209	Section 42 - Senior Site - 1 Building	98%
Deerwood Crossing II	30	4195 W Bradley Road	Brown Deer, WI 53209	Section 42 - Family Site - 1 Building	100%
Elven Sted Apartments	33	623 Eighth Street	Stoughton, WI 53589	Section 42 - Family Site - 3 Buildings	96%
Fairview Crossing	55	1911 N Main Street	Oshkosh, WI 54901	Section 42 - Family Site - 6 Buildings	95%
Fairview Crossing II	24	29 E. Paine Street	Kiel, WI 53042	Rural Development - Family Site - 3 Buildings	95%
Family Court	104	Scattered sites	Elgin, IL 60123	Section 8 / Section 42	In Lease up
Flagship:				Both Sites are Section 8 - Elderly and Family, common entrance.	
Darford Bay-Landing	33	504 S Mill Street	Green Lake, WI 54941	Meadow Creek has 3 Buildings; 1 Senior 25 units; 1 Family - 8 units and 1 Family - 4 units Darford Bay has 2 Buildings; 1 Senior 25 units and the Landing is 1 Family - 8 units	94%
Meadow Creek	37	1119 Roseland Drive	Kewaskum, WI 53040		
Fox Crossing Apartments	24	200 Bridge Street	Burlington, WI 53105	Section 42 - Family Site - 1 Building	98%
Fox Crossing II Apartments	32	Burlington, WI 53105	Burlington, WI 53105	Section 42 - Family Site - 1 Building	100%
Grand Ave Lofts	32	2905 W. Wisconsin Ave	Milwaukee, WI 53208	Section 42 - Family Site - 1 Building	94%
Hartford Highlands Apartments	44	633 E Monroe Ave	Hartford, WI 53027	Affordable - Family Site - 3 Buildings	96%
Heritage Apartments	32	905 Madison Ave.	Marquette, WI	Section 42 - Family Site - 2 Buildings	98%
Ingram Place	53	456 E. Brown St.	Milwaukee, WI	Section 42 - Family Site - 1 Building	95%
Janesville Garden Court	164	208 N. Main St.	Janesville, WI 53545	Section 8 - Senior Site - 1 Building	97%
Jefferson Apartments	64	602 Collins Road	Jefferson, WI 53549	Section 8 - Section 42 - Rural Development - Family Site - 9 Buildings	95%
Kenwood Senior Living	24	1479 Pleasant Street	Ripon, WI 54971	Section 42 - Senior Site - 1 Building	96%
Lakeside Gardens	80	391A N. Peters Avenue	Fond du Lac, WI 54935	Section 42/Section 8 - Family Site - 17 Buildings	96%
Layton Square	57		Curahy, WI	Section 42 - Family Site - 1 Building	In Lease up
Maple Lawn	81	1914 Pike Drive #1	Fitchburg, WI 53713	Section 42 - Family Site - 12 Duplexes	97%
Meadows of Mill Creek	24	247th Ave	Salent, WI 53168	Section 42 - Family Site - 1 Building	98%
Mercantile Lofts	36	611 W. National Ave.	Milwaukee, WI	Market Rate - Family Site - 1 Building	95%
Nicoret Townhomes	60	1380 Scheuing Road	De Pere, WI 54115	Section 42 - Family Site - 9 Buildings	95%
Northwoods	72	2520 N. Martin Luther King Drive	Milwaukee, WI 53212	Section 42/Section 8 - Family Site - 2 Buildings	95%
Oconomowoc School Apartments	55	623 Summit Ave	Oconomowoc, WI 53066	Section 42 - Family Site - 1 Building	98%
Park Hill Senior Apartments	62	555 W. Concordia Avenue	Milwaukee, WI 53212	Section 8 - Senior Site - 1 Building	98%
Residences on Main	24	307 E Main St	Twin Lakes, WI 53181	Section 42 - Senior Site - 1 Building	100%
Seven Oaks (formerly Nob Hill)	254	1108 Moorland Rd	Madison, WI 53713	Section 42 - Family Site - 7 Buildings	96%
Shoe Factory Lofts	55	224 W. Washington St.	Milwaukee, WI	Section 42/Section 8 Senior/Family Site - 2 Buildings	100%
Silvercrest Apartments	36	630 S Conswell Drive	Silver Lake, WI 53170	Section 42 - Family - 9 Buildings	94%
Southview Park Apartments	70	128 Bell Street #102	Neenah, WI 54956	Section 42/Section 8 - Family Site - 9 Buildings	98%
Terrace Heights	50	1321G Townline Rd	Wausau, WI 54403	Section 42 - Family Site - 1 Building	92%
Teutonia Gardens	24	2709 N. Teutonia Avenue	Milwaukee, WI 53206	Section 42 - Family Site - 1 Building	100%
The Rivers II	40	465 Marion Rd.	Oshkosh, WI 54901	Section 42 - Senior Site - 1 Building	96%
The Rivers Senior Living	60	475 Marion Road	Oshkosh, WI 54901	Section 42 - Family Site - 10 Single Family Homes/7 Duplexes	95%
United Homes	24	2801 N. 27th Street	Milwaukee, WI 53210	Section 42 - Family Site - 3 Bedroom Duplexes	95%
Uplands Homes	40	3540 W Lisbon	Milwaukee, WI 53208	Section 42 - Family Site - 18 Buildings	98%
Whitewater Woods	40	249 Musket Ridge Drive	Sun Prairie, WI 53590	Section 42 - Family Site - 18 Buildings	92%
Willow Heights	64	340 N Newcomb St Apt	Whitewater, WI 53190	Section 42 - Rural Development - 5 Buildings	95%
Woolen Mills	60	1460 Wellington Way	Deeratur, IL 62526	Section 8 - Senior Site - 1 Building	Under Const
	60	218 E. South Island St.	Appleton, WI	Section 42 Family - 1 Building	Under Const
	3050				

**TAB 3**

**Project Description**

## **Project Description**

The project site is located in the heart of the City of Stoughton one block South of downtown fronting on the Yahara River. It is located directly across the Eighth Street from Movin' Out's other project in Stoughton, Elven Sted. 8th Street Apartments is part of a larger redevelopment district created by the City of Stoughton called the Riverfront Redevelopment Area which is a 10-acre former industrial site consisting of a combination of City and privately owned parcels. The city has selected another developer Tanesay Development to be the Master Developer for the overall site. Movin' Out and our team will be coordinating our efforts with their team and the City.

This project will develop 59 units of housing offering a range of unit sizes, types and rent levels. There will be two four-unit townhouse style buildings and one 51-unit three-story apartment building which will include a community room, leasing office and exercise room. There will be both surface parking and detached garages, green space, community garden space and a tot-lot playground.

The site currently consists of a combination of parcels with existing buildings and vacant land which are either owned by the City of Stoughton Redevelopment Authority or are in the process of being purchased by them. Prior to construction the RDA will convey the site to the project ownership entity.

The project is located in close proximity to all needed community services including a wide range of employers (insurance, social services, retail, manufacturing, warehousing etc.) within one mile of this location. There is a general hospital within approximately 1 mile of the site, All K - 12 schools are within 2.4 miles. There is a city park directly across the Yahara River from the site. A full service grocery/ department store (Walmart) is 2¼ miles away and a second grocery (Coop) 3 blocks away on Main Street. There is a wide range of other community services all within easy walking distance of this site.

## **Types of Units**

The project will provide affordable housing options for a mix of family sizes and incomes. The chart below breaks out the unit types, income targeting and proposed rents. The townhouse buildings will contain three bedroom units. Fifty units will be income restricted per the chart below. Thirteen percent of the units (8) will be three bedroom units and twenty percent of the units will be reserved for very low income tenants who either have a permanent disability or are income eligible military veterans many of whom have experienced homelessness. The rent for these supported housing units will be restricted to households earning at or below 30% of area median income.

<b>RESIDENTIAL RENTS</b>		
Unit Type	# Units	Mo. Rent
1 bedroom (30%)	3	422.00
1 bedroom (60%)	1	895.00
1 bedroom (Market)	8	950.00
2 Bedroom (30%)	6	506.00
2 Bedroom (40%)	9	695.00
2 Bedroom (50%)	7	795.00
2 Bedroom (60%)	16	930.00
2 Bedroom (Market)	1	1,000.00
3 Bedroom (30%) (+ heat)	3	495.00
3 Bedroom (50%) (+ heat)	5	1,017.00
<b>TOTAL</b>	<b>59</b>	

### Operating Budget

The projected operating expense budget for the housing is below

<b>Operating Expenses</b>		
Payroll	\$82,028	\$1,390
Administration	\$31,620	\$536
Management Fee	\$31,516	\$534
Utilities	\$51,216	\$868
Operating & Maintenance	\$75,107	\$1,273
Real Estate Taxes	\$72,157	\$1,223
Insurance	\$20,441	\$346
<b>TOTAL</b>	<b>\$364,085</b>	<b>\$6,170</b>

## Development Capital Costs

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

	<b>Total</b>
Site Acquisition	0
<b>Total Land Costs</b>	0
Shell/Interior	6,302,400
Contingency	315,120
Gen Requirements	327,620
GC Overhead	137,600
GC Profit	350,881
Permit Fees	24,000
Bond & Costs Cert	94,536
<b>Total Building Costs</b>	<b>7,552,157</b>
<b>Site Work</b>	
Site Work (acre)	250,000
Signage	
Landscaping	0
<b>Total Site Work</b>	<b>250,000</b>
<b>Subtotal Construction Costs</b>	<b>7,802,157</b>
<b>FFE</b>	<b>100,000</b>
<b>Total Construction Costs</b>	<b>7,902,157</b>
Loan Application Fee	500
Lender Legal	15,000
Tax Credit Application Fee	2,000
Tax Credit Fee	71,350
Lenders Arch Review	12,000
<b>Subtotal Lending Costs</b>	<b>100,850</b>

Accounting	20,000
Legal Building	90,000
Architectural/Civil Engineering	160,000
Engineering	30,000
Survey --	10,000
Appraisal	7,500
Environmental	30,000
Market Study	5,700
Misc.	50,000
<b>Subtotal Building Soft Costs</b>	<b>403,200</b>
Title & Recording	15,000
Rent up/Marketing - Residential	50,000
<b>Subtotal Title and Marketing</b>	<b>65,000</b>
Real Estate During Construction	15,000
Construction Utility Expense	25,000
Construction Insurance	35,000
Bridge Loan Origination Fee	82,000
Construction Interest	173,000
<b>Subtotal Construction Taxes, Fees and Insurance</b>	<b>330,000</b>
Development Fee	1,000,000
Organizational - Legal	10,000
Organizational - Accounting	0
Syndication - Legal	0
Syndication - Accounting	0
<b>Subtotal Other Soft Costs</b>	<b>10,000</b>
WHEDA Initial Compliance	4,720
Operating Reserve	250,636
<b>Subtotal Reserves</b>	<b>255,356</b>
<b>Total Soft Costs</b>	<b>2,164,406</b>
<b>Total Project Costs</b>	<b>10,066,563</b>

## Sources of Financing

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

A summary of the proposed funding sources is in the table below. An application is being submitted to the Federal Home Loan Bank of Chicago for \$750,000 in Affordable Housing Funding. We are in the process of submitting a second application to the Dane County CDBG office for HOME funding for \$300,000. We will be negotiating with the City for Tax Incremental Financing support currently listed as \$924,242. We will submit an application to WHEDA in December for a commitment of tax credits which will generate the equity investment.

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

First Mortgage	1,767,065
Dane County Home Funds	300,000
TIF	324,242
Dane County AHF	550,000
FHLB-AHP	750,000
Deferred Fee	25,107
Tax Credit Equity	6,350,150
<b>Total Sources</b>	<b>10,066,563</b>

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

**TAB 4**  
**Housing First**

# Housing First

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

While we do not provide direct supportive services Movin' Out does coordinate with service providers who are supporting our tenants. We specialize in this by coordinating between our tenants, their service providers, our contracted third party property managers, the tenants' family members and the other residents. We are often called on to assist in dealing with a wide range of issues that arise for the tenants in the supported housing units with a goal of having them be successful in maintaining their tenancy.

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

Another Movin' Out core value is providing housing options that integrate people with special needs of various types into the community. This is important for a number of reasons but first and foremost is that the feedback we have received from the majority of people who need various types of supported housing is they want to live in "regular" housing of their choice and with whom they choose. It is also important because it offers the opportunity for these tenants to establish relationships and friendships with neighbors who may be in a position to provide "natural supports" meaning having relationships with people who are neither paid to have that relationship or who also have a "label" of some type themselves.

Finally it is important because it contributes to the feasibility of developing a project because the project is not 100% very low income, does not require as much subsidy, is more acceptable to the neighborhoods it is located in and is perceived as less risky by lenders and investors and therefore is easier to finance. The housing Movin' Out develops does not require licensing or special zoning. As a result Movin' Out does not develop any multifamily project where more than 25% of the units are supported housing units.

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

## **TAB 5**

**Targeted Population**

## Targeted Populations

8th Street Apartments is being designed to provide affordable non-age restricted housing to a range of household sizes and income levels. Twenty percent of the 59 units (12 units) will be operated as supported housing. These units will be affordable to and reserved for very low income (30% county median income or below).

Through affirmative marketing coordinated by Movin' Out staff and the property manager the supported housing units will be marketed to income eligible households that either include a household member with a permanent disability and/or are a military veteran. Often some of these individuals have experienced homelessness. Movin' Out has established working relationships with a network of organizations and agencies who offer a wide range of supportive services to people with disabilities and veterans. We will be doing marketing and outreach through this network including working with Dane County Department of Human Services (and their successor agency under family care), the Dane County Aging and Disability Center (ADRC), the Dane County Veterans Services Office and the U.S. Department of Veterans Affairs. Through these agencies and their contracted direct service providers we anticipate a high level of interest and continued occupancy of the supported housing units. The table below illustrates the levels of affordability offered in the project rents.

# of BRs	Maximum HH Income/AMI	#units	Monthly Rent
1 BR	30%	3	\$422
1 BR	60%	1	\$895
1 BR	MKT	8	\$950
2 BR*	30%	6	\$506
2 BR*	40%	9	\$695
2 BR*	50%	7	\$795
2 BR*	60%	16	\$930
2 BR*	MKT	1	\$1,000
3 BR	30%	3	\$495
3 BR	50%	5	\$925
<b>Total</b>		<b>59</b>	

In addition to the supported housing units the project offers high quality very affordable housing to area working families in the area. There will be 9 market rate units with the remaining 50 units at rents affordable to households earning no more than 60% of county median income.

**TAB 6**

**Supportive Services Plan**

**Supportive Housing Service Plan  
For  
8th Street  
Apartments**

LIHTC developers requesting points with the submission of Appendix S, "Certification to Create Rental Units for Persons Needing Supportive Services," must provide adequate information for DHS to review their proposal. The following checklist is intended to assist developers in providing the necessary information. It is important for DHS to have the opportunity to review the housing proposal, assess the overall need for the proposed housing and to assist the housing developer to identify applicable local supports.

The following are DHS guidelines for review of applications for supportive housing:

**o Characteristics of the specific target population(s) 1.**

The initial pool of tenants for at least 12 units of housing will be people with developmental and other physical or behavioral disabilities who are eligible for long-term support services and who are referred by the Dane County Aging and Disability Resource Center, Dane County Department of Human Services (or their successor family care agencies), affiliated care managers, and affiliated supportive service providers serving qualified recipients of long term care living in Dane County and/or households that include one or more household members who are military veterans, are eligible for supportive services and who are referred by Dane County Veterans Services Office or affiliated veterans' supportive services providers serving qualified recipients of veterans' services in Dane County.

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

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

In planning this project we worked with the long term care and veterans service systems to confirm that there is need and demand for the proposed housing. This demand is further evidenced by the third-party market study commissioned for the project. This type of housing is fully consistent with federal, state and local policies regarding the development of supported housing as it is integrated into the community, does not require acceptance of supportive services but is coordinated with these services systems. It will not be owned or operated by business interests who provide direct supportive services; this provides a separation between housing and services. This arrangement provides for more stable housing by allowing the tenants to have a choice

of services and more control over their living environment. The housing will not require licensure. The supportive units are integrated among the balance of units offering true community integrated housing which is the strong preference of people who rely on long term support and/or are military veterans.

**o Evidence of outreach activities and engagement with local collaborative long term support partners specifically to reach target population.**

The attached Agreement Letter from Dane County ADRC and MOU's from the Dane County Department of Human Services and the Dane County Veterans' Service Office provide evidence of local collaboration between Movin' Out, this project and the long term support system for people relying on the long term care system and the veterans' supportive services system in Dane County. Additionally Movin' Out has a long established network with these systems and a wide range of supportive service providers that are part of those systems. Movin' Out will work with that network to help coordinate services and assist these households to maintain tenancy in the project.

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

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

ACC Management will be providing professional property management and will be responsible for making final eligibility determinations and for all income and disability verifications as required and will maintain and provide all required reporting information. Below is a brief description of the criteria they will use:

*All supportive housing units will be marketed affirmatively. While most housing leads will come from Movin Out, other agencies specializing in assisting those with a permanent disability and veterans needing supportive services will also be contacted in the event of an unfilled vacancy. The local Section 8 office will also be made aware of any unfilled vacancies.*

*While the screening criteria will be the same for all of our applicants, we do have an exception policy that will ease the constraints of the screening criteria. Very often, due to income or past eviction issues, applicants will need to secure a qualified cosigner to be eligible for housing. A detailed description of the tenant screening policy is included at the end of this section.*

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

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

If ACC receives a prospect who may qualify for one of the supportive housing units they will refer them to Movin' Out for initial eligibility screening. The waiting list policy for the Supported Housing Units used by ACC for the project is:

*The waiting list protocol will maintain a chronological list on a first-come first-served basis. It is the policy of ACC to maintain waiting lists for any interested parties. These leads may come from the supportive service provider, any other social service agencies / providers, or as a result of our affirmative marketing. These waiting lists consist of names, eligibility/preference details and contact information. Interested parties do not have to fill out an application or be screened to be on the waiting list.*

*In addition to typical eligibility content (such as income and student status), the supportive housing needs of the applicant will also be listed. Those needing supportive services will be placed on a "Supportive Housing" waiting list. All supportive housing prospects will be considered a preference for any supportive units that come available*

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

Movin' Out does not provide any type of personal care, residential case management, health care, or other typical direct service care provided by human services agencies,

Movin' Out does provide housing counseling to households that include a family member with a permanent disability and to eligible veteran households. This counseling is designed to assist these households to evaluate their housing situation and establish a future housing plan. Often these plans need to account for not only typical housing issues such as household income and credit worthiness but also considers supportive service/ long term needs, transportation, employment, household composition, accessibility requirements and a number of other issues often faced by people with permanent disabilities and veteran families. These plans may lead to eventual home ownership, long-term tenancy in rental housing, or other stable, affordable, and integrated housing solution.

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

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

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

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

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

- Tenants with disabilities or who are veterans need individualized in-home support services available on a regularly scheduled basis and on short notice, when needed. The supportive services providers offer needed support, available in tenants' homes, to maintain good nutrition, hygiene and health, manage budgets and bills, establish a domestic routine, establish a safe environment and safe practices, provide quick response to emergencies, help to maintain good relationships with housemates and neighbors, monitor and dispense medication, help in figuring out how to get to work and social destinations using public transportation, and coordination of domestic routines and schedules to insure people get to work, appointments, and other commitments on time and prepared.
- Tenants with disabilities and veterans need to feel a sense of belonging and membership. The supportive service providers offer assistance in initiating and maintaining constructive relationships with housemates, neighbors, resident association members, friends, co-workers, and family members.
- Tenants with disabilities or veterans may need support in exercising responsibility, making choices, and providing direction and decision-making in developing and implementing a service plan that reflects one's own needs and preferences. The supportive service providers offer to facilitate the tenants' engagement in decisions about their housing and will coordinate with tenants' guardians, care managers, Movin' Out, and ACC - the designated property management company.

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

- Staff support tenants in their homes to ensure safety and provide supervision as needed. Amounts of support range from 24 hours per day to come-in support a few hours each day or week.

- **Autonomy and Choice:** the supportive services providers chosen by tenants will ensure that individuals have choice about where and with whom they live, how personal time is used and what services are received.
- **Relationships/Community Involvement:** the supportive services provider will assist with opportunities to develop and maintain relationships with friends, family and community members. Individuals will have opportunities to participate in community life and will get help in coordinating plans, help with maintaining relationships with friends and neighbors, and coordination of transportation, as needed, to get to the right place at the right time.
- **Organization/communication:** the supportive services provider staff will work cooperatively with each individual to plan and organize their daily routine, including coordinating transportation, special events, communicating as needed with other service providers, support brokers and family members.
- **Medication assistance and medical advocacy:** Staff will assist each person, as needed, with medication administration, ensuring accuracy and consistency of needed medications. Staff will work with the individuals and their teams to ensure medical appointments are attended, when necessary, and that any medical issues that arise are addressed promptly and appropriately. Staff will monitor the need for follow up appointments and maintain documentation of medical history.
- **Personal Care:** Staff will assist the individuals with personal care including bathing, hair care, tooth brushing, toileting, dressing, care of eyeglasses/hearing aids, assistance with mobility/ambulation, skin care, use of assistive devices and any other assistance necessary.
- **Home maintenance:** Staff will facilitate home maintenance including assuring all areas of the apartments are clean, organizing, laundry, and maintaining a safe home environment.
- **Meal Planning/Groceries:** The supportive services provider will assist with meal planning, nutrition education and grocery shopping for each individual. This may include planning weekly menus, making grocery store lists, providing transportation to the grocery store and assistance with purchasing groceries. Supportive services will also include education and/or guidance around special dietary and healthy eating.

- Financial support: The supportive services provider will arrange fiscal assistance to assure the person's funds are deposited and rent and other bills are timely paid. The residential supportive services provider will work cooperatively with each individual's representative payee to ensure they are maintaining benefit eligibility and to meet any other financial obligations.

<sup>1</sup> Target Population(s) may include, for example: People who have permanent developmental, physical, sensory, medical or mental health disabilities, or a combination of impairments that make them eligible for long term care services.

<sup>2</sup> Examples of local collaborative long term support partners include: Aging and Disability Resource Centers serving each Wisconsin County, Managed Care Organizations operating Family Care, Family Care Partnership or PACE, and County Human Services Agencies or Departments of Community Programs.

## 8th Street Apartments Housing Plan for Tenants with Special Needs

### Memorandum of Understanding

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

#### Services Offered:

1. Movin' Out will reserve up to 12 of 59 units of the residential rental units in its 8th Street Apartment development in Stoughton for tenant households that include at least one tenant with disabilities who relies on supportive services planned and funded by Dane County's administrator of long term support services. Movin' Out commits to accommodate the delivery of supportive services for the life of the project.
2. The initial pool of tenants for up to 25% of the units will be people with cognitive, mental, behavioral, and physical disabilities who are eligible for long-term support services and who are referred by Dane County, support brokers / case managers, and affiliated supportive service providers serving eligible members of long term care who live in Dane County. Final determination of who will be selected as initial tenants will be made by Movin' Out or the professional property management company designated by Movin' Out, with recommendations from Dane County and its support brokers / case managers.
3. Movin' Out will provide services and amenities to meet the following needs of tenants who rely on supportive services:
  - a. Tenants with disabilities need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable, subject to compliance with lease terms.
  - b. Tenants need housing that complements their goals for economic self-sufficiency. Movin' Out will design units to be functional as live/work units and will provide an enhanced business/community center available to tenants to conduct meetings and carry out activities to engage in job-related activity, career development, and financial literacy. Movin' Out will collaborate with supported housing tenants whose economic self-sufficiency goals include development and operation of tailored micro-enterprises.
  - c. Tenants with disabilities need affordable housing: Movin' Out provides decent shelter at a rent affordable to tenants on a fixed income. The owner's non-profit status and the sources of development funding assure continuous affordability for qualified tenants in 50 units, 12 of which will be supported housing units.
  - d. Tenants with disabilities need disability-sensitive property management. Movin' Out's property management is tailored to tenants whose disabilities may require individualized accommodations. Property management will coordinate with and complement day to day supportive services.
  - e. Tenants with disabilities need ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens. Movin' Out will develop housing units built to accommodate the specific needs and preferences of the tenants. The housing will not be burdened with licensing required by congregate facilities, thus allowing the tenants to be seen and known as ordinary neighbors.
4. For as long as Dane County administers long term support services it will offer comprehensive, active, and frequent case management and mental and behavioral health services to meet the following needs of tenants who rely on supportive services:

- a. Tenants with disabilities need individualized in-home support services available on a regularly scheduled basis and on short notice, when needed. Dane County offers needed support, available in tenants' homes, to maintain good nutrition, hygiene and health, manage budgets and bills, establish a domestic routine, establish a safe environment and safe practices, provide quick response to emergencies, help to maintain good relationships with housemates and neighbors, monitor and dispense medication, help in figuring out how to get to work and social destinations using public transportation, and coordination of domestic routines and schedules to insure people get to work, appointments, and other commitments on time and prepared.
  - b. Tenants with disabilities need to feel a sense of belonging and membership. Dane County offers assistance in initiating and maintaining constructive relationships with housemates, neighbors, resident association members, friends, co-workers, and family members.
  - c. Tenants with disabilities may need support in exercising responsibility, making choices, and providing direction and decision-making in developing and implementing a service plan that reflects one's own needs and preferences. Dane County offers to facilitate the tenants' engagement in decisions about their housing and will coordinate with tenants' guardians, case managers, Movin' Out, and its designated property management company.
5. For as long as Dane County administers long term support services, it will meet the needs and preferences of tenants by providing day to day mental and behavioral supportive services. The tenants designated for supportive services will have individualized support plans. Services are determined based on the needs and desires of each person and their support team. Individuals have the right to direct their own lives, including choosing their caregivers and service providers. For the purpose of this project, prospective residents will be provided the following supports:
  - Financial and economic stability: Dane County will assess needs, preference, and aptitudes for increasing economic self-sufficiency. Dane County members may be eligible for vocational services or adult day services administered by the managed care organization. Employment and career counseling will provide planning assistance in achieving employment by connecting enrolled members to community resources, providing career exploration, and performing informational interviewing with professionals and employers. Vocational services will address barriers to employment by connecting tenants to a Benefits Specialist who will explain how employment will affect benefits and what work incentives are available. Members have access to assistive technology consultation. Assistive technology services can help a person with a disability in the selection, purchase, and/or use of tools designed to make his or her life easier or more independent. Financial literacy training will be available to increase understanding and build good practices in handling money and credit. Financial literacy training will include an emphasis on understanding of credit, loans, and insurance. Other topics will include risks and identifying credit scams and predatory lending practices.
  - Staff support tenants in their homes and remotely to ensure safety and provide supervision as needed. Amounts of support range from the potential for 24 hours per day in some instances to come-in support a few hours each day or week.
  - Autonomy and Choice: the supportive services providers chosen by tenants will ensure that individuals have choice about where and with whom they live, how personal time is used and what services are received.
  - Relationships/Community Involvement: the supportive services provider will assist with opportunities to develop and maintain relationships with friends, family and community members. Individuals will have opportunities to participate in community life and will get help in coordinating

plans, help with maintaining relationships with friends and neighbors, and coordination of transportation, as needed, to get to the right place at the right time.

- Organization/communication: the supportive services provider staff will work cooperatively with each individual to plan and organize their daily routine, including coordinating transportation, special events, communicating as needed with other service providers, care management team, and family members.
- Medication assistance and medical advocacy: Staff will assist each person, as needed, with medication administration, ensuring accuracy and consistency of needed medications. Staff will also attend medical appointments to assist individuals with communicating with medical providers and advocating on their behalf. Staff will work with the individuals and their teams to ensure medical appointments are attended, when necessary, and that any medical issues that arise are attended to promptly and appropriately. Staff will monitor the need for follow up appointments and maintain documentation of medical history.
- Personal Care: Staff will assist the individuals with personal care including: bathing, hair care, tooth brushing, toileting, dressing, care of eyeglasses/hearing aids, assistance with mobility/ambulation, skin care, use of assistive devices and other necessary assistance.
- Home maintenance: Staff will assist, to the degree necessary, with home maintenance including cleaning all areas of the apartments, organizing, laundry, and maintaining a safe home environment.
- Meal Planning/Groceries: The supportive services provider will assist with meal planning, nutrition education and grocery shopping for each individual, as needed. This may include planning weekly menus, making grocery store lists, providing transportation to the grocery store and assistance with purchasing groceries. Supportive services may also include education and/or guidance around special dietary requirements (e.g., diabetic diet) and healthy eating.

### **How Services will be Planned and Funded**

A state-mandated shift in the administration of Medicaid funded, long-term support is underway. Once administration responsibilities transfer from Dane County to a managed care entity, the people with disabilities that meet current program criteria are very likely to meet the eligibility criteria of the new system. This MOU reflects Dane County's practices for as long as Dane County maintains responsibility for administering long term support.

The proposed tenants receive comprehensive, self-directed, community-based supportive services funded and administered by the Adult Community Services Division of the Dane County Department of Human Services (ACS). Service planning and coordination is undertaken by ACS and its affiliated support brokers and service providers. Each tenant has a support broker who assists the tenant in creating a service plan and budget, identifying service providers, and monitoring and documenting the quality of support delivered. Participants have a range of supportive service providers capable of planning and providing individualized services.

The initial tenants have access to support brokers who help to identify and coordinate supports within the supportive service funding available to the person. The support broker assists the person in developing an individualized person-centered plan. Tenants may choose a support broker from among the support broker agencies that contract with Dane County Department of Human Services.

The initial tenants are expected to be eligible for supportive services funded by Medicaid waiver and other programs currently administered by the Adult Community Services Division of Dane County Department of Human. Prospective tenants may choose to affiliate with a county-approved agency that meets the county's contractual

requirements. The initial tenants are expected to be eligible for vocational services or adult day services administered by the Adult Community Services Division of the Dane County Department of Human Services.

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

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

**For Dane County Department of Human Services:**

*Monica Bear*

\_\_\_\_\_  
Monica Bear, Community Services Manager

\_\_\_\_\_  
4-21-2017

Date

**For Movin' Out, Inc.:**

*Tim Radelet*

\_\_\_\_\_  
Tim Radelet, Executive Director

\_\_\_\_\_  
5-1-17

Date



## Dane County Department of Human Services Division of Adult Community Services

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Director – Lynn Green  
Division Administrator - Fran Genter

JOE PARISI  
DANE COUNTY EXECUTIVE

April 21, 2017

Mr. Tim Radelet, Executive Director  
Movin' Out, Inc.  
902 Royster Oaks Drive  
Suite 105  
Madison, WI 53714-9101

Dear Tim,

I have reviewed the description of the 8th Street Apartments development and the related Service Plan and am pleased to endorse and support this project that will include affordable housing and tailored community support services to individuals with disabilities eligible for services administered by Dane County Department of Human Services.

On behalf of the Department, I can affirm the need for supportive housing that this development project will address. The housing to be provided and the service plan are consistent with Dane County's policies and plans, as well as those of the State of Wisconsin.

Dane County Department of Human Services will continue to fund and administer community-based supportive services to people with disabilities who meet program eligibility criteria until a state mandated shift of administration to a managed care entity occurs. The people with disabilities that meet current program criteria are very likely to meet the eligibility criteria of the new system and receive a similar array of supports.

Dane County Department of Human Services funds a variety of supportive services agencies on an ongoing basis to provide comprehensive and tailored supportive services to enable people with disabilities to be healthy, safe and successful tenants and members of the community. Dane County also contracts with Movin' Out to provide individualized housing counseling to people with disabilities. The counseling, individualized housing planning, and information delivered to people with disabilities are designed to augment and strengthen supportive services delivered by supportive service agencies. This housing counseling will be an element of the support available to the tenants of supportive housing located at Madison on Broadway Apartments.

Sincerely,

Monica Bear  
Developmental Disabilities Community Service Manager



DANE COUNTY EXECUTIVE – Joe Parisi  
DEPARTMENT DIRECTOR – Lynn Green  
DIVISION ADMINISTRATOR – Vacant  
ADRC MANAGER – Jennifer Fischer

RE: Wilcox Place  
Stoughton, Wisconsin

Movin' Out, Inc. is the developer/ owner of the subject proposed 50-unit development. The Aging and Disability Resource Center (ADRC) of Dane County supports the need for more affordable, accessible and integrated housing. Housing is the fourth highest topic of calls into the ADRC of Dane County. The ADRC agrees to be a resource for people who live in this project which is consistent with the mission of the ADRC should the residents choose to contact us. We also will share information regarding this housing project to people who contact the ADRC. The ADRC strives to work with local partners to connect low income residents with appropriate services and service providers.

The developer/owner is seeking financial support from the Wisconsin Housing and Economic Development Authority, and wishes to establish an area referral network should the building receive funding and eventually constructed.

The proposed project intends to provide 12 supportive housing units at rents affordable to those earning 30% of the area median income.

The target population for the supportive housing units is the general population and veterans who have permanent developmental/intellectual, physical, sensory, medical or mental health disabilities, or a combination of impairments that make them eligible for long term care services.

Should the proposed project be developed, the developer/owner and its property management agent has stated that they will, during lease-up and whenever there is a vacant unit, contact the ADRC and other area local partners asking for referrals from prospective residents who are low income and eligible for long term care assistance. This contact will be likely made by their onsite management agent staff via email or phone.

Developer/owner and its property management agent will establish a waiting list of prospective residents based on referrals described above from the ADRC.

Developer/owner and its property management agent will endeavor to make existing and prospective residents aware of services and resources available by posting brochures about the ADRC of Dane County and other area collaborative partners in building common areas, and will include an ADRC of Dane County brochure at lease signing. The onsite management agent staff will receive training regarding "who and how" to contact ADRC staff to help connect residents to appropriate services.

*2865 N. Sherman Avenue, Madison, WI 53704 (608) 240- 7400 FAX (608) 240-7401*



DANE COUNTY EXECUTIVE – Joe Parisi  
DEPARTMENT DIRECTOR – Lynn Green  
DIVISION ADMINISTRATOR – Vacant  
ADRC MANAGER – Jennifer Fischer

It is my understanding that the proposed project will not provide long term services, nor charge fees related to long term services to residents, but will rather refer residents to the ADRC of Dane County and other are local partners in order that they find services and resources and service providers most appropriate for the residents.

The ADRC of Dane County supports this proposed project, and feel there is a need in Dane County for 12 units of quality affordable supportive housing for persons who have permanent developmental, physical, sensory, medical or mental health disabilities, or a combination of impairments that make them eligible for long term care services.

If you have any further questions, please feel free to contact me.

Sincerely,

A handwritten signature in cursive script that reads 'Jennifer A. Fischer'.

Jennifer A. Fischer, Manager  
ADRC of Dane County

**MEMORANDUM OF UNDERSTANDING**

THIS MEMORANDUM OF UNDERSTANDING (the "MOU") is made this 11th day April of, 2017 (the "Effective Date"), by and between the Dane County Veterans Service Office, and Movin' Out, Inc. ("Developer").

**WITNESSETH**

**WHEREAS**, the Developer is the developer/owner of the subject proposed 34-unit development named Wilcox Place to be located at 524 Eighth Street, Stoughton WI.

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

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

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

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

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

- 1) The proposed project intends to provide 12 supportive housing units at rents affordable to those earning 30% of the area median income. The target population for the supportive housing units is veterans and the general population who have permanent developmental, physical, sensory, medical or mental health disabilities or a combination of impairments that make them eligible for long term care services.
- 2) Should the proposed project be developed, Developer and/or its property management agent will, during lease-up and whenever there is a vacant unit, contact your office and other area local partners asking for referrals of prospective residents who are low income and are veterans. This contact will be made by the Developer or their onsite management agent staff via email or phone.
- 3) The Developer's property management agent will establish a waiting list of prospective residents based on referrals described above.

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

#### **Administrative Provisions**

##### **Duration**

This MOU is subject to the project receiving an award of LIHTC, with operations expected to commence on April 1, 2019. The initial period shall be 12 months from commencement of leasing operations. Either party may terminate this agreement with 30 days' notice at the end of the initial period.

##### **Amendments**

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

##### **Confidentiality**

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

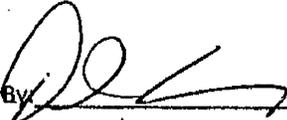
**Nondiscrimination**

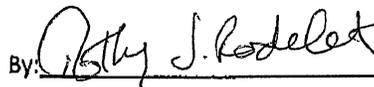
There shall be no discrimination of any person or group of persons on account of race, color, creed, religion, sex, marital status, sexual orientation, age, handicap, ancestry, or national origin in the operation of the project.

**Signatories:**

Dane County Veterans Service Office

Movin' Out, Inc.

By:  \_\_\_\_\_

By:  \_\_\_\_\_

Date: 4/17/2017

Date: 4-17-17

Name: DANIEL A. CONNERY  
Title: VETERANS SERVICE DIRECTOR

Name: Timothy J. Radelet  
Title: Executive Director

**TAB 7**

**Tenant Screening Policies**



## RESIDENT SELECTION CRITERIA

### Section 42 Properties – Effective 04/01/2017

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

#### The Application Process

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

#### Income

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



### Credit Reports & Co-signer Requirements

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

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

### Criminal Report

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

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

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



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

**Occupancy Issues**

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- 31. Maximum occupancy limits are two persons per bedroom unless otherwise specified by local ordinance.
- 32. For the purpose of occupancy limits only, stated in #31 above, minor children under two (2) years of age will not be considered. Once the minor child/children reach the age of two (2) they will be counted towards the occupancy standard. At the end of the household's lease term, following the minor child/children reaching age 2, the household must either transfer to an available unit capable of meeting the occupancy standard of two (2) people per bedroom or vacate the unit.
- 33. For Section 42 income limit calculations, an unborn child or children are counted as household members.
- 34. Age restrictions will apply at senior properties. Verification of age is required per #5 listed above. Ask the community manager for details.

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

If you any concerns about these criteria, please contact:

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

**Applicant Acknowledgement**

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

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



**TAB 8**  
**Funding Leverage**

## Funding Leverage

8th Street Apartments project provides a significant level of funding leverage. Our request to the County is for a total of \$550,000 or \$9,322 per unit in development subsidy. This project leverages a total of \$10,116,563 in additional development funding as identified below.

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

First Mortgage	1,767,065
Contribution of Land – City of Stoughton	600,000
Dane County Home Funds	300,000
TIF – City of Stoughton	324,242
GAP	0
Dane County AHF	550,000
FHLB-AHP	750,000
Deferred Fee	25,017
Tax Credit Equity	6,350,150
<b>Total Sources</b>	<b>10,666,563</b>

The project also has a high level of impact for the surrounding neighborhood by providing new, high quality and well managed housing that will be very affordable to a range of household incomes and family sizes. As described earlier the project is located in the Stoughton Riverfront Redevelopment Area and as such is part of a much larger redevelopment effort by the City which will include additional market-rate housing, commercial/retail space and community green space along the Yahara River.

**TAB 9**  
**REQUIRED FORMS**

**RFP COVER PAGE  
SIGNATURE AFFIDAVIT**

<b>NAME OF FIRM:</b>	Movin' Out, Inc.
<b>STREET ADDRESS:</b>	902 Royster Oaks Drive
<b>CITY, STATE, ZIP</b>	Madison, WI 53714
<b>CONTACT PERSON:</b>	Dave Porterfield
<b>PHONE #:</b>	(608) 251-4446 ext. 8
<b>FAX #:</b>	(608) 819-0623
<b>EMAIL:</b>	<u>dp@movin-out.org</u>

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

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

*Timothy J. Radelet*  
Signature

Executive Director  
Title

Timothy Radelet  
Name (type or print)

5-1-17  
Date

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

Addendum # \_\_\_\_\_ Addendum # \_\_\_\_\_ Addendum # \_\_\_\_\_ Addendum # \_\_\_\_\_

**VENDOR REGISTRATION CERTIFICATION**

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

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

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

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

**CERTIFICATION**

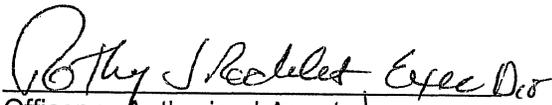
The undersigned, for and on behalf of the **PROPOSER, BIDDER OR APPLICANT** named herein, certifies as follows:

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

Vendor Number # 5470

Paid until May 2018

Date Signed: 5-1-17

  
Officer or Authorized Agent

Movin' Out, Inc.

Business Name

**REFERENCE DATA SHEET**

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for three (3) or more installations/services with requirements similar to those included in this solicitation document

<b>NAME OF FIRM:</b>	City of Stoughton	
<b>STREET ADDRESS:</b>	381 East Main Street	
<b>CITY, STATE, ZIP</b>	Stoughton, WI 53589	
<b>CONTACT PERSON:</b>	Mayor Donna Olson	<b>EMAIL:</b> <a href="mailto:dolson@ci.stoughton.wi.us">dolson@ci.stoughton.wi.us</a>
<b>PHONE #:</b>	(608) 873-6677	<b>FAX #:</b> (608) 873-5519
<b>Product(s) and/or Service(s) Used:</b>	City Government	
<b>NAME OF FIRM:</b>	Foley and Lardner	
<b>STREET ADDRESS:</b>	150 E. Gilman Street	
<b>CITY, STATE, ZIP</b>	Madison, WI 53703	
<b>CONTACT PERSON:</b>	Doug Buck	<b>EMAIL:</b> <a href="mailto:dbuck@foley.com">dbuck@foley.com</a>
<b>PHONE #:</b>	(608) 258-4282	<b>FAX #:</b>
<b>Product(s) and/or Service(s) Used:</b>	Legal Services	
<b>NAME OF FIRM:</b>	Dane County Department of Human Services	
<b>STREET ADDRESS:</b>	1202 Northport Drive	
<b>CITY, STATE, ZIP</b>	Madison, WI 53704	
<b>CONTACT PERSON:</b>	Monica Bear	<b>EMAIL:</b> <a href="mailto:bear@countyofdane.com">bear@countyofdane.com</a>
<b>PHONE #:</b>	(608) 242-6438	<b>FAX #:</b> (608) 242-6531
<b>Product(s) and/or Service(s) Used:</b>	Funder and service provider	

**Designation of Confidential and Proprietary Information**

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

Section	Page Number	Topic

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

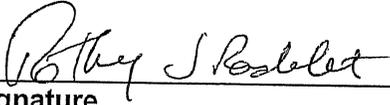
**Prices always become public information when responses are opened, and therefore cannot be designated as confidential.**

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

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

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

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

  
 \_\_\_\_\_  
 Signature

Timothy Radelet  
 Name (type or print)

Executive Director  
 Title

5-1-17  
 Date