DANE COUNTY APPLICATION FOR 2025 AFFORDABLE HOUSING DEVELOPMENT FUND

This application should be used for project seeking Dane County **AHDF funds. Applications must be submitted electronically to DCDHS Division of Housing Access & Affordability by 12:00 p.m. (CST) on August 6, 2025.** Upload application materials to the **Dane County AHDF Dropbox**.

APPLICATION SUMMARY

<table>
<tr><td>ORGANIZATION NAME</td><td colspan="2">DreamLane Real Estate</td></tr>
<tr><td>MAILING ADDRESS

If P.O. Box, include Street Address on second line</td><td colspan="2">1103 Carter Ct, Verona, Wi 53593</td></tr>
<tr><td>TELEPHONE</td><td>608-535-5131</td><td>LEGAL STATUS</td></tr>
<tr><td>FAX NUMBER</td><td></td><td rowspan="5">☐ Private, Non-Profit

☒ Private, For Profit

☐ Other: LLC, LLP, Sole Proprietor

Federal EIN: 82-3738943

Unique Entity Identifier (UEI): WPS7GW7RES63</td></tr>
<tr><td>NAME CHIEF ADMIN/ CONTACT</td><td>Lane Manning</td></tr>
<tr><td>INTERNET WEBSITE (if applicable)</td><td>dreamlanere.com</td></tr>
<tr><td>E-MAIL ADDRESS</td><td>lane@dreamlanere.com</td></tr>
</table>

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

PROJECT NAME	PROJECT CONTACT PERSON	PHONE NUMBER	E-MAIL
United Residences	Lane Manning	6085355131	lane@dreamlanere.co

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

TOTAL PROJECT COST	AMOUNT OF AHDF FUNDS REQUESTED	PECENT OF AHDF FUNDS TO TOTAL PROJECT COST
$28,268,807	$4,000,000	14.14%

Lane Manning

Signature of Chief Elected Official/Organization Head

Principal

Title

Lane Manning

Printed Name

08/04/2025

Date

PROJECT DESCRIPTION

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

Project Name:	United Residences Apartments
Project Address:	709 Northport Dr Lot 1
City, State, Zip:	Madison, Wi 53704
Parcel Number:	251/0809-264-0307-5
Census Tract:	55025002301

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

City of Madison is supportive of the project. Full zoning is in place including conditional use approval and City awarded the project soft funds in 2024. Neighborhood meetings held prior to zoning approvals.

C. **MUNICIPAL PARTNERSHIPS:** Please describe any partner resources the municipality will be dedicating to support your project including but not limited to tax increment financing; reducing or eliminating permitting or impact fees; local housing funds; density bonus; land dedication or reduced land costs, etc.

City of Madison awarded $3,000,000 towards the project from their affordable housing fund. The city will also waive all park fees on the 50% and 30% units. Lastly, the city allowed this development to have reduced parking and increased density.

Is the project eligible for municipal dedicated affordable housing resources (e.g. affordable housing funds)? If not please indicate why the project is not eligible.

yes- see above

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

TRU-1 Zoning allows for residential and our project received conditional use approval. No other city zoning approvals are needed to pull permits.

E. **PROJECT DESCRIPTION**: Provide a detailed description of the project. If the project will preserve an existing low-income housing project, include if the project has, and will continue, to have a rent assistance contract; or if the project includes income and rent-restricted units.

Demand for housing in the city of Madison is very strong. Our Uno project leased up in 2.5 months with many additional applications that we were unable to house.

Dream Lane Real Estate, Northpointe Development, and Cordon Housing Group ("Developer") is proposing to construct the United Residence Apartments, a newly constructed 80-unit Section 42 Low-Income Housing Tax Credit ("LIHTC") multifamily development centrally located at 709 Northport Dr Lot 1 within the City of Madison, Wisconsin. Upon completion, the proposed United Residence Apartments will consist of the new construction of a total of 1, four-story garden style building containing 80 units of Section 42 LIHTC housing. More specifically, the proposed development will include seven studio/one bathroom units (515 square feet), 33, one bedroom/one bathroom units (725 square feet), 21, two bedroom/two bathroom units (1,100 square feet), and 19, three bedroom/two bathroom units (1,400 square feet) for a total of 80 rental units targeting residents of all ages. The Developer proposes to set aside all of the units for residents earning 30, 50, or 80 percent or less of the Dane County Area Median Income ("AMI") using the Wisconsin Housing and Economic Development Authority ("WHEDA") LIHTC Program targeting residents of all ages. The proposed site is located on the northeast side of the City of Madison, Wisconsin, just northwest of the intersection of Warner Park and the "Duck Pond". More specifically, the subject site is located on the west side of Hwy 113 at 709 Northport Dr. Northport Dr (Hwy 113) is a heavily traveled north/south roadway providing access to South Gammon Road approximately 7.2 miles to the southwest.

In addition, the subject site is located approximately 6.7 miles northwest of the downtown area of the City of Madison and approximately 6.6 miles south of the downtown area of the City of Waunakee. The subject site is level in topography and generally rectangular and shape. The general uses of surrounding the site consists primarily of residential uses as well as a larger shopping center located to the southwest of the subject development. Other uses surrounding the general area of the subject site include an area designated for youth athletic fields, lake access, and convenient access to all forms of transportation.

The units will include a washer/dryer, solid surface countertops, stainless steel appliance, and LVP flooring. The project will be designed to LEED Silver and LEED Zero Energy Standards. We are planning to have a 120 KW PV Solar System on the roof of the building to eliminate approximatley 90% of the buildings common area electrical usage.

The development will also be providing case management and service coordination to our tenants.

Northside Christian Assembly currenlty owns this site which is has been deemed a TOD area of the city as it will be along the BRT line. As the site is currenlty owned by a church, the site currenly doesn't generate real estate taxes. Besides the benefit of quality and sustainable affordable housing, the project will generate a significant tax base. This project will also act as a catalyst for other development on the site including a 24-unit senior affordable housing project and 6-8 townhomes that will be owner occupied (to be developed by others). Also, we are partnering with the Church who will remain a keystone of the neighborhood. The Church will continue to provide worship services but also intends to provide supportive services to their congreation as well as other members of the neighborhood. Lastly, the project is partnering with LSS to house and provide services to those that are currenlty homeless or at risk of homelessness.

50% of the units will either be ADA Type A units or convertible to Type A units.

What is the proposed affordability period for the affordability period for the project?

Permanent Affordablity

F. **RELOCATION**: Will any businesses, including churches and non-profits, or residential tenants (owner or rental) be displaced temporarily or permanently? If so, please describe the relocation requirements, relocation plan, and relocation assistance that you will implement or have started to implement.

No

G. **CAPITAL NEEDS**: For projects that include rehabilitation, have you completed a capital needs assessment for this property? If so, summarize the scope and cost; and attach a copy of the capital needs assessment.

N/A

H. **GREEN TECHNOLOGIES/SUSTAINABILITY:** Indicate if the project will be pursuing any of the listed energy and sustainability standards, beyond the minimum detailed in the 2025 Affordable Housing Development Fund Guidelines.

Yes	No
☒	☐

If yes, indicate which certification will be pursued:

Tier 1	
New Construction	
☐	Enterprise 2020 Green Communities Certification Plus
☐	LEED Gold/Platinum Certification
☐	Wisconsin Green Built Communities Gold Plus
☐	Passive House Institute US PHIUS Core.
Rehabilitation	
☐	Enterprise 2020 Green Communities for Moderate & Substantial Rehab Certification Plus
☐	Wisconsin Green Build Homes Gold Plus
☐	Passive House Institute US – PHIUS Core Revive
	Tier 2- Net Zero Certification
	New Construction
☐	Enterprise 2020 Green Communities Criteria Certification Plus via Criterion 5.4b
☒	LEED Zero Energy
☐	Wisconsin Green Built Communities Gold Net Zero
☐	Passive House Institute US PHIUS Zero
	Rehabilitation
☐	Enterprise 2020 Green Communities for Moderate & Substantial Rehab Certification Plus via Criterion 5.2b
☐	Wisconsin Green Built Homes Gold Net Zero
☐	Passive House Institute US – PHIUS Core Zero Revive

If a project has selected a Tier 2 – Net Zero certification, please detail how the project will achieve the certification, including impacts on financing and timeline.

The project team is committed to achieve LEED Silver certification towards meeting threshold certification; and achieve LEED Zero Energy certification towards meeting the Stretch Goal – Net Zero certification.

LEED Silver certification will be achieved by improving the building overall in all environmental impact areas. The LEED Residential program provides the framework to enhance green features in the building in the following categories: Location and Site Selection; Sustainable Site Landscape and Storm Water Management; Water Efficiency; Energy Efficiency; Sustainable Materials and Resources; and Indoor Air Quality. All of the abovementioned areas will be optimized to meet minimum requirements and exceed the requirements to achieve at least 50 credits necessary for LEED Silver certification. Based on our experience, the building systems employed in other Northpointe projects generally meet and exceed LEED and Energy Star building standards. The total soft cost for LEED certification will be in the range of $35,000. This includes LEED registration & certification fees, and related consulting, energy modeling, on-site verification and performance testing services.

The LEED Zero Energy certification will follow after LEED Residential certification which is a minimum prerequisite for achieving the LEED Zero Energy certification. The LEED Zero Energy program requires achieving Net Zero goal by first optimizing the energy performance of the building through the LEED certification; if feasible adding renewable energy to further offset energy use; and finally, the residual energy use of the building can be offset by purchasing renewable energy credits or carbon offsets. Once the project is placed in service, we will tract the energy usage for 1 year. The purchase of credits occurs based on the actual energy use after one year of occupancy. The total soft cost for LEED Zero Energy certification will be in the range of $25,000. This includes LEED Zero Energy registration fees, related energy analysis, management and purchase of Renewable Energy Credits.

I. **WORK PLAN WITH TIMELINE AND MILESTONES:** In the space below, provide a work plan for how the project will be organized, implemented, and administered. Include a timeline and accomplishments from initiation through project completion. Add in extra quarters as needed. Examples of milestones are: zoning approval, acquisition, bid packages released, bids awarded, site preparation, excavation, construction begins, substantial completion, certificate of occupancy, lease-up begins, etc.

ON OR BEFORE	MILESTONES
July 2025	Apply for WHEDA Tax Credits
November 2025	Complete Equity and Debt Financing
December 2025	Acquistion/Real Estate Closing
January 2026	Rehab Or New Construction Bid Publishing
March 2026	New Construction/Reharb Start
January 2027	Begin Lease-Up/Marketing
May 2027	New Construction/Rehab Complete
May 2027	Certificates(s) of Occupancy Obtained
December 2027	Complete Lease-Up
July 2027	Request Final AHF Draw

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

ADDRESS #1:	709 Northport Dr Lot 1, Madison, Wi										
	# of Bedrooms						Projected Monthly Unit, including Utilities				
% of County Median Income (CMI)	**Total # of Units**	**# of Studios**	**# of 1 BRs**	**# of 2 BRs**	**# of 3 BRs**	**# of 4+ BRs**	**$ Rent for Studios**	**$ Rent for 1 BRs**	**$ Rent for 2 BRs**	**$ Rent for 3 BRs**	**$ Rent for 4+ BRs**
≤30%	16	5	5	4	2		643	709	852	985	0
40%	0	0	0	0	0	0	0	0	0	0	0
50%	32	1	15	8	8	0	1070	1152	1393	1607	0
60%	0	0	0	0	0	0	0	0	0	0	0
80%	32	1	13	9	9	0	1245	1448	1718	2082	0
Affordable Sub total	80	7	33	21	19	0					0
Market											
Total Units	80	7	33	17	19	0	Notes:	Heat, Water, Trash, sewer, included			

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

ADDRESS #2:	709 Northport Dr, Madison, Wi										
	# of Bedrooms						Projected Monthly Unit, including Utilities				
% of County Median Income (CMI)	**Total # of Units**	**# of Studios**	**# of 1 BRs**	**# of 2 BRs**	**# of 3 BRs**	**# of 4+ BRs**	**$ Rent for Studios**	**$ Rent for 1 BRs**	**$ Rent for 2 BRs**	**$ Rent for 3 BRs**	**$ Rent for 4+ BRs**
≤30%											
40%											
50%											
60%											
80%											
Affordable Sub total											
Market											
Total Units							Notes:				

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

What percentage of maximum LIHTC rents are used for 50, 60, and 80% units? Describe the project's policy toward limiting rent increases for lease renewals? How will the project ensure long-term tenants are protected from significantly rising rent increases that may be allowed under published rent limits?

there are 48 units at or below 50% CMI
50% or below- 60% of total units
60% 0% of total units
80% 40% of total units

50% units typically are rented at or near the rent limit given the significant discount to market.
60%- N/A
80% units will be rented well below the rent limit.

The rent increase at lease renewal is reviewed annually. Multiple factors are taken into consideration when setting renewal rates including, comparable rents, the published rent limits, anticipated property expenses, vacancy percentage, and more. Often times, the renewal rents for existing tenants are set at a rate lower than the published rent limit and lower than the listed rent for an identical vacant unit in the building. In no case will a rental renewal be for more than 2% as required by the City of Madison

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

☐	Community Building, square feet:
☒	Community Room, square feet: 3000 including exercise room
☐	Garages, number: and monthly rent:
☒	Surface parking, number: 80 and monthly rent: 0
☒	Underground parking, number 80 and monthly rent: $0

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

The unit will have LVP flooring, solid surface countertops, stainless steel appliances, washer and dryer included, balconies, and internet fiber direclty installed to the units. The building will be non-smoking. The units are sized appropriately and will have the proper number of bathrooms in the unit (ie two-
bedrooms and three bedrooms will have at least two bathrooms.) The building will built to EPA indoor Air Plus standards meaning fresh air will always be circulated in the common areas and unit kitchen and bath fans will continuously cirrculate air to the outside of the unit. The project will have a roof-top community space, childrens play room, supportive service office, rental office, excersise room, and a large community patio with playground equipment and grilling stations.

LOCATION

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

The site will offer an opportunity to utilize Northside Christian Assembly and all the programming they offer. Additionally, the apartment building will have underground parking. There will also be outdoor amenities including an outdoor patio with picnic area. There is large park/ play area adjacent to the site and an Elemenatry School around the corner. There is a daycare next door to the site. The property manager will cordinate onsite activites. An MOU has been signed with LSS to provide a service coordinator at the project to work with all tenants but especially the supportive housing target population. Another MOU has been signed with Dane County Vets office to provider services to the Vet households. The site is located on the BRT line and will also offer B-Cycle E bikes.

Identify the distance the following amenities are from the proposed site.

Type of Amenities & Services	**Name of Facility**	**Distance from Site**
Full-Service Grocery Store	Wiley Street Co-op	1.31 mi
Public Elementary School	Mendota Elementary School	.25 mi
Public Middle School	BlackHawk Middle School	1.47 mi
Public High School	Madison East High School	3.1 mi

Job-Training Facility, Community College, or Continuing Education Programs	Madison Area Technical College	2.63 mi
Childcare	Northside Kindr Care	1.63 mi
Public Library	Madison Public Library - Lakeview	1.3 mi
Neighborhood, Community, or Senior Center	Kennedy Heights Community Center,	.25 mi
Full Service Medical Clinic or Hospital	UW Health East Madison Hospital	4.2 mi
Pharmacy	Walgreens	1.3 mi
Public Park or Hiking/Biking Trails	Warner Park	.35 mi
Banking	UWCU	.35 mi
Retail	Beef Butter Plaza	1.24 mi
Other (list the amenities)	B-cycle station at Warner Park	.35

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

Several stations are located near the site with the closest one being at School RD approximately 300 ft away from the site. The B, L, And D2 lines all run and have stops at several sites within walking distance of the proposed site. The site is also located on the BRT Line. Madison metro charges $28/ month to low-income individuals for a bus pass and $1/ ride for senior citizens. The site has easy access to the Beltline which allows tenants easy access to Madison or Middleton job centers. There are also a significant number of jobs within walking distance. Auto transportation will be less than $1/ day for those who will work in Madison. Downtown Madison is approximately 5 miles away meaning it would cost about 1-2 dollars in gas to get downtown and home daily. We have been working with Bcycle to provide Ebike stations and bikes at our Dane County affordable housing projects. Memberships will be provided to tenants at no cost. The Ebikes will increase transportation and leisure opportunites for our tenants.

O. **TENANT ACCESS TO PROPERTY MANAGEMENT:** Describe access to property management staff on site (e.g., include anticipated office hours of property management, if staff will live on-site.)

Property Management staff will be on site and avaliable -in a dedicated office- Monday through Friday approximately from 9am-4pm.

P. **ALTERNATIVES TO EVICTION:** Describe the project's approach to successfully utilizing alternatives to eviction, both pre- and-post filing, such as payment plans, mediations, etc. to avoid evictions.

Eviction is the last option. If a resident becomes delinquent on rent, a legal notice is issued. Before, during, and after the timeframe of the legal notice, on-site management engages in discussion with the resident regarding the unpaid balance to encourage the resident to pay the balance or seek other resources, often times available rental assistance from local organizations. It is common to work with a resident and the agency over a period of a few months to obtain rental assistance for an unpaid balance and a few months of future rent. Management often files for eviction concurrently while engaging in conversation with the resident and working with them to obtain additional resources. This is necessary to provide fiscally responsible management of the property. Most often, the eviction process ends short of eviction and frequently concludes with a court ordered payment plan. In some cases management will reach out to case managers or supportive service providers to mediate issues.

Q. **LANGUAGE & INFORMATION ACCESS:** Describe project's policy and procedures for ensuring services and information will be made available to all applicants and tenants, including those with limited English proficiency and individuals who may have physical, hearing, speech, or visual impairments that require special accommodations.

ACC has Spanish speaking staff members in various area of the company, which has been very helpful as that's the most common second language. Otherwise we will work with our partners to make sure that applicants and tenants have the access that they need.

PROJECT APPROACH

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

-Co- Developer Parnership
Northpointe, Cordon Housing (non-profit) and DreamLane Real Estate Development have teamed up to co-develop the project. DreamLane Real Estate is an emerging Minority owned development firm building capacity in the affordable housing industry and Northpointe is an experience and established affordable housing development firm. Cordon Housing, assuming the role of Non-profit Co-Developer and Co-Owner on the proposed project, is an established, not-for-profit organization, committed to providing stable, affordable housing for low-income and homeless veterans across the Country. Cordon, Northpointe, and Selassie will own 51%, 25%, 24% respectively of the managing member and all will have substantial involvement throughout the entire process including the 15-year compliance period. -

-Supporitive Housing Partners
Northpointe and LSS have a signed MOU service coordination at the site. LSS will coordiante referrals with County, VA and others and provided case management services and service coordination to the tenants Northpointe will sign a MOU with Dane County Veterans Agency to provide referrals, case management, and service coordiation for homeless vets.Northpointe has signed a MOU with Dane County Veterans Agency to provide referrals, case management, and service coordiation for homeless vets. We also intend to work with Joining Forces for Families.

Northside Christian Assembly (seller)
-we are partnering with the Church who will remain a keystone of the neighborhood. The Church will continue to provide worship services but also intends to provide supportive services to their congreation as well as other members of the neighborhood.

Green Initiatives
We've partnered with Focus On energy to povide development design assistance

We've parntered with Sol Consulting to provide testing and verification for our LEED Certifcations We will be working with Madisun and Full Spectrum for our solar system. City assitance We have requested that the city provide affrodable housing funds to our project but they will also waive park fees on all of the 60% and below units. This will save the project approximately $300,000. United Residences has also partnered with local Architects (Knothe and Bruce), Engineers (Vierbicher), GC (Connery), Property Manager (ACC), and Council (Reinhart). All have significant experience in the Dane County Market and LIHTC development.

S. **VOUCHER HOLDER ACCESS:** Will the project commit to lowering rent on units affordable to households at 60% AMI to meet public housing authority payment standards for otherwise eligible applicants who are voucher holders?

Yes	No
☒	☐

T. **FAIR TENANT SELECTION CRITERIA**: Will the project incorporate tenant selection criteria detailed below? **Acceptance of all criteria is required for funding.**

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

	Yes	No	
All REQUIRED FOR FUNDING	☒	☐	Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months
	☒	☐	Lack of housing history
	☒	☐	Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located.
	☒	☐	Wisconsin Circuit Court Access records
	☒	☐	Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water).
	☒	☐	Credit score
	☒	☐	Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations.
	☒	☐	Owing money to a prior landlord or negative rent payment history if the tenant's housing and utility costs were more than 50% of their monthly income.
	☒	☐	Owing money to a prior landlord or negative rent or utility payment history if applicant does one of the following: (1) establishes a regular record of repayment of the obligation; 2) signs up for automatic payment of rent to the housing provider; or (3) obtains a representative payee.
	☒	☐	Any eviction filing if meets any of the following: (1) eviction filing was dismissed or resulted in a judgement in favor of the applicant; (2) eviction filing which was settled with no judgement or write of recovery issued (e.g. stipulated dismissal); or (3) eviction filing that resulted in judgement for the landlord more than two years before the applicant submits the application.
	☒	☐	Criminal activity, except: (i) a criminal conviction within the last two years for violent criminal activity or drug related criminal activity resulting in a criminal conviction, and (ii) if the program or project is federally assisted, criminal activity for which federal law currently requires denial. (*Violent criminal activity* is defined in 24 C.F.R

			§ 5.100 and means any criminal activity that has as one of its elements the use, attempted use, or threatened use of physical force substantial enough to cause, or be reasonably likely to cause, serious bodily injury or property damage. “Drug related criminal activity is defined in Wis. Stat. s. 704.17(3m)(a)(2). “Drug-related criminal activity” means criminal activity that involves the manufacture or distribution of a controlled substance. “Drug-related criminal activity” does not include the manufacture, possession, or use of a controlled substance that is prescribed by a physician for the use of by a disabled person, as defined in s. 100.264(1)(a), and manufactured by, used, by or in the possession of the disabled person or in the possession of the disabled person’s personal care worker or other caregiver.)

U. **DENIAL PROCESS**: Will the project incorporate the denial process detailed below? **Acceptance is required for funding.**

Yes	No
☒	☐

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

	d) Notice of the right to request an in-person appeal meeting on the denial decision by making a written request for a hearing within 45 days. The housing provider is not required to hold the unit open while the appeal is pending. e) Notice of the right to have an advocate present at the in-person appeal meeting and of the right to be represented by an attorney or other representative. f) Notice of the right to present evidence in support of their application, including, but not limited to evidence related to the applicant's completion or participation in a rehabilitation program, behavioral health treatment, or other supportive services.
6.	If the applicant requests an in-person appeal meeting, the hearing will be conducted by a person who was not involved in or consulted in making the decision to deny the application nor a subordinate of such a person so involved.
7.	The in-person appeal meeting shall be scheduled within ten working days of the request, unless the applicant requests a later date.
8.	A written decision on the application shall be provided to the applicant within ten working days after the in-person appeal meeting.

V. **TENANCY ADDENDUM:** Affirm the project will include the following provisions within all tenant leases or as an addendum to all tenant leases? **This is required to be eligible for project funding.**

Yes	No
☒	☐

a.	**Security Deposits.** The amount of a security deposit shall not be more than one month's rent.
b.	**Late Fees and Other Fees.** Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent.
c.	**All other fees.** All other fees must be directly related to the cost for a specific amenity or service provided to the tenant and comply with all applicable laws. Non-essential services must be transparently identified, and allow tenant to opt out of services if tenant chooses. Junk fees are prohibited and defined as unnecessary, deceptive, or poorly disclosed charges not tied to a legitimate service or cost, and that place an undue burden on tenants. (For example, application fees above $25 dollars pursuant to Wis. Stat. § 704.085, compounding fees, penalty fees, eviction filing fees, attorney's fees, processing fees, convenience fees for payment, pest control fees, insurance fees, administrative fees or any fees that encompass basic tenancy service.)
d.	**Rights of Youth to Access Common Spaces.** Youth under the age of 18 are allow to use and enjoy common areas without supervision. This does not preclude reasonable rules in ensure the safety of children and youth.
e.	**Written Notice for Termination of Tenancy.** Landlord or landlord's agent must serve written notice upon the tenant specifying the grounds (e.g., the dates of relevant event/s, names of parties, reasoning, source of information and relevant documents) for the action at least 30 days before the termination of tenancy, unless shorter timeframe is required by federal funding. Termination for imminent threat of serious physical harm under WI Statute § 704.16(3) and criminal activity under WI Statute § 704.17(3m) are exempted from this requirement.
f.	**Good Cause for Termination.** A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined in include the following: (i) a serious violation of the lease; (ii) repeated minor violations of the lease; or (iii) a refusal to re-certify program eligibility. Repeated means a

	pattern of minor violations, not isolated incidents. Termination notices and procedures shall comply with Chapter 704 of Wisconsin Statutes and federal law, when applicable. Written notice is required for non-renewal and shall include the specific grounds for non-renewal and the right of the tenant to request a meeting to discuss the non-renewal with the landlord or landlord's property management agent within fourteen (14) days of the notice. If requested, the landlord or property management agent will meet with the tenant to discuss the non-renewal, allow the tenant to respond to the alleged grounds for non-renewal, and pursue a mutually acceptable resolution.
g.	**Reasonable Guest Rules.** Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not limited to the following: (1) Prior authorization of guests by the property management, unless the guest is staying for an extended period of time (e.g. more than 2 weeks); (2) Prohibition on overnight guests; (3) Requiring that the resident be with the guest at all times on the property. (4) Requiring guests to show ID unless requested by the tenant. (5) Subjecting caregivers, whether caring for a child or children, or an adult with disabilities, to limitations on the number of days for guests. Landlord may ban a person who is not a tenant from the rental premises if the person has committed violent criminal activity or drug related criminal activity at rental premises. No person shall be banned from the rental premises without the consent of the tenant unless the following have taken place: (1) A notice of the ban is issued to the tenant stating the: (a) name of the person banned, (b) grounds for the ban including, (i) the specific facts detailing the activity resulting in the ban; (ii) the source of the information relied upon in making the ban decision; and (iii) a copy of any criminal record reviewed when making the ban decision; and (c) the right of the tenant to have a meeting to dispute the proposed ban, discuss alternatives to the ban, and address any unintended consequences of the proposed ban. (2) If requested, a hearing on the ban has taken place to provide the tenant an opportunity to dispute the proposed ban, discuss alternatives of the ban, and address any unintended consequences of the proposed ban. A tenant may not invite or allow a banned person as a guest on the premises, provided the Landlord has followed the proper procedure and given notice to Tenant as set forth herein. A tenant who violates the guest policy may be given a written warning detailing the facts of the alleged violation. The written warning shall detail the violation, and warn the tenant that repeated violations may result in termination of tenancy. Tenants that repeatedly violate the guest policy, (e.g. three (3) or more violations within a twelve (12) month period) may be issued a notice of termination in accordance with state and federal law. Nothing in this policy limits a person's right to pursue a civil order for protection against another individual.
h.	**Parking Policies.** Parking policies and practices must comply with applicable laws. Vehicles shall not be towed to a location that is more than 6 miles from the rental premises, unless there is not a towing company with a tow location available within 6 miles.

W. **PARTNERING TO END HOMELESSNESS:** In the space below, indicate the project's willingness to partner with Homeless Services Consortium member agencies and to end homelessness for individuals and /or families by providing a preference for households experiencing homelessness. To be eligible for funding, projects must be willing to target a minimum of 20% of the total project units for referrals from Homeless Services Consortium agencies.

The project is willing to partner with HSC and its housing placement system to end

homelessness for 20% of the total units. The project will also set aside units for families on the community by-name listand follow all Fair Housing laws. The 16 30% units will have a preference for homeless households. We will work with the Homeless Services Consortium to fill all of our 30% set aside units; however, we plan to work with Dane County VA to fill these units as well.

Total # of Project Units	# of Units Targeted to Individuals/Families experiencing homelessness	% of Units Targeted to Individuals/Families experiencing homelessness
80	16	20%

Name of Supportive Services Provider for Coordinated Entry referrals?

Lutheran Social Services

Does identified referral partner have access to Coordinated Entry (CE)? If not, how will CE referrals be made?

Yes

What support will be available to CE referrals during the application process (e.g., transportation to application site, assistance gathering required documents).

Tenants from Coordinated Entry would be provided services based on needs. LSS staff has the experience to provide on-site services in the rapid re-housing range (not a high level of intensity). The preference would be to use a progressive engagement approach to best meet the needs of the individual households. If tenants are not referred by Coordinated Entry and are in the designated units for supportive services, LSS would take the same approach and provide an initial needs assessment and proceed with a progressive engagement approach. Tenants will be connected to LSS services, as well as be referred to other community agencies.

What additional barriers can the project remove to ensure households experiencing homelessness are able to access targeted units (e.g. waiving of screening criteria unrelated to compliance with Section 42 LIHTC program).

We continually engage with our supportive service partners to identify barriers to access and will continue to do so moving forward.

SUPPORTIVE SERVICES:

X. **SUPPORTIVE SERVICES SUMMARY**: Please provide a summary of supportive services below. Subsequent questions will ask for more detailed information:

Supportive Services Partner:	Lutheran Social Services
Total annual budget for supportive services at project:	$40,000
Amount of annual funding **project and/or developer** will provide directly to supportive services at project:	$40,000/year
Full-Time Equivalent position(s) dedicated to providing services at project:	.3 FTE

Number of estimated weekly on-site hours of supportive services provided by identified partner:	12 hrs			
Project will provide on-site services in a dedicated space:	☒	Yes	☐	No

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

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

Please see attached qualification and MOU with LSS for specific details.

Z. Complete the table for supportive units proposed:

	# of Bedrooms					
% of County Median Income (CMI)	**Total # of Units**	**# of Studios**	**# of 1 BRs**	**# of 2 BRs**	**# of 3 BRs**	**# of 4+ BRs**
≤30%	16	5	5	4	2	
40%						
50%	10	1	8	1		
60%						

AA. **PREFERENCES:** Dane County AHDF requires a minimum of 20% of units provide a preference for households experiencing homelessness. Will the project require that these households meet additional preferences? Indicate all anticipated preferences below.

☒	Persons with disabilities	☒	Veterans
☐	Household experiencing chronic homelessness	☐	Individuals recovering from physical abuse, domestic violence, dating violence, sexual assault or stalking
☐	Households who have child welfare or youth justice involvement	☐	Persons with arrest and conviction records
☐	Other:		

If the project will provide a preference for more than one target population, describe the approach that will be taken to apply preferences to tenant selection.

There would not be a ranking in preferece as it has been difficult to fill the 30% units on other suburban projects. We would work with LSS, the County, the VA and others to find members of the qualifing population to fill the units. The 50% units would be preferenced towards Vets, many of which may have VASH Vouchers.

BB. **SCOPE OF SERVICES:** Detail the services that will be provided to tenants and approaches supportive service partner(s) will use to address the needs of tenant population. Indicate if services are targeted only to the supportive housing units, or are available to the broader tenant population.

Lutheran Social Services (LSS) is to provide a variety of supportive services to the targeted residents of the project (though all residents of will be given information on the available services offered by LSS). The housed homeless and homeless veterans, their families and other residents will have access to the help they need through an LSS Service Coordinator who will help to address their specific challenges, and arrange services, so that they may learn the skills necessary to develop and maintain a healthy, stable lifestyle. A designated, on-site, Service Coordinator will be responsible for linking the target population at the site with supportive, medical or advocacy services in the general community for which they are entitled, with a desired outcome of keeping them independent in their units.

CC. **SERVICES STRATEGIES:** Detail strategies the services partner(s) will use to engage tenants to support their housing retention, including tenants who have potential lease violations or whose housing is in jeopardy.

LSS will work with residents to develop an ongoing Supportive Services Plan, based on the needs of each tenant, to ensure the most adequate supportive services are made available to the tenants at the Project. LSS will establish a regular schedule to meet with tenants to ensure introduction to, on-going management of, and completion of supportive services programs. LSS's approach will include ongoing follow-up and case management where needed, to continue engaging tenants. These services may include, but are not limited to, the following: • Completion of an intake assessment by the Service coordinator. It is understood and agreed that the resident has to voluntarily agree to participation in the process. • Development of a case management plan. This plan may include referral to other resources, including, Dane County Department of Health and Human Services, the Aging and Disability Resource Center, workforce development, and other community support. • Coordination of onsite programming and/or workshops to assist residents in overcoming barriers as identified on the tenant assessments. Potential sessions include self-improvement and financial management, and eviction protection. • Collaboration between residents and ACC property management team to create and sustain a stable housing environment. Whether it may be addressing issues and identifying solutions for lease violations, late payments and their corresponding plans, maintenance and repair requests, LSS will work alongside ACC to ensure resident support, property stabilization and most importantly, ensuring housing is retained. Through provision of the wrap around service model, families and individuals at this project will have the tools necessary to strengthen family relations, identify necessary and beneficial resources, and positively impact their length of tenancy in this community. See MOU between ACC, Northpointe, LSS.

DD. **SERVICES STAFF TRAINING:** Detail specific trainings that staff are provided/will be provided and their frequency, in particular, trainings focused on case management basics, community networking, progressive engagement, trauma informed care, harm reduction, de-escalation, and/or trainings related to cultural competency.

LSS values employee development and continued learning within our programs and team members. As an agency, LSS maintains and internal Training Department, responsible for employee onboarding and ongoing training needs. All LSS employees must complete Motivational Interviewing (MI), Trauma Informed Care (TIC), and Person Centered Planning training within their first year of employment, this is conducted by LSS's Training Team, lead by the Training Manager of Evidence Based Practices & Professional Development. In addition, this team provides monthly trainings relevant to the work relevant directly to the Housing Services team. Topics include, crisis management, ethics and boundaries, mental health and aging, transference/countertransference, difficult conversations and conflict, grief, mediation and de-escalation. Refresher trainings in MI, TIC and Person Centered Planning are additionally provided on an ongoing basis. LSS also

maintains a training platform within Essential Learning (Relias Learning). This online database provides many training opportunities for employees as assigned by their supervisor.
Additionally, LSS continually reviews opportunities for external trainings available, within budget limits, applicable to the Service Coordinator's role to provide opportunity for professional development and maintain awareness of local and state resources.

EE. **TENANT ACCESS:** Describe how tenants will access services. For example, will services be on-site at the development in designated space, or by referral to off-site community supports.

LSS Staff will have an office at the apartment community where tenants and families can schedule appointments or drop in for support and services.

LSS staff will have consistent office hours which will be posted in several spots in the apartment complex, including the community room and other common areas. If tenants are unavailable during these times the Service Coordinator can be available for appointments or via phone. .

If services provided are referral to off-site community supports, please detail how tenants will receive information on supportive services that are available to them before and after needs arise:

If a service provider does refer a resident to another organization off-site for resources, residents will be provided referral information in a manner that is clear, informative and accessible. The referral (virtually, flyer, physical card, digital information, etc.) will not only include the support group's name, address, contact person, phone number, email, hours and website, but also will include instructions for accessing such service (how to register or make an appointment, what is needed from resident, how to get there, transportation options, etc.). Referral information will be provided in other languages for limited English proficient individuals and in alternative formats for persons with disabilities. The service coordinator may be able to accompany the resident at their first appointment at the off-site organization to provide support and ensure they feel comfortable. Ongoing case management will ensure residents feels comfortable and capable utilizing off-site community support, leading to better outcomes and better services geared to each individual resident.

FF. **SERVICES SCHEDULE**: Detail the frequency of services provided and/or a proposed schedule of when on-site services are available to tenants (e.g., Monday – Friday, 8:30-4:30 p.m.):

Services will be provided on-site with the schedule yet to be determined. The frequancy is 12 hours per week. Likley 10-2 MWF or something similar.

GG. **SERVICES COLLABORATION:** How will the supportive services partner identify and collaborate with other community service providers in the target area:

With many existing supportive service programs and based on their longstanding reputation as a service provider of choice, their experience level and connectivity, LSS is already very connected with many community service providers in Madison and Dane County. Whether that be through active participation in and attendance at the Dane County Continuum of Care meetings, as well as the Veterans Committee on Homelessness or the existing partnership with the Wisconsin Department of Veterans Affairs, LSS is already collaborating with and utilizing local government agencies and government contacts to gain introductions to other community organizations. LSS will continue to hold regular coordination meetings to discuss ongoing projects, share updates, address challenges and build new relationships with other groups to provide a wholistic supportive service plan that addresses the specific and comprehensive needs of each resident.

HH. **SUPPORTIVE SERVICES FUNDING**: Identify sources that will be used to fund supportive services at the development. Describe funding structure, including annual amounts, and all proposed sources.

☐	Portion of developer fee	☒	Annual Operating Support
☐	Payments out of available cash flow	☐	Other:

The funds for services will be paid from the project's on-going operations.

II. **PERFORMANCE DATA:** Provide relevant performance data that provides insight into the supportive service partner's experience serving the target tenant population(s), and the outcomes for their tenants. Metrics could include the number of individuals served in a related program in a year, housing retention rates for individuals served in that program, connections to employment, etc.

LSS collects data on ongoing basis using a case management database. Currently, LSS has 1,890 residents enrolled in service coordination across 180 apartment communities. In the past 12 months, LSS has provided over 60,708 units of direct service to 3,190 individual residents. Residents enrolled in service coordination maintain their residency at the participating property for an average of 5.3 years. In the last three years, tenants who received a housing lease violation, engaged with LSS's services, had a 90.2% retention rate at the property. In addition, tenants who engaged with LSS services, remained in their unit, on average for 5.3 years. In the last year, LSS has connected over 1083 residents to health care services, 1611 residents to Benefit and/or Entitlement Services, 1371 residents access to food/meals, and 484 residents to education and employment services.

JJ. **PROPERTY MANAGEMENT AND SERVICES PARTNER COLLABORATION**: Describe how the supportive services partner, property manager, and the respondent will work together to ensure the best outcomes for tenants, such as housing retention (e.g. regular meetings between property management staff and supportive services provider to identify potential issues before they rise to the level of a noticed lease violation, joint training on training on trauma informed services or de-escalation). If applicable, provide an example of how this partnership has worked to keep a tenant housed in other developments

Service Coordinator will also work with the Property Management team to identify alternative strategies to avoid a negative outcome with tenants. This would include identifying and coordinating natural and community supports to assist individuals in continuing placement in their residence. In the past when tenant issues has arrised the property manager reached out to the case worker to schedule a meeting to go over the issues and to come up with ways to eliminate those issues.

EXPERIENCE AND QUALIFICATIONS

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

Northpointe Development II Corporation

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

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

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

Multi Family Developments

Project Name	Location	Units	Property Type
Rivers Senior Living	Oshkosh WI	60	New Construction
Bayshore Townhomes	Sparta WI	32	New Construction
Fair Acre Townhomes	Oshkosh WI	55	New Construction
Kenwood Senior Living	Ripon WI	24	New Construction
The Fountains of West Allis	West Allis WI	35	Acquisition/Rehab
Oconomowoc School Apts	Oconomowoc WI	55	Adaptive Reuse
Nicolet Townhomes	De Pere WI	60	New Construction
Anthem Luxury Living	Oshkosh WI	80	New Construction
Mercantile Lofts	Milwaukee WI	36	Adaptive Reuse
Shoe Factory Lofts	Milwaukee WI	55	Adaptive Reuse
The Rivers - Phase II-Senior Living	Oshkosh WI	40	New Construction
Woolen Mills Lofts	Appleton WI	60	Adaptive Reuse
Century Building	Milwaukee WI	44	Adaptive Reuse
Cranberry Woods Townhomes	Wisconsin Rapids WI	40	New Construction
Bayside Senior Apartments	Oconto WI	42	New Construction
Whispering Echoes Townhomes	Winneconne WI	28	New Construction
Regency Place Senior Living	Little Chute WI	40	New Construction
Under Construction			
Arbor Terrace Senior Living	Wisconsin Rapids WI	40	New Construction
City Center	Brillion WI	40	New Construction
Crescent Lofts	Appleton WI	69	Adaptive Reuse
The Limerick	Fitchburg, WI	127	New Construction
The Waterford	McFarland, Wi	49	New Construction
Uno's-Madison	Madison, Wi	64	New Construction
Quentin Apartments	Palatine, IL	58	New Construction

Klassik Apartments	Verona, WI	63	New Construction
Sawyer School Lofts	Sturgeon Bay, WI	15	Apative Reuse
Oak Meadow	Depere, WI	56	Rehab
Broadway Lofts	Monona, WI	75	New Construction
Hogan Street Cottages	Antigo, WI	50	New Construciton
Brush Village II	Brush, CO	45	New Construction
2023 awards			
CC Lane	Oregon, WI	70	New Construction
Lindoo School Apartments	Ladysmith, WI	40	Adaptive Reuse
Main Street Apartments	Viroqua, WI	65	New Construction
Taylor Place Apartments	McHenry, IL	50	New Construction
Sky Ridge	Sun Prairie, WI	75	New Construction
Fox Hill Senior Living	Yorkville, IL	45	New Construction
Total Units		1,882	

DreamLane Real Estate, LLC Verona, Wisconsin, Established in 2016
--Certified Minority Owned Business Enterprise by the State of Wisconsin Department of Administration for Real Estate Sales, Investment, Development, and Consultation.
-Professional Real Estate Brokerage office helping individuals and organizations buy, sell, and invest in all types of properties including: single family, multifamily, vacant land, recreational land, commercial real estate and historic properties.
-Assisting clients to realize the value of real estate ownership/investment and strengthen the communities in which our clients live and work.
-Purchased, sold, invested, own or developed more than 25 million dollars of multi-family, light commercial, and single-family assets throughout Dane County, Milwaukee County, and their surrounding areas.
-12 years of real estate and property management experience
-Perform on-site reviews of single family and multifamily properties to assess the conditions and risks to the purchaser.
-Negotiated loan and finance documents.
-Review and analyze financial audits and proformas.
-Assist in multifamily site selection, offer negotiations, land entitlements approvals.
-DreamLane's success can be attributed to my passion not only for real estate, but also to my intuition regarding the psychology and desire of home ownership, real estate investment and development. My business has grown successfully and consistently thanks to the repeat business of happy clients and the introductions to friends, family, and neighbors. I expect this trend in to continue as my business shifts even more into the market-rate, affordable, and senior housing sector(s) and diversify my business with my partnership with Northpointe Development
-Co-Developer with Northpointe on LIHTC awarded applications of Uno's Madison, The Waterford in McFarland, The Klassik in Verona.
-Fitchburg Planning Commission- Commissioner 2017-2020

Cordon Housing, assuming the role of Non-profit Co-Developer and Co-Owner on the proposed project, is an established, not-for-profit organization, committed to providing stable, affordable housing for low-income and homeless veterans across the Country. In 2021, Cordon Housing was conceived through the collaboration of Jorjio Hopkins, a veteran Marine officer, and Chris Bailey, a veteran of the 173rd Airborne Brigade. The founders connected at the Wisconsin Veterans Chamber of Commerce, where they discussed the housing disparities faced by low-income veterans. Motivated by their own experiences and the challenges encountered by peers, Chris and Jorjio established a nonprofit focused on creating stable housing solutions for veterans. In 2022, they applied for 501 (c)(3) status and received official nonprofit status in May 2023. With expertise gained from working at

national real estate investment firms, state housing finance authorities, and top-tier development firms, our founders are equipped to help make a difference for veterans in need of stable and affordable housing. Cordon Housing connects veteran tenants with specialized peer organizations, affordable housing projects and service providers who work tirelessly to solve veteran's issues. We use our relationships with these organizations to ensure veterans receive support in securing benefits, accessing VA healthcare, receiving guidance on educational opportunities, career paths, and career mentorship opportunities. With a focus on long-term stability, we also connect veterans with resources to help in developing savings plans and connecting with VA loan underwriters to achieve homeownership over time. Through comprehensive support and affordable housing, we empower veterans, enhancing their quality of life and facilitating their journey towards a rewarding future. Cordon's involvement in the project will remain throughout the compliance period, actively participating in all aspects of the project's development activities to ensure homeless and disabled veterans are safely housed, including but not limited to design, financing, lease-up, stabilization. Cordon, as co-owner and co-developer will help coordinate with the property management and compliance team, on-site service provider and organizations such as the Veterans Service Organizations (VSO), United States Department of Veterans Affairs, Supportive Services for Veteran Families (SSVF) to aid in coordinated entry, obtaining referrals and VASH vouchers, connect veterans to other veteran's oriented programs (Veterans' Smile, Team Red White and Blue, Outward Bound, and others) and is there to provide resources where available and to ensure the needs of the project's residents are met.
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LL. **PROPERTY MANAGEMENT:** Describe the experience and qualifications of the organization that will be handling the ongoing property management.

ACC Management Group, Inc. is a full-service property management firm dedicated to providing professional results-oriented services to its clients. ACC currently operates over 80 properties and 8500 apartments throughout Wisconsin's major markets and Illinois. Headquartered in Oshkosh, WI, ACC's exceptional team of multi-family leaders has a proven track record of excellence in management of affordable housing with various state and federal programs including, Section 42 Tax Credit, Section 8, and Section 515. Commitment, trust, and reliability is the foundation of our relationships with residents, employees, and partners. Our team works hard to earn the loyalty needed to develop and retain the long-term relationships associated with our shared success. There are over 100,000 multifamily projects built each year with the use of Low-Income Housing Tax Credits (LIHTC). Over the years, the LIHTC program and other affordable housing programs have become increasingly competitive, and as a result, complex. Most developments with an affordable housing component have multiple layers of financing, each with associated requirements. This includes varying regulations, reporting, and oversight requirements for Section 42 LIHTC, Project Based Section 8, AHP, HOME, and Rural Development. It also includes new components such as preferences, new set asides, RAD and more. Adhering to program requirements during the first year, and each subsequent year during the regulatory period is essential to any successful affordable housing real estate development.
ACC Management Group has established a long history of extraordinary program compliance proven by superior ratings with state and federal agencies, such as WHEDA, IHDA, and HUD. ACC's experienced team of compliance professionals assist you through the initial stages of your development and the entire regulatory period for your property. With combined affordable housing management experience of nearly 100 years, ACC's leadership team is well qualified to ensure compliance with all regulatory agreements and provide valuable input throughout the development process.

ACC Management's affordable housing portfolio increases year after year, as does the quality of service their team of experts provide in the field of property management and Section 42 compliance. ACC's leadership team typically becomes involved 12-18 months prior to the expected completion date. We offer our clients a fresh perspective on building design, staffing needs, market trends, and much more. As the completion date approaches, ACC's efforts increase and all hands are on deck for the lease-up of the new development. All applicants are qualified and the development is typically fully leased within 30 – 90 days of the completion date with full compliance of all regulatory agreements. Most recently, ACC has assisted developers transition multiple properties from Public Housing to Section 8 housing through HUD's RAD program.

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

N/A

PROJECT FINANCING

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

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

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

SOURCE	AMOUNT
First Mortgage	6,108,000
FED LIHTC Equity	11,157,108
AHP	2,000,000
City of Madison AHF	3,000,000
Dane County AHDF	4,000,000
Deferred Developer Fee	2,003,698
TOTAL	28,268,807

USES	AMOUNT
Construction	18,667,530
Construction Contingency	933,377
Architectural & Engineering	351,400
Interim Construction Cost	1,695,000
Financing Fees & Expenses	140,000
Soft Cost	224,500
Sydication Costs	12,000
Developer Fee	4,000,000
Reserves	595,000
Aquisition	1,650,000
TOTAL	28,268,807

NN. Which of the identified sources have been secured?

$3 million of Affordable Housing Funds have been secured as well as construction and perm debt finacing. Dane County Housing Authority will issue the bonds for the project. WHEDA non-competitive tax credits and bonds have been applied for in July.

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

The project applied for 4% Federal Non-Competitive Credits in July 2025.

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

The Dane County funds will help reduce the finacial gap of the project and allow long term operations. The financial gap can be atributed to a number of priorities of the County. The project will have permenant affordabilty, a significant number of units set-aside at 30, 50, and 80% of the County median. The project will also be designed around sustanabilty and include a 120kw solar system and LEED Zero Energy certification. Over 20% of the units will be three-bedrooms desingnated for familes.

The project is well located in highly traveled location with access to public transportation, retail, jobs, and schools. The site is currenlty being used (underutilized) as Church, which will remain as an anchor offering services and programing to the tenants. With the Church (Northside Christian Academy) remaining as a stakeholder, we collaborated to structure a mutually beneficial agreement where we acquired the property at fair market value. Construciton costs and interest rates have increased significantly over the past 18 months creating a financial gap while using the state and federal 4% program. The project is also committing to $40,000 from operations and taking vouchers for the 80% units, significantly reducing the amount of debt the project could otherwise carry.

VIP- the site was originally (2024 and before) within a designated Qualified Census Tract (QCT) which allowed for a 30% basis boost in tax credits. Starting in 2025 the site is no longer in a QCT however, we have confirmed with WHEDA that we have preserved the QCT status of the site due to actions we took to apply originally in 2024. The QCT preservation expires after two years if this proejct doesn't move forward, which highlights the need for the county funds to bridge the financial gap of the project in this round.

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

OPERATING BUDGET

	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**Year 6**	**Year 7**	**Year 8**	**Year 9**	**Year 10**
INCOME										
Gross Potential Rent	See attached doc									
Vacancy										
Other Income										
Total Income										
OPERATING EXPENSES										
Marketing										

Payroll										
Other Administrative Costs										
Management Fees										
Utilities										
Security										
Maintenance Expenses										
Property Taxes										
Supportive Services										
Insurance										
Reserves for Replacement										
Total Operating Expenses										
Net Operating Income										
Debt Service										
Asset Management										
Cash Flow										

	Year 11	**Year 12**	**Year 13**	**Year 14**	**Year 15**	**Year 16**	**Year 17**	**Year 18**	**Year 19**	**Year 20**
INCOME										
Gross Potential Rent										
Vacancy										
Other Income										
Total Income										
OPERATING EXPENSES										
Marketing										
Payroll										
Other Administrative Costs										
Management Fees										
Utilities										
Security										
Maintenance Expenses										
Property Taxes										
Supportive Services										
Insurance										
Reserves for Replacement										
Total Operating Expenses										

Net Operating Income										
Debt Service										
Asset Management										
Cash Flow										

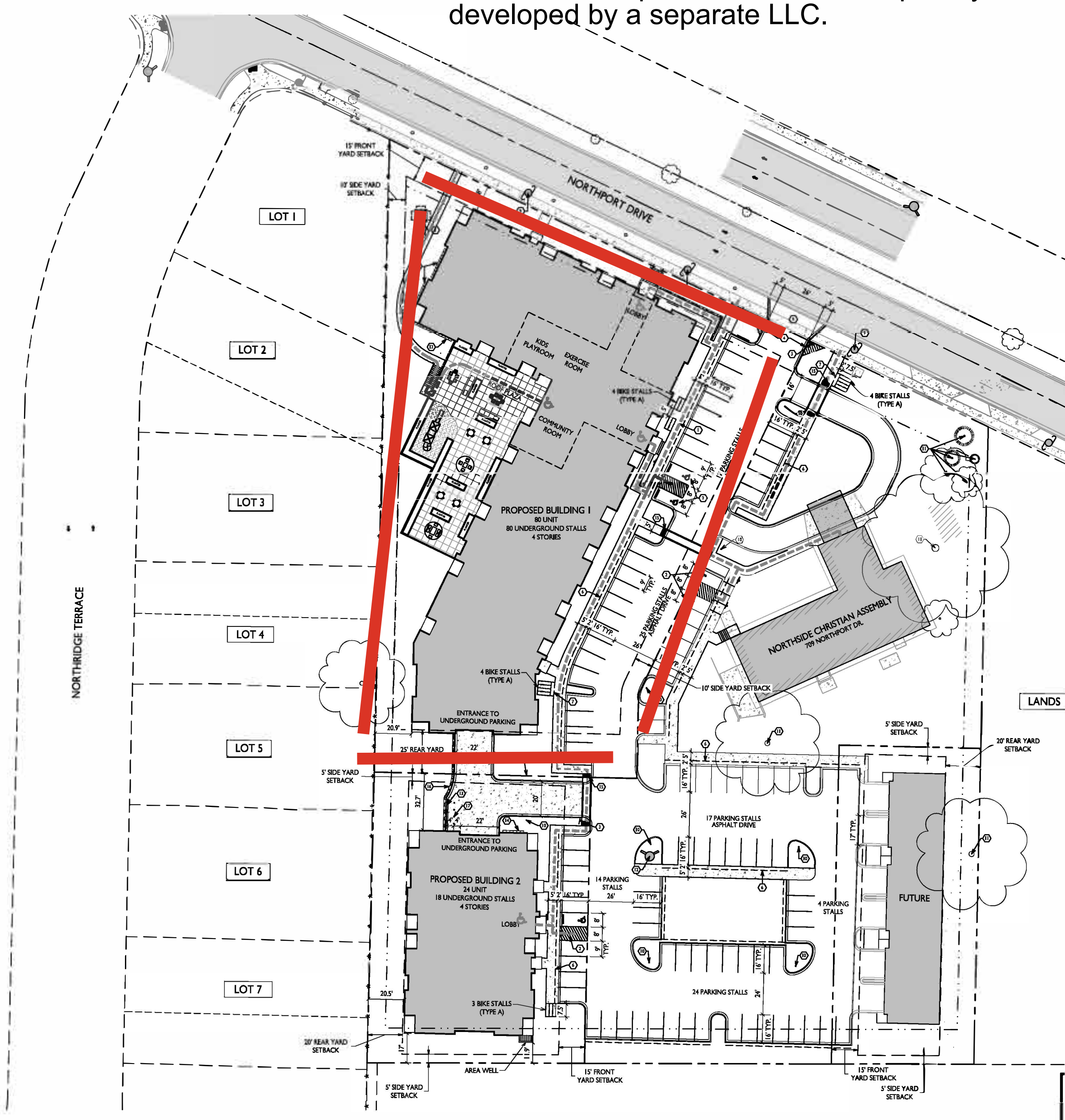
United Residences
80 Units
PROJECTED CASH FLOW

Annual Income Increase	2.00%
Annual Expense Increase	3.00%

	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
	Yr 1	YR 2	YR 3	YR 4	YR 5	YR 6	YR 7	YR 8	YR 9	YR 10
INCOME										
Gross Rental Income	1,244,340	1,269,227	1,294,611	1,320,504	1,346,914	1,373,852	1,401,329	1,429,356	1,457,943	1,487,101
Vacancy Loss	(87,104)	(88,846)	(90,623)	(92,435)	(94,284)	(96,170)	(98,093)	(100,055)	(102,056)	(104,097)
Net Rental Income	1,157,236	1,180,381	1,203,989	1,228,068	1,252,630	1,277,682	1,303,236	1,329,301	1,355,887	1,383,004
Other Income	10,000	10,200	10,404	10,612	10,824	11,041	11,262	11,487	11,717	11,951
Interest Income										
Effective Gross Income	1,167,236	1,190,581	1,214,393	1,238,680	1,263,454	1,288,723	1,314,498	1,340,787	1,367,603	1,394,955
EXPENSES										
Administrative	213,362	219,763	226,356	233,146	240,141	247,345	254,765	262,408	270,280	278,389
Utilities	80,000	82,400	84,872	87,418	90,041	92,742	95,524	98,390	101,342	104,382
Maintenance	95,720	98,592	101,549	104,596	107,734	110,966	114,295	117,724	121,255	124,893
Taxes & Insurance	207,000	213,210	219,606	226,194	232,980	239,970	247,169	254,584	262,221	270,088
State Compliance	3,600	3,708	3,819	3,934	4,052	4,173	4,299	4,428	4,560	4,697
Replacement Reserve	24,000	24,720	25,462	26,225	27,012	27,823	28,657	29,517	30,402	31,315
Total Operating Expenses	623,682	642,392	661,664	681,514	701,959	723,018	744,709	767,050	790,061	813,763
NET OPERATING INCOME	543,554	548,189	552,729	557,166	561,495	565,705	569,789	573,738	577,542	581,192
First Mortgage	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932
Second Mortgage										
Third Mortgage					-	-	-	-	-	-
Total Debt Service	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932
Operating Cash Flows	90,622	95,256	99,796	104,234	108,562	112,773	116,856	120,805	124,609	128,260
Transfer from/(to) reserves	-	-	-	-	-	-	-	-	-	-
Cash Flow Before Fees	90,622	95,256	99,796	104,234	108,562	112,773	116,856	120,805	124,609	128,260

	2037	2038	2039	2040	2041	2042	2043	2044	2045	2047
	YR 11	YR 12	YR 13	YR 14	YR 15	YR 16	YR 17	YR 18	YR 19	YR 20
INCOME										
Gross Rental Income	1,516,844	1,547,180	1,578,124	1,609,686	1,641,880	1,674,718	1,708,212	1,742,376	1,777,224	1,849,024
Vacancy Loss	(106,179)	(108,303)	(110,469)	(112,678)	(114,932)	(117,230)	(119,575)	(121,966)	(124,406)	(129,432)
Net Rental Income	1,410,664	1,438,878	1,467,655	1,497,008	1,526,949	1,557,488	1,588,637	1,620,410	1,652,818	1,719,592
Other Income	12,190	12,434	12,682	12,936	13,195	13,459	13,728	14,002	14,282	14,859
Interest Income										
Effective Gross Income	1,422,854	1,451,312	1,480,338	1,509,944	1,540,143	1,570,946	1,602,365	1,634,412	1,667,101	1,734,452
EXPENSES										
Administrative	286,740	295,343	304,203	313,329	322,729	332,411	342,383	352,655	363,234	385,355
Utilities	107,513	110,739	114,061	117,483	121,007	124,637	128,377	132,228	136,195	144,489
Maintenance	128,640	132,499	136,474	140,568	144,785	149,129	153,603	158,211	162,957	172,881
Taxes & Insurance	278,191	286,536	295,133	303,986	313,106	322,499	332,174	342,139	352,404	373,865
State Compliance	4,838	4,983	5,133	5,287	5,445	5,609	5,777	5,950	6,129	6,502
Replacement Reserve	32,254	33,222	34,218	35,245	36,302	37,391	38,513	39,668	40,858	43,347
Total Operating Expenses	838,176	863,321	889,221	915,898	943,375	971,676	1,000,826	1,030,851	1,061,777	1,126,439
NET OPERATING INCOME	584,678	587,990	591,117	594,047	596,769	599,270	601,539	603,561	605,324	608,013
First Mortgage	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932
Second Mortgage										
Third Mortgage	-	-	-	-	-	-	-	-	-	-
Total Debt Service	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932	452,932
Operating Cash Flows	131,746	135,058	138,184	141,114	143,836	146,338	148,607	150,629	152,392	155,080
Transfer from/(to) reserves	-	-	-	-	-	-	-	-	-	-
Cash Flow Before Fees	131,746	135,058	138,184	141,114	143,836	146,338	148,607	150,629	152,392	155,080

80 Unit Multifamily building- the other uses will be developed by others including new Homeownership townhomes developed by habitat a seniorhousing buiding housing building developed by a separate LLC.



1 CA101 ARCHITECTURAL SITE PLAN
1" = 30'-0"

GRAPHIC SCALE
0 30 60 90
1 INCH = 30 FT (24X36 SHEET)

GENERAL NOTES:

1. THEAPPLICANTSHALL REPLACEALL SIDEWALK AND CUR B AND GUTTER THAT ABUTS THE PROPERTY THAT IS DAMAGED BY THE CONSTRUCTION, OR ANY SIDEWALK AND CUR B AND GUTTER WHICH THE CITY ENGINEER DETERMINES NEEDS TO BE REPLACED BECAUSE IT IS NOT AT A DESIRABLE GRADE, REGARDLESS OF WHETHER THE CONDITION EXISTED PRIOR TO BEGINNING CONSTRUCTION.

2. ALLWORK IN THE PUBLICRIGHT OFWAY SHALL BEPERFORMED BY ACITY-LICENSED CONTRACTOR.

3. ALLDAMAGETOTHE PAVEMENT ON CITY STREETS, AND ADJACENT TO THIS DEVELOPMENT SHALL BE RESTORED IN ACCORDANCE WITH THE CITY OF MADISON'S PAVEMENT PATCHING CRITERIA.

4. ALL PROPOSEDSTREET TREEREMOVALS WITHINTHE RIGHTOF WAY SHALL BE REVIEWED BY CITY FORESTRY BEFORE THE PLAN COMMISSION MEETING. STREET TREE REMOVALSREQUIRE APPROVAL ANDA TREE REMOVAL PERMIT ISSUED BY CITY FORESTRY. ANY STREETTREE REMOVALS REQUESTED AFTER THE DEVELOPMENT PLAN IS APPROVED BY THE PLAN COMMISSION OR THE BOARD OF PUBLIC WORKS AND CITY FORESTRY WILL REQUIRE A MINIMUM OF A 72-HOUR REVIEW PERIOD WHICH SHALL INCLUDETHE NOTIFICATION OF THE ALDERPERSON WITHIN WHO'SDISTRICTIS AFFECTED BY THE STREET TREE REMOVAL(S) PRIOR TO A TREE REMOVALPERMIT BEING ISSUED.

5. AS DEFINED BY THESECTION 107.13OF CITY OF MADISON STANDARD SPECIFICATIONS FOR PU BLIC WORKS CONSTRUCTION: NO EXCAVATION IS PERMITTED WITHIN 5 FEET OFTHETRUNK OF THE STREET TREE OR WHEN CUTTING ROOTS OVER 3 INCHES IN DIAMETER. IF EXCAVATION IS NECESSARY, THECONTRACTOR SHALLCONTACTMADISON CITY FORESTRY (266-4816) PRIORTO EXCAVATION. CITY OF MADISON FORESTRY PERSONNEL SHALL ASSESS THE IMPACT TO THE TREE AND TO ITS ROOT SYSTEM PRIORTOWORKCOMMENCING. TREE PROTECTION SPECIFICATIONS CAN BE FOUND ON THE FOLLOWING WEBSITE: CITYOFMADISON.COM/BUSINESS/PW/SPECS.CFM

6. CONTRACTORSHALL TAKE PRECAUTIONS DURING CONSTRUCTION TO NOT DISFIGURE, SCAR, OR IMPAIR THE HEALTH OF ANY STREET TREE. CONTRACTOR SHALL OPERATE EQUIPMENT IN A MANNER AS TO NOT DAMAGE THE BRANCHES OF THE STREET TREE(S) . THISMAY REQUIREUSING SMALLER EQUIPMENT AND LOADING AND UNLOADING MATERIALS IN A DESIGNATED SPACE AWAY FROM TREES ON THE CONSTRUCTION SITE. ANY DAMAGE OR INJURY TO EXISTING STREET TREES (EITHER ABOVE OR BELOW GROUND) SHALL BE REPORTEDIMMEDIATELY TO CITY FORESTRY AT 266-4816. PENALTIESAND REMEDIATIONSHALL BE REQUIRED.

7. SECTION 107.13(G) OFCITYOF MADISON STANDARD SPECIFICATIONS FOR PUBLIC WORKS CONSTRUCTION ADDRESSES SOIL COMPACTION NEAR STREET TREES AND SHALL BE FOLLOWED BY CONTRACTOR. THESTORAGE OF PARKEDVEHICLES, CONSTRUCTION EQUIPMENT, BUILDING MATERIALS, REFUSE, EXCAVATED SPOILS OR DUMPING OF POISONOUS MATERIALS ON OR AROUND TREES AND ROOTS WITHIN FIVE (5) FEET OFTHE TREE OR WITHIN THE PROTECTION ZONE IS PROHIBITED.

8. ON THIS PROJECT, STREET TREE PROTECTION ZONE FENCING IS REQUIRED. THE FENCING SHALL BE ERECTED BEFORETHE DEMOLITION, GRADING OR CONSTRUCTION BEGINS. THE FENCE SHALL INCLUDE THE ENTIRE WIDTH OF TERRACE AND, EXTEND AT LEAST 5 FEET ON BOTH SIDES OFTHE OUTSIDE EDGE OF THE TREE TRUNK. DO NOT REMOVE THE FENCING TOALLOW FOR DELIVERIES OR EQUIPMENT ACCESS THROUGH THE TREE PROTECTION ZONE.

9. STREET TREEPRUNING SHALL BE COORDINATED WITH MADISON FORESTRY AT A MINIMUM OF TWO WEEKS PRIOR TO THE START OF CONSTRUCTION FOR THIS PROJECT. ALL PRUNING SHALL FOLLOW THEAMERICAN NATIONAL STANDARDS INSTITUTE (ANSI) A300 - PART 1 STANDARDS FOR PRUNING.

10. ATLEASTONEWEEK PRIORTO STREET TREE PLANTING, CONTRACTORSHALL CONTACT CITY FORESTRY AT(608) 266-4816TO SCHEDULE INSPECTION AND APPROVAL OF NURSERY TREE STOCK AND REVIEW PLANTING SPECIFICATIONS WITH THE LANDSCAPER.

11. APPROVAL OF PLANSFORTHIS PROJECTDOES NOT INCLUDE ANY APPROVAL TO PRUNE, REMOVE, OR PLANT TREES IN THE PUBLIC RIGHT-OF-WAY. PERMISSION FOR SUCH ACTIVITIES MUST BE OBTAINED FROM THE CITY FORESTER (266-4816).

12. THE PUBLICRIGHT-OF-WAY IS THESOLE JURISDICTION OF THE CITY OF MADISON AND IS SUBJECTTO CHANGE AT ANY TIME. NO ITEMS SHOWN ON THIS SITE PLAN IN THE RIGHT-OF-WAY ARE PERMANENT AND MAY NEED TO BE REMOVED AT THE APPLICANTS EXPENSE UPON NOTIFICATION BY THECITY.

KEYED PLAN NOTES	
1	ACCESSIBLE ROUTE - 5% RUNNING SLOPE / 2% CROSS SLOPE MAXIMUM.
2	STALL - MAXIMUM 2% SLOPE IN ALL DIRECTIONS. MOUNT ACCESSIBLE PARKING SIGN @ 60" HIGH TO BOTTOM OF SIGN.
3	STOP SIGN - @ 7' HIGH TO OF SIGN
4	10' VISION TRIANGLE - NO VISUAL OBSTRUCTIONS BETWEEN 30" AND 10' IN HEIGHT WITHIN HATCHED AREA.
5	CLASS III DRIVEWAY APPROACH IN ACCORDANCE WITH THE STANDARD SPECIFICATIONS
6	2' VEHICLE OVERHANG
7	2' BICYCLE OVERHANG
8	TRANSFORMER ON CONCRETE PAD
9	EXISTING OVERHEAD LINE
10	LIGHT POLE - SEE SHEET CA102 FOR FIXTURE SCHEDULE
11	EXISTING TREE TO REMAIN
12	PROPOSED FIRE HYDRANT
13	GAS METERS - SEE AC200 SERIES FOR ELEVATION VIEWS
14	ELECTRIC METERS - SEE AC200 SERIES FOR ELEVATION VIEWS
15	DETECTABLE WARNING INSERT
16	RETAINING WALL
17	CONCRETE FILLED PIPE BOLLARD (TYP.)

SITE DEVELOPMENT DATA:

ZONING	TR-U1 Traditional Residential -Urban 1
DENSITIES:	
LOT AREA	81,847S.F. / 1.88ACRES
DWELLINGUNITS	104 UNITS
LOT AREA / D.U.	787 S.F. / D.U.
DENSITY	55 UNITS / ACRE
LOT COVERAGE	85,350 S.F.(60%)
BUILDING 1 HEIGHT	4 STORIES / 52-0"
BUILDING 2 HEIGHT	4 STORIES / 53'-0"

DWELLING UNIT MIX:

BUILDING 1:		BUILDING 2:	
STUDIO	7	STUDIO	0
ONE BEDROOM	32	ONE BEDROOM	13
TWO BEDROOM	22	TWO BEDROOM	11
THREE BEDROOM	19	TOTAL	24
TOTAL	80		

VEHICLEPARKINGSTALLS:

BUILDING 1:		BUILDING 2:	
UNDERGROUND GARAGE	80	UNDERGROUND GARAGE	18
SURFACE	25	SURFACE	14
TOTAL	105	TOTAL	32

*ALL ADDITIONAL STALLS (62) ALLOCATED FOR CHURCH PARKING

BICYCLE PARKING:

BUILDING 1:		BUILDING 2:	
GARAGE	92	GARAGE	24
SURFACE -GUESTS	8	SURFACE -GUESTS	3
TOTAL	100	TOTAL	27

*ADDITIONAL (4) STALLS ALLOCATED FORCHURCH GUESTS

BIKE RACKS

TYPE A
EXTERIOR FLOOR
MOUNTED:
"INVERTED U" TYPE. MADRAX UX OR SARIS BIKE DOCK

TYPE B
INTERIOR FLOOR
MOUNTED:
MADRAX SPARTAN RACK OR SARIS CITY BIKE RACK

TYPE C
INTERIOR WALL
MOUNTED:
MADRAX VERTICAL RACK OR SARIS BIKE TRACK

kba
knothe bruce
ARCHITECTS

Phone: 608.836.3690
8401 Greenway Blvd., Suite 900
Middleton, WI 53562

ISSUED
Issued for Review - December 16, 2024
Land Use Submittal - May 12, 2025

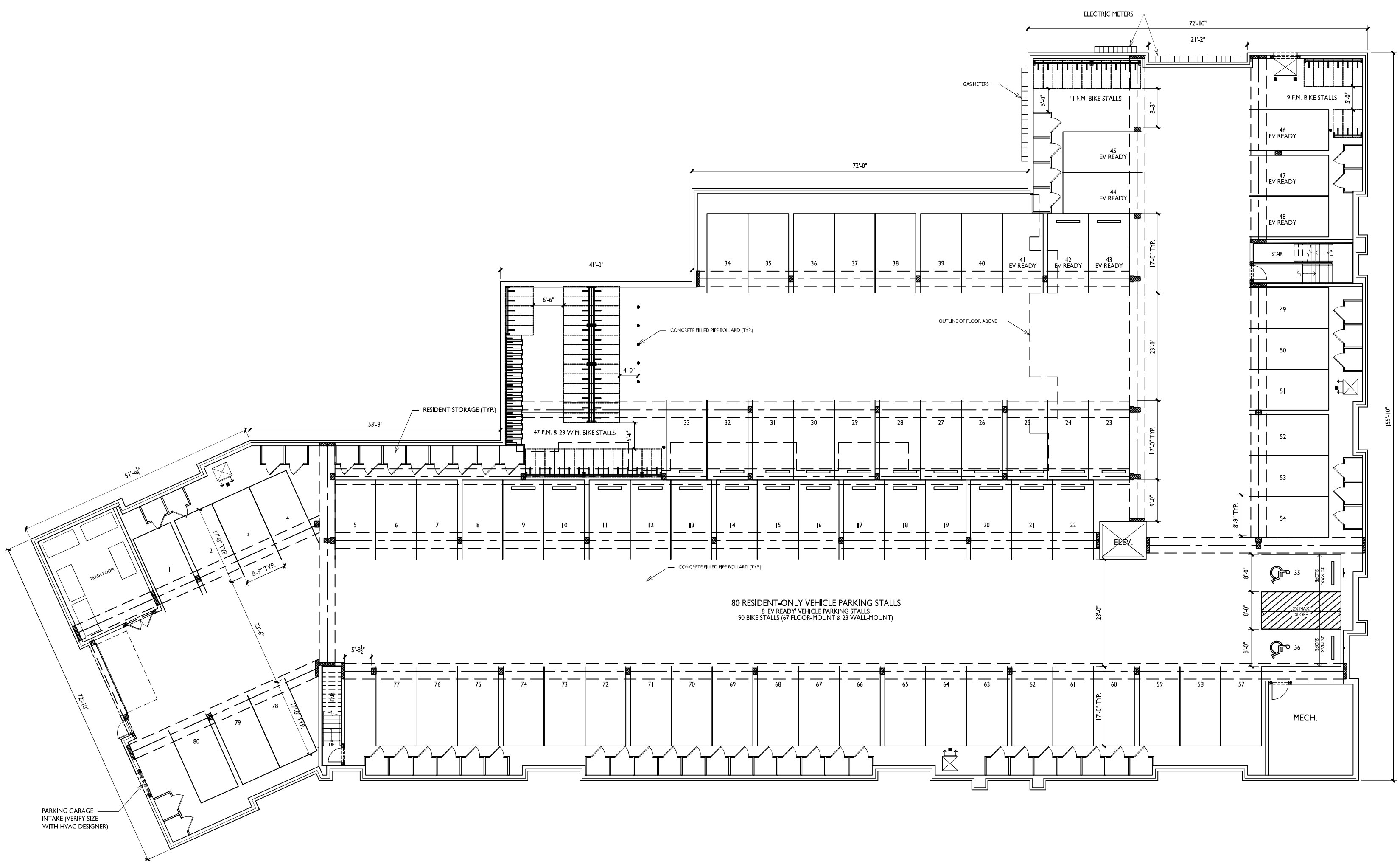
PROJECT TITLE
709 Northport Drive Redevelopment

709 Northport Drive, Madison, WI

SHEET TITLE
Architectural Site Plan

SHEET NUMBER
CA101

PROJECT NO. 2421



BUILDING 1
BASEMENT FLOOR PLAN

1 AC100.1 3/32" = 1'-0"

knothe • bruce ARCHITECTS
Phone: 608.836.3690
8401 Greenway Blvd., Suite 900 Middleton, WI 53562

ISSUED
Land Use Submittal - May 12, 2025

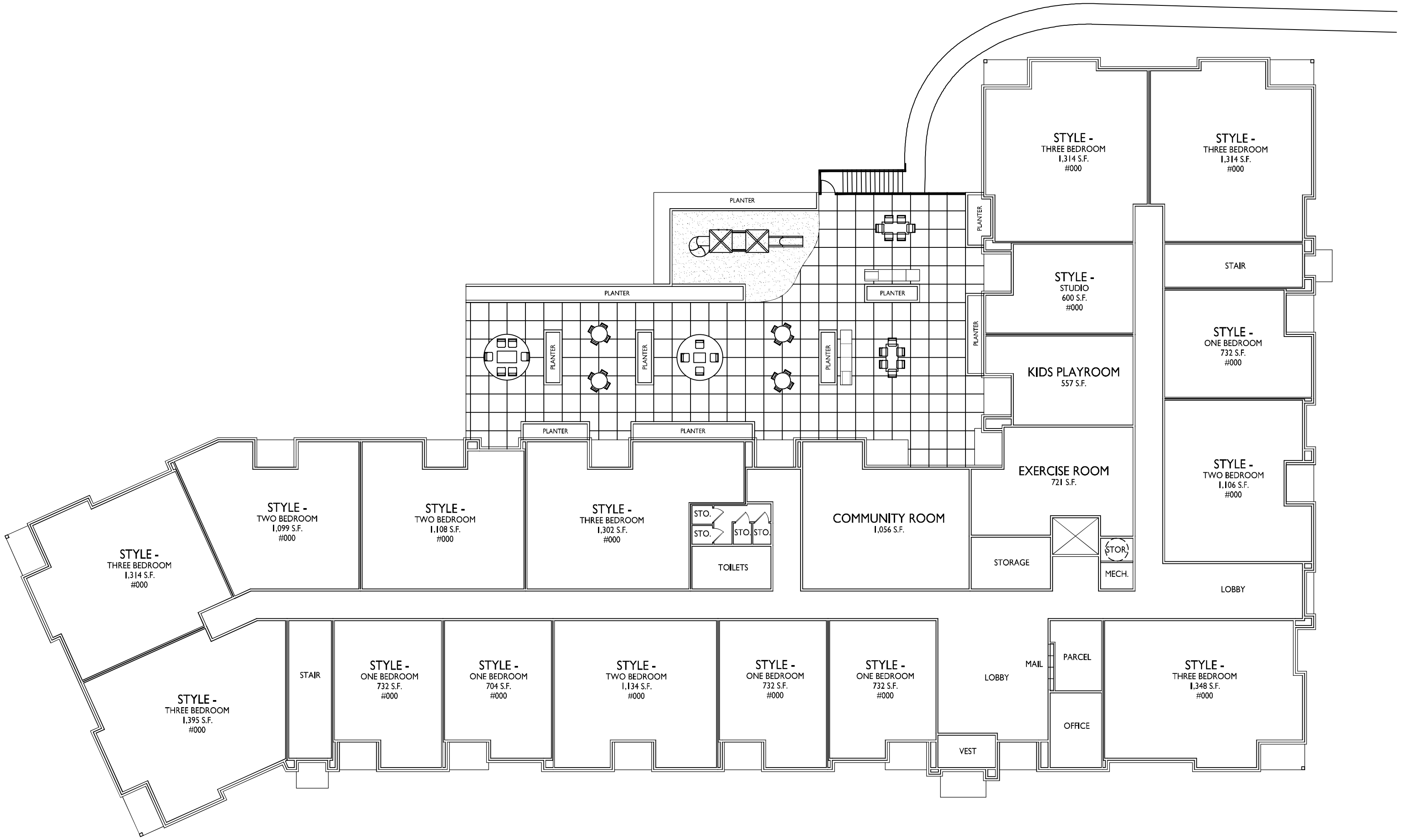
PROJECT TITLE
709 Northport Drive Redevelopment

709 Northport Drive, Madison, WI

SHEET TITLE
Building #1 Basement Plan

SHEET NUMBER
AC100.1

PROJECT NO. 2421



BUILDING 1
FIRST FLOOR PLAN
1
AC101.1
3/32" = 1'-0"

knothe • bruce
ARCHITECTS
Phone: 608.836.3690
8401 Greenway Blvd., Suite 900
Middleton, WI 53562

ISSUED
Land Use Submittal - May 12, 2025

PROJECT TITLE
709 Northport Drive Redevelopment

709 Northport Drive, Madison, WI

SHEET TITLE
Building #1
First Floor Plan

SHEET NUMBER
AC101.1

PROJECT NO. 2421

1 AC102.1 BUILDING 1
SECOND FLOOR PLAN
3/32" = 1'-0"

knothe • bruce ARCHITECTS
Phone: 608.836.3690
8401 Greenway Blvd., Suite 900 Middleton, WI 53562

ISSUED
Land Use Submittal - May 12, 2025

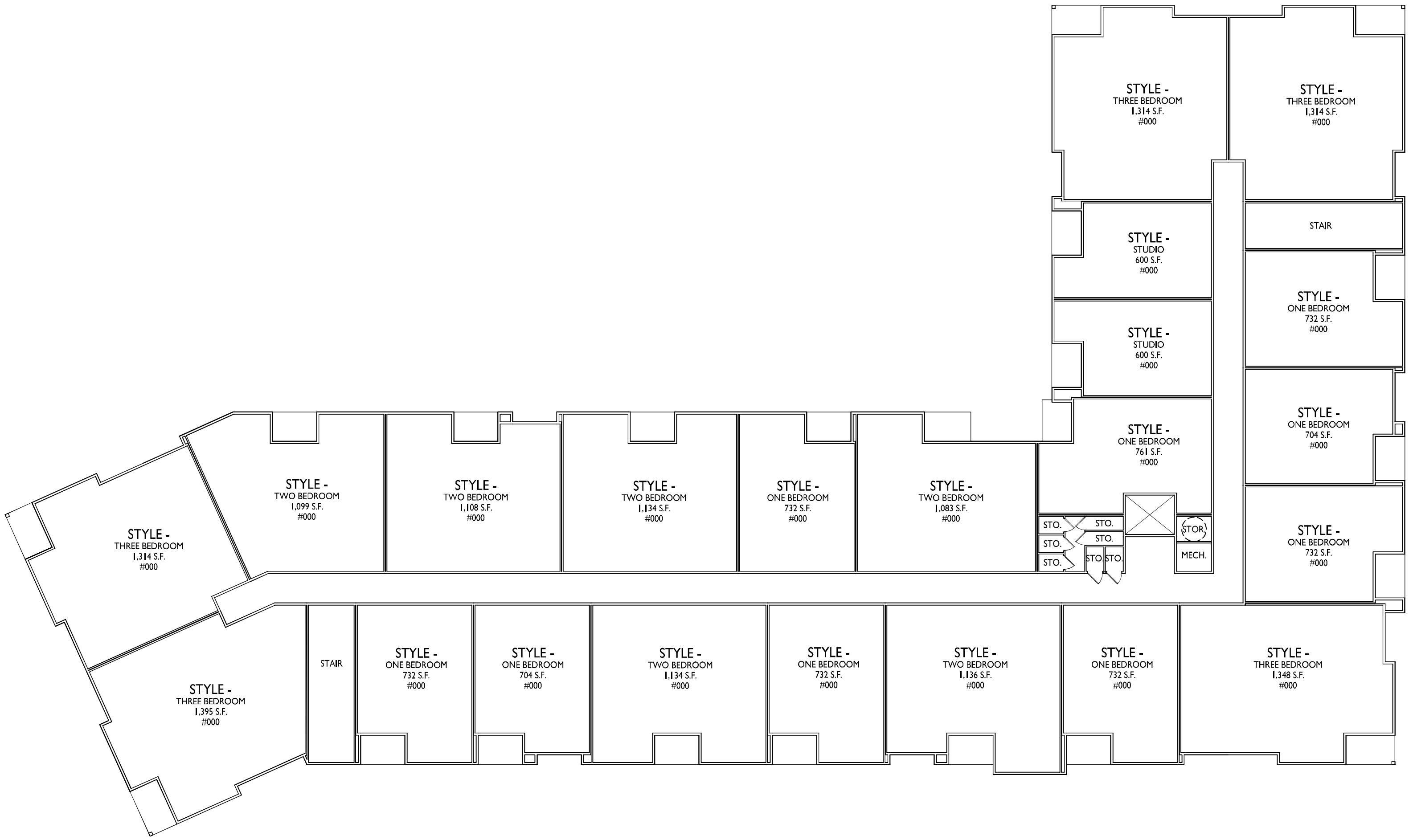
PROJECT TITLE
709 Northport Drive Redevelopment

709 Northport Drive, Madison, WI

SHEET TITLE
Building #1 Second Floor Plan

SHEET NUMBER
AC102.1

PROJECT NO. 2421



1 AC103.1 BUILDING 1 THIRD FLOOR PLAN
3/32" = 1'-0"

knothe • bruce ARCHITECTS
Phone: 608.836.3690
8401 Greenway Blvd., Suite 900 Middleton, WI 53562

ISSUED
Land Use Submittal - May 12, 2025

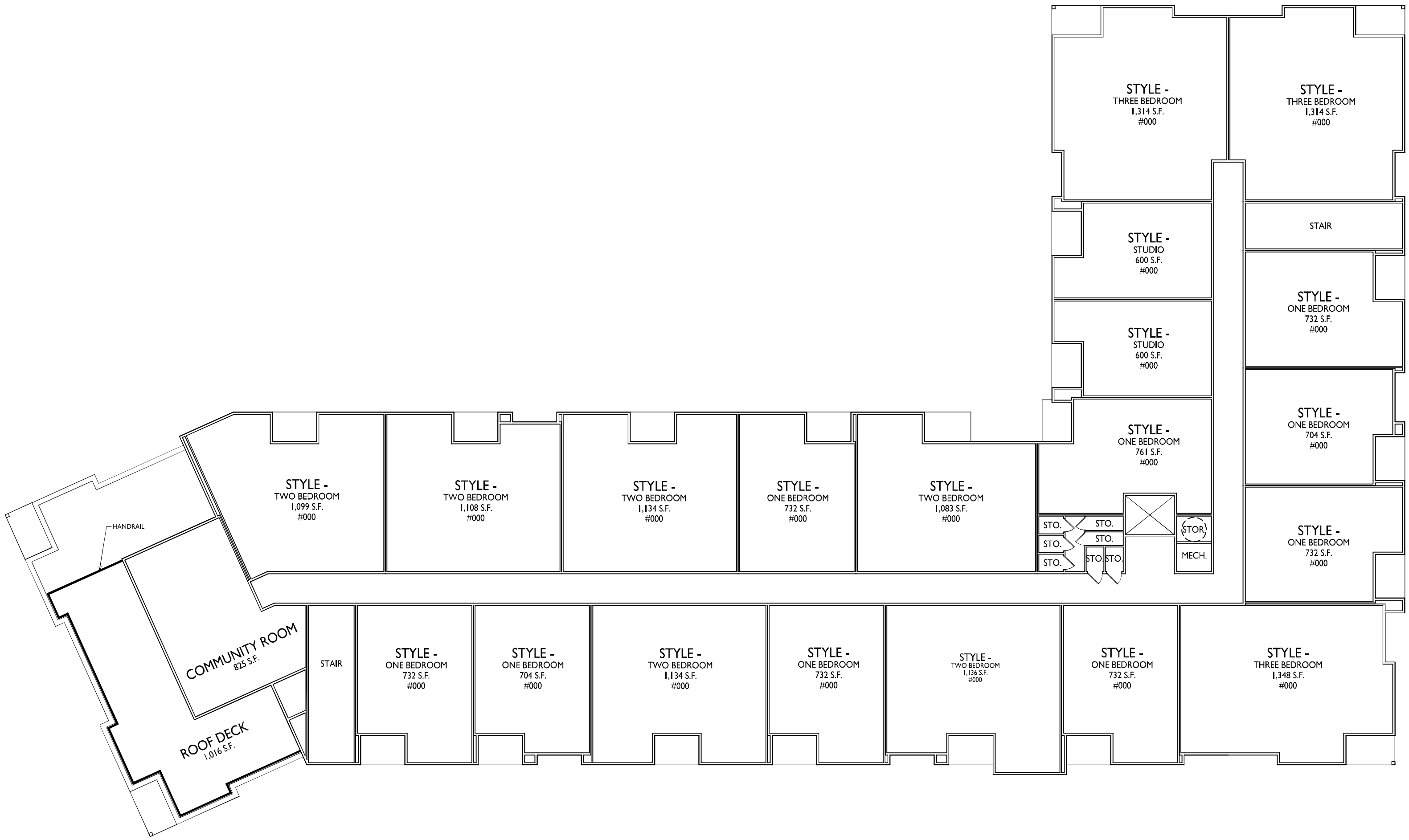
PROJECT TITLE
709 Northport Drive Redevelopment

709 Northport Drive, Madison, WI

SHEET TITLE
Building #1 Third Floor Plan

SHEET NUMBER
AC103.1

PROJECT NO. 2421



1
AC104.1

BUILDING 1
FOURTH FLOOR PLAN

3/32" = 1'-0"

knothe • bruce
ARCHITECTS
Phone: 608.836.3690
8401 Greenway Blvd., Suite 900
Middleton, WI 53562

ISSUED
Land Use Submittal - May 12, 2025

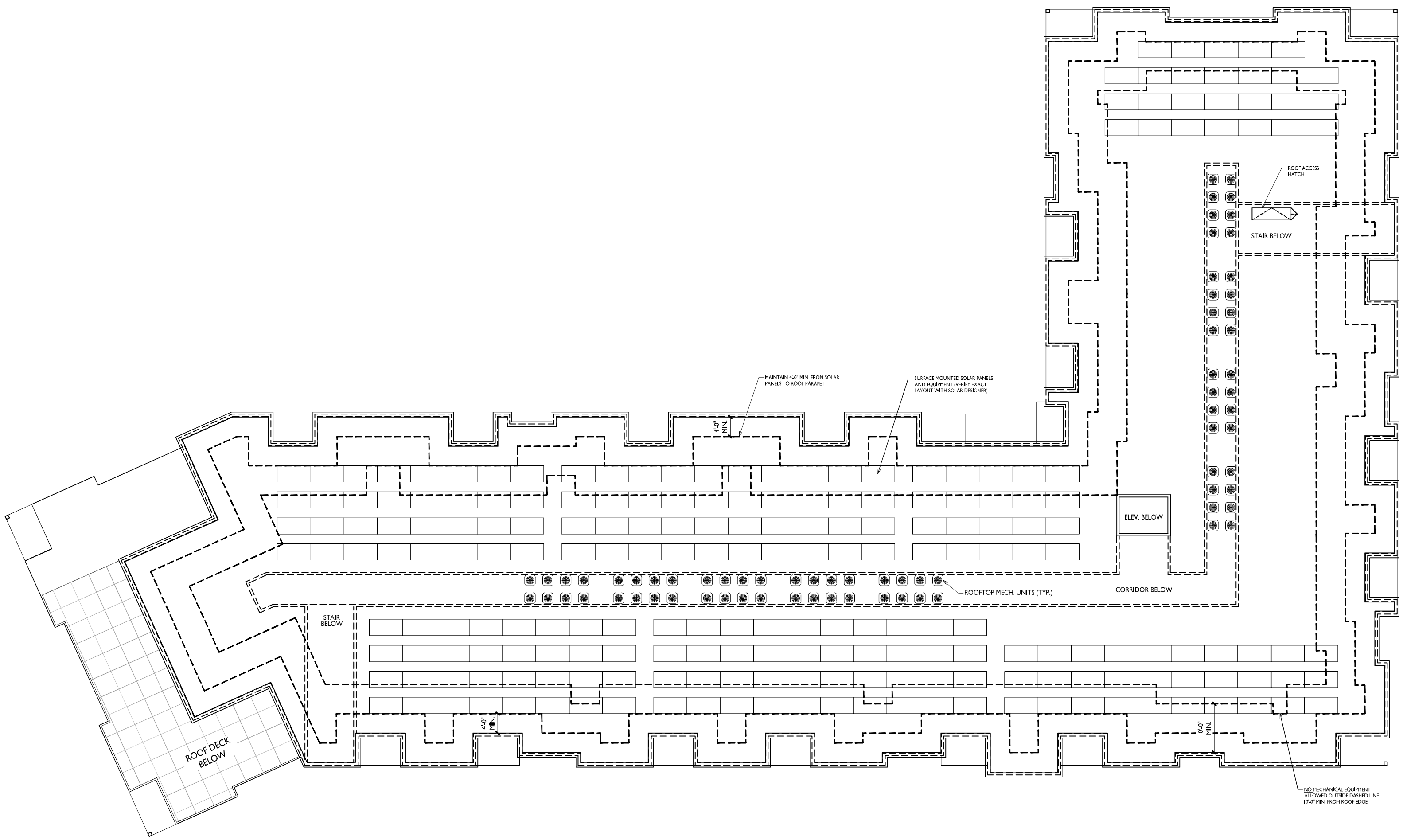
PROJECT TITLE
709 Northport Drive Redevelopment

709 Northport Drive,
Madison, WI

SHEET TITLE
Building #1
Fourth Floor Plan

SHEET NUMBER
AC104.1

PROJECT NO. 2421



1 AC105.1 BUILDING 1 ROOF PLAN
3/32" = 1'-0"

knothe • bruce ARCHITECTS
Phone: 608.836.3690
8401 Greenway Blvd., Suite 900 Middleton, WI 53562

ISSUED
Land Use Submittal - May 12, 2025

PROJECT TITLE
709 Northport Drive Redevelopment

709 Northport Drive, Madison, WI

SHEET TITLE
Building #1 Roof Plan

SHEET NUMBER
AC105.1

PROJECT NO. 2421

design + consulting

Wisconsin Housing and Economic Development Authority

July 15, 2025

Subject: United Residences – LEED Zero Energy Certification

To whom it may concern,

Northpointe Development II Corp is the developer of United Residences, an 80-unit Affordable project located at approximately 709 Northport Drive Lot 1, Madison WI. Northpointe has retained Sol design + consulting as the Sustainability consultant to deliver green commitment on the project per the Wisconsin 2025-26 Qualified Allocation Plan - Appendix W: Energy Efficiency and Sustainability.

The project team is committed to achieve LEED Silver certification towards meeting threshold certification; and achieve LEED Zero Energy certification towards meeting the Stretch Goal – Net Zero certification.

LEED Silver certification will be achieved by improving the building overall in all environmental impact areas. The LEED Residential program provides the framework to enhance green features in the building in the following categories: Location and Site Selection; Sustainable Site Landscape and Storm Water Management; Water Efficiency; Energy Efficiency; Sustainable Materials and Resources; and Indoor Air Quality. All of the abovementioned areas will be optimized to meet minimum requirements and exceed the requirements to achieve at least 50 credits necessary for LEED Silver certification. Based on our experience of Northpointe Developments, the building systems employed in their projects generally meet and exceed LEED and Energy Star building standards. The total soft cost for LEED certification will be in the range of $35,000. This includes LEED registration & certification fees, and related consulting, energy modeling, on-site verification and performance testing services.

The LEED Zero Energy certification will follow after LEED Residential certification which is a minimum prerequisite for achieving the LEED Zero Energy certification. The LEED Zero Energy program requires achieving Net Zero goal by first optimizing the energy performance of the building through the LEED certification; if feasible adding renewable energy to further offset energy use; and finally, the residual energy use of the building can be offset by purchasing renewable energy credits or carbon offsets. Once the project is placed in service, we will tract the energy usage for 1 year. The purchase of credits occurs based on the actual energy use after one year of occupancy. The total soft cost for LEED Zero Energy certification will be in the range of $25,000. This includes LEED Zero Energy registration fees, related energy analysis, management and purchase of Renewable Energy Credits.

Please feel free to contact me should you have any further questions regarding LEED certification.

Sincerely,

Sanyog B. Rathod, AIA, CPHC, LEED AP + Homes
President, Sol design + consulting
501 E. 13th Street, Cincinnati, OH-45202
Mobile: 513-939-8400, Fax: 513-455-8227
Email: sanyogr@solconsults.com
www.soldesignconsulting.com

ACC
MANAGEMENT GROUP, INC.

July 24, 2025

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

RE: United Residences

Dear Mr. O'Brien,

This letter serves as evidence of ACC Management's commitment to serve as the Property Management agent for United Residences, an 80-unit affordable multifamily property located in Madison, WI. Northpointe Development has applied for Non-competitive Housing Tax Credits from WHEDA. If awarded tax credits they plan to start construction in March of 2026. ACC has significant experience in managing high-quality affordable housing projects throughout Wisconsin and has partnered with Northpointe on similar developments to-date.

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

ACC further acknowledges that they are aware and assisted Northpointe with the application's selections to Dane County's Fair Tenant Selection Criteria and have attached the Tenant Selection Plan for the property. We also are aware of Northpointe's commitment to all of Dane County's Fair Housing Selection Criteria, Tenancy Addendum, and Denial Process as part of their funding application. We have reviewed specifics of the addendum and will include these requirements as part of our lease documents and house rules. Many of the criteria are already part of our standards.

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

Sincerely,

Chris Hand
President

2375 State Road 44, Suite A ◆ Oshkosh, WI 54904 ◆ Phone 920.966.9905 ◆ Fax 920.966.1325
www.accmangementgroup.com ◆ Equal Housing Opportunity

Targeted Populations Experience and Services

Lutheran Social Services of Wisconsin and Upper Michigan Inc.

United Residences

Targeted Populations :

- Homeless
- Special needs
- Permanent Supportive Housing

This project will set aside sixteen (16) units as Homeless, at Risk of Homelessness, and to any individual(s) with permanent developmental, physical, sensory, medical or mental health disabilities who are eligible for long-term care and supportive services to obtain and maintain permanent housing (Target Population). These units will be affordable to those at or below 30% AMI.

The primary developer is Northpointe Development II Corporation who has prior experience in developing and operating housing projects that serve The Target Population. Property Management will be provided by ACC Management Group, which will coordinate with Lutheran Social Services to ensure seamless delivery of on-site supportive services to residents. Please see attached MOU signed by LSS, Northpointe, and ACC.

Service Provider Experience

1. Service Coordination services will be provided by Lutheran Social Services, one of the largest providers of service coordination in the Midwest.

   Lutheran Social Services of Wisconsin and Upper Michigan, Inc. (LSS) is one of the largest service coordination providers in Wisconsin and the Upper Midwest. With a mission driven approach since 1882, LSS has extensive experience in housing and supportive services, operating across rural, suburban, and urban areas. Currently LSS is comprised of two Business Units – Community Based and Housing and Residential Services. Residential and housing programs at LSS provide housing and necessary supportive services to tenants, with the purpose of building vibrant communities that contribute to the greater good of individuals and families. LSS holds partner and tenant relationships with trust and work together to improve the places where people live, work and play.
   Lutheran Social Services is one of the largest providers of service coordination in LIHTC awards in Wisconsin. They have extensive experience providing supportive services to older adults, individuals with disabilities, veterans, and those who have been homeless or experiencing homelessness. Under the Lutheran Social Services model, residents work with an onsite service coordinator as often as needed to develop a plan of care, brainstorm strengths and needs, and uncover barriers to housing stability, health and wellness, and economic stability. This resident-driven program is uniquely tailored to each individual. LSS has extensive experience helping residents improve their credit, successfully find employment, access community resources such as food banks, and build their financial literacy skills, all of which contribute to housing stability and self-sufficiency.

2. The targeted population includes populations with Homeless, Special Needs and PSH, per the FHLBC definition.

   Lutheran Social Services has developed a keen understanding of the importance of providing safe, affordable housing with the provision of supportive services as a means to positively impact social determinants of health and tenant success. This understanding makes LSS uniquely positioned to assist in the creation of positive physical and social environments. The agency's experience as a non-profit development partner and housing owner and manager coupled with a wide array of available agency programs creates a continuum of care that can be offered with services including programming for at-risk infants and toddlers, family preservation services, homelessness services, veteran's housing and recovery programming, substance use treatment and mental health services, skill building initiatives, services for refugees, programming for persons with disabilities and older adults, programming for persons with law enforcement involvement, and programs designed to address trauma are all part of the continuum of care that LSS is able to provide.

LSS has been working with individuals with disabilities, older adults and families for more than 40 years. LSS has developed, owned and managed HUD subsidized housing since the early 1980s and has been involved in tax credit development since 2014. In addition, LSS has a 40+ year history of Service Coordination provision in multi-family housing developments. The LSS Service Coordination Program for housing is designed to help residents live comfortably and independently through education about and linkage to supportive services and community supports.

LSS has a 30+ year history in providing services to those experiencing or are at risk of homelessness and has developed a particular expertise in working with youth, individuals, and families who are experiencing episodes of homelessness and have special needs. Programming includes intake, assessment, intensive case management, assistance in identifying and securing housing, employment and educational assistance, skills development, physical and mental health and substance use treatment referrals, and follow-up and aftercare; these services are designed to assist program participants in maintaining housing. LSS has experience in providing these services in rural, suburban, and urban environments

3. Since the 1980s, LSS has provided HUD Service Coordination services in independent, low income housing facilities. In addition, LSS has supported Low Income Housing Tax Credit Affordable Housing communities through a supportive service model for close to ten years. Populations supported in both models included services to older adults, adults with disabilities, individuals and families at risk or whom have recently experienced homelessness, and veterans in Wisconsin and Upper Michigan. Services to residents through the Service Coordination programs are offered on a voluntary, as needed basis and take a proactive and collaborative approach in assessing resident's needs. The Service Coordinators work to help identify, access and coordinate services for residents that can help them reach their goals and remain a successful tenant.

4. Description of staff roles / responsibilities; including staff training, education, or credentials.

Lutheran Social Service (LSS) Service Coordinator role is responsible for assessing resident's needs, and provide supportive services, information, and referral services to residents. General responsibilities include:

- Providing general informal case management, including intake, and referral services to all tenants needing assistance.
- Assessing the health, psychological and social needs of residents, and development of individualize supportive services plan to identify and reach resident identified goals.
- Monitoring of supportive services plan and provide progress updates to resident and other individuals/agencies involved in care.
- Development and coordination of onsite workshops and presentations specific to tenant interests and needs.
- Develop a support network of community agencies encompassing general community service support agencies, including but not limited to benefit and entitlement services, transportation, financial and

budgeting services, counseling services, preventative health services, legal services, advocacy services, employment services and vocational services.
- Communicates frequently with onsite management team on necessary property updates and resident needs to best support the tenants at the Project.

Service Coordinators have obtained a Bachelor's degree in social work, sociology, psychology or related field or have an equivalent combination of education and/or experience with at least 3 years' of related experience, to include experience working with adults with disabilities, and/or individuals or families experiencing homelessness or at risk of homelessness, and/or older adults, and/or veterans. Service Coordinators will also have working knowledge of supportive services and other resources for the targeted population of the community.

All Service Coordinators at LSS obtain and complete training on an annual basis, and follow the guidelines set in place by the Department of Housing and Urban Development (HUD) for the Service Coordination program. New Services Coordinators within their first year, will obtain at least 36 hours of training in identified categories outlined by HUD. After the Service Coordinator's first year, the service coordinator is required to obtain at least 12 hours of training in HUD approved training categories each year.

5. The Service Coordinator will facilitate programming and supportive services for the project. This will be done through:
    - Regular onsite visits by the assigned Service Coordinator for the term of contracted agreement. An assigned service coordinator will be available by telephone and email outside of designated times.
    - Facilitation of an annual meeting where tenants and the management company can meet to discuss any concerns, updates or needs.
    - Scheduling of quarterly education services with an emphasis on presentations and/or workshops designated to assisted individuals/families whom have experienced homelessness and individuals with disabilities in overcoming barriers as identified on the tenant's assessments and supportive services plans.
    - Lutheran Social Services will also provide Service Coordination to the property. Additional wraparound services will be provided in collaboration with a range of local providers that already serve the targeted population in Dane County.

Lutheran Social Services (LSS) believes that even the service coordinator is apart of the management team. The importance of establishing and maintaining mutually respectful relationships with our tenants is stressed. Service Coordination plays a vital role in this approach. We believe in the importance of ensuring the tenants have a well rounded experience that results in their desire to stay at our properties long term, and feel strongly service provision results in a lower vacancy rate. In the last three years, tenants who have received a housing lease violation, engaged with LSS's services, had a 90.2% retention rate at the property. In addition, tenants who engage with LSS services, remain in their leave on average at the community, for 5.3 years.

Network and Referral Sources

LSS will work and support management in obtaining referrals of individuals who are experiencing homelessness, in coordination with the Dane County Homelessness Consortium and the Dane County VA. Referrals will be chosen systematically based off qualifying factors for the open units. Individuals and families referred will have met the definition of the Target Population. The referral process will be modeled after existing processes and procedures established in the county's supported by the local coalition.

In partnership with management, LSS will also support and collaborate with Dane County and associated providers, Dane County Aging and Disability Resource Centers , the Wisconsin Department of Health Services and local Managed Care Organizations to market availability of units for persons with disabilities.

Specialized Services / Supportive Services Activities

Tenants will have access to supportive services through an LSS Service Coordinator who will help to address their specific challenges, and arrange services, that they may learn the skills necessary to develop and maintain a healthy, stable lifestyle. A designated Service Coordinator will be responsible for linking the target population at the site to specialized, supportive or advocacy services in the general community for which they are entitled, with a desired outcome of keeping them independent in their units. LSS will be on-site and will work with residents to identify funding sources and develop an on-going Supportive Services Plan, based on needs of the tenants, to ensure supportive services are made available to the tenants.

Community-based service providers and LSS will provide services which may include, but are not limited to, the following:

- Completion of an intake assessment by the Service Coordinator. The Service Coordinator will make reasonable effort to engage residents in this process. It is understood and agreed that the resident must voluntarily agree to participation in the process.
- Development of a case management plan with identified goals to meet the resident's objectives. This plan may include referral to other resources, including the Disability Resource Center, Department of Vocational Rehabilitation, local job centers, and other community supports. Specific services will include linking residents with programs that support independence and self-sufficiency, employment opportunities and financial assistance management.
- The scheduling of regular educational services with an emphasis on presentations designed to assist residents in overcoming barriers as identified on the tenant assessments. Potential sessions include self-improvement, employment opportunities, accessing public benefits, health and wellness, and financial management.

The goal of these supportive services is to enhance the success of resident to promote their ability to remain a tenant at the development. The services identified above will enhance independent living success and promote dignity of residents by addressing needs with a one-on-one approach.

Specialized Services Permanent Supportive Housing:

This project will set aside sixteen (16) as permanent supportive housing for individuals with disabilities and/or those who have been homeless. These units will be affordable to those at or below 30% AMI.

Community-based service providers and Lutheran Social Services (LSS) will provide onsite wraparound services, to include the following:

- Workshops on financial literacy, accessing public benefits, health and wellness, and other topics based on resident interest.
- One-on-one services tailored to resident need with development of a case management service plan to such as access and information supporting health care, mental health and substance abuse needs, benefit and insurance support, health and wellness information and referrals, access to employment or life skills assistance, and assistance pursuing higher education.

These services will be available to all tenants regardless of income and will not be a condition of tenancy. Wraparound services will be provided independently of the project's operating budget in collaboration with a range of local services providers.

Services will be designed to increase housing stability by addressing social and economic barriers to housing retention. Social factors include chronic health conditions, AODA concerns, and mental health conditions, all of which will be addressed through case management and/or referrals to outside clinical providers. Economic barriers, including lack of employment, educational disparities, and benefits eligibility/access, will be addressed through one-on-one counseling, coaching, and referrals. Addressing these root causes of housing instability will maximize residents' chances of successfully retaining housing.

Lutheran Social Services is well-versed in permanent supportive housing. In addition to providing rapid rehousing services, LSS has helped numerous individuals and families transition out of homelessness by providing some or all of the following services (funded independently of individual housing developments):

- Helping individuals identify housing for which they are eligible

- Providing financial assistance with moving costs, security deposits, and rent
- Providing case management and individualized service plans to meet larger goals and maintain permanency
- Providing referrals to community resources, such as job centers, to create long term family stability.

LSS also provides critical supportive services including care coordination for individuals with disabilities, substance abuse recovery, and mental health services. LSS works with local Continuums of Care to identify individuals on the homelessness prioritization list who may be eligible for appropriate LIHTC housing and supports these individuals until they are stably housed. LSS service coordinators provide ongoing services at specific residential developments, including services for veterans and eviction support services. Services will be designed to increase housing stability by addressing social and economic barriers to housing retention. Social factors include chronic health conditions, AODA concerns, and mental health conditions, all of which will be addressed through case management and/or referrals to outside clinical providers. Economic barriers, including lack of employment, educational disparities, and benefits eligibility/access, will be addressed through one-on-one counseling, coaching, and referrals. Addressing these root causes of housing instability will maximize residents' chances of successfully retaining housing.

Resident Assessment and Access to Services

Supportive services will be made available without restriction to any tenant that wishes to engage with the LSS provider. The program is resident-driven and tailored to each resident's individual needs. Utilizing supportive services is voluntary and is not a condition of tenancy. Preferences and priority will be made to individuals meeting the targeted population and services will be tailored to support the identified needs of these populations.

Service Provision / Coordination

Supportive services to residents will be provided by an LSS Service Coordinator on a voluntary, as needed basis and take a proactive and collaborative approach in assessing residents' needs. The designated Service Coordinator will work to help identify, access and coordinate services for residents that can help them identify and support the resident's identified objectives and support the resident's ongoing success as a tenant at United Residences. The service coordinator can provide assistance in targeted supportive services categories to meet the needs of residents to maintain housing.

Outreach Strategies

LSS will establish a regular schedule of on or off-site schedule to meet with tenants to ensure introduction to, on-going management of, and completion of supportive services programs. Residents will be made aware of the array of services available to them upon move in, or during their new resident orientation. Residents will also be reminded of service opportunities through resident newsletters, calendars, and flyers posted at mailboxes and near entry doors.

Funding Sources

LSS Service Coordination staff will help residents connect with public assistance programs that they may be eligible for.

Rental Assistance Resources

Program requirements dictate tenants must meet income requirements to be eligible for the project. Project will accept rental assistance as a payment source.

Supportive Housing Proposal / Memorandum of Understanding For United Residences Madison, WI

This SUPPORTIVE HOUSING PROPOSAL/ MEMORANDUM OF UNDERSTANDING (this "**MOU**") is hereby made and entered into by and between Lutheran Social Services (hereinafter "**LSS**"), Northpointe Development II Corporation (hereinafter "**NPII**") and ACC Management (hereafter "**ACC**") for the purposes of creating a Supportive Housing Proposal/ MOU for the United Residences in Madison.

Lutheran Social Services (LSS) represents that it has substantial skill and experience in assisting organizations to provide social and case management services to residents of housing complexes in numerous locations throughout Wisconsin and Upper Michigan, including in Dane County. LSS also confirms the details in the Dane County ADHF Application and the commitment to end homelessness as well as the supportive services plan.

Designation of Units:

LSS's services will target the tenants residing in the project's set aside units, who require and request access to supportive services to maintain housing. The target population will be specific Homeless, at Risk of Homelessness and to any individual(s) with permanent developmental, physical, sensory, medical or mental health disabilities, or a combination of impairments that make them eligible for long-term care services as well as disabled veterans.

There is clearly a need for affordable housing in Dane County and specifically those with disabilities. Currently there are 498 individuals and 66 families listed on the Dane County Homeless Consortium's webpage many of which would meet the definition of the target population. Also, according to the United States Census Bureau, Dane County has a large population of military personnel who served in the Vietnam War, many of which would meet the definition of the target population. The project's Market Study will further define the housing priorities and needs.

NPII will develop the project and the project will provide affordable housing options for individuals at or below 30% CMI,50% CMI, and 80% CMI. The property will have a total of 80 units of which 16 units, will be set-a-side for the target population at or below the 30% CMI level. All parties to this MOU acknowledge that the supportive housing units set-a-side will be defined as such in the Land Use Restriction Agreement and that all of the set-a-side units will be designed with universal design features.

Provision/ Scope of Services:

LSS will provide in person, onsite supportive service provision at United Residences. These services will be delivered in the supportive service office at the property.

LSS will designate a Service Coordinator to United Residences, and will be responsible for providing the target population at the site with care coordination, supportive, referral and advocacy services in the general community for which they are entitled, with a desired outcome of keeping them independent in their units. Specific services to be offered under this agreement include:

- Established open office hours onsite at United Residences to conduct individualized, one-to-one supportive services. Services will be targeted to the tenants residing at the project's sixteen (16) 30% AMI set aside units, but will be available to all tenants residing in the project's remaining affordable units. LSS will be provided a designated office space for supportive services programming at United Residences, that is private and accessible to all tenants at the property.

- Completion of an intake and needs assessment for tenants seeking service coordination services. The Service Coordinator will make reasonable attempts to engage the target population residing in the projects set aside units in a person-centered intake process. This assessment will provide necessary information about a tenant's needs, challenges, and circumstances. It is understood and agreed that the tenant must voluntarily agree to participation in services.

- Development of a supportive housing management plan for tenants who completed the intake assessment. This plan provides an outline for both the tenant and service coordinator in addressing the tenant's needs, ensuring services are targeted, coordinated, and effectively meeting the tenant's identified goals. Plans specifically include tenant's strengths, goals and objectives, tenant and service coordinator responsibilities in supporting the plan, and agreed upon by both the tenant and service coordinator to ensure a successful outcome and achievement of goals. LSS encourages and promotes, minimally, monthly contact with the Service Coordinator, for tenants who have an active supportive housing management plan.

- Provide supportive programming and direct services to tenants that are individualized to support the tenant's supportive housing management plan. This will be accomplished by:

    - The assigned Service Coordinator will provide one to three site visits during the pre-lease-up phase of the development. After the initial lease-up of the project, the assigned Service Coordinator will operate onsite at The United Residences weekly.

    - Providing specific supportive services to support tenant independence and self-sufficiency in identified needs areas on the individuals supportive housing plan. This may include care coordination and referrals to community resources or provision of direct services to best meet the tenant's goal(s). Follow up and aftercare is provided to ensure the support is meeting the tenant's needs on an ongoing basis. Specific supportive services provided include:

        - <u>Employment and Educational Assistance</u>: resume building, interview skills, completing employment applications professionally, enrollment in English as a Second Language courses, GED, post-secondary, and/or higher education programs, scholarship research, assistance with scholarship applications, accessing job training programs, identifying suitable job opportunities and navigating unemployment benefit applications.
        - <u>Life Skill Development</u>: communication, problem-solving, decision-making, time management, coping mechanisms, social skills, self-advocacy, and health literacy
        - <u>Physical and Mental Health Support</u>: care coordination, behavioral support, utilization management, and provider information and referral services
        - <u>Substance Use Treatment Services and Referrals</u>
        - <u>Assistance in Accessing Benefit and/or Entitlement Services</u>: completion of benefit checklists to determine eligibility and need for services/programs, assistance accessing, applying, and renewing public assistance benefits including Medicaid, Supplemental Security Income (SSI/SSDI), and Supplemental Nutrition Assistance Program (SNAP), and benefit coordination support and education
        - <u>Healthy and Nutritional Living</u>: coordinating care, referrals and support for tenants seeking to improve their health in areas such as nutritional counseling, fitness routines/physical activity, smoking cessation, and weight management
        - <u>Eviction Protection-</u> Utilizing available funds to assist tenants experiencing financial hardship

- Financial Literacy: support tenants to improve financial literacy through education and guidance in budgeting and developing a savings plan. Services also include coordination and referrals to financial counselors to enhance financial literacy skills such as debt management, investing, and credit repair and building.

- LSS will provide bi-annual educational and/or wellness services with an emphasis on presentations designed to assist in overcoming barriers as identified on the tenant assessments. Potential sessions include self- improvement, employment and educational opportunities and financial management, and developing relationships with local community, county, and state resources who provide support to the targeted population.

- Tenants will initially be made aware of the supportive services available to them upon move in, or during their new resident orientation if residing in a supportive unit. The Service Coordinator will make contact with all new tenants that move into a supportive unit, within 14 days of moving into the community, to make an introduction and provide further information on accessing and obtaining services. LSS will routinely market services to all tenants onsite through resident newsletters, calendars, and flyers posted near commons spaces at United Residneces. LSS's Service Coordinator's working hours and contact information will be posted clearly for tenants, to ensure clear access to services when needed. LSS Services are available, without restriction, to any tenant that wishes to engage with the LSS Service Coordinator. Utilization of services is not a condition of tenancy.

- The LSS Service Coordinator is identified as part of the projects management team. LSS will maintain regular communication with property management to maintain awareness and updates on supportive unit move ins and move outs. The LSS Service Coordinator will willingly participate in and facilitate engagement with the property manager and will be included in property team meetings that include site-based team members supporting United Residences. These meetings will focus on general property updates, concerns related to tenant health and safety, information on lease violation notices provided to tenants, and additional topics as needed where the onsite service coordinator can be of support.

Marketing Plan

LSS agrees to assist the property management group in filling vacant units with outreach and engagement efforts with community partners and agencies that provide long-term support specifically to the targeted population. This is done to raise awareness of the specific opportunities available to the target population. Such agencies or partners could include: Aging and Disability Resource Centers, Managed Care Organizations, Health and Human Services agencies, and other providers supporting the targeted population(s) for this project. This also includes working with the Dane County VA for the targeted population as well as the veteran specific units that have been set aside at 50% CMI.

LSS, NPII, and ACC have worked together to develop a Resident Selection Criteria policy with defines the property's Eligibility Screening and Assessment procedures to affirmatively market units specifically for the target population being proposed for the units at this project.

4 months prior to occupancy all parties to this MOU will start meeting weekly to discuss referrals, outreach, applications and screening. LSS will cordinate with ACC on which units are still available and send referrals. Those referals will get assistance from LSS to work through the application screening process. On-going the property manager and LSS will work together with existing tenants move out and new tenants are needed to fill the units.

ACC will list vacant supportive units on Wisconsin Housing Search. LSS and ACC will establish a waiting list policy specifically designed for the target population that details interested households as well as the referral process for the targeted population.

The goal of the Service Coordinator is to enhance the success of tenants residing in the supportive housing units and to promote their ability to remain in their unit successfully. The services identified above will enhance independent living success and promote dignity of residents by addressing needs with a one-on-one approach.

Annual Budget

The budgeted expense for providing Service Coordination as above is $40,000 annually with a commitment to deliver the services to the project for the 30-year compliance period. A detailed budget is attached as exhibit A, however excess funds committed to LSS annually can be used for a range of services noted above . These amounts will be paid by project operations through ACC Management with invoices submitted to Chris Hand to LSS commencing with certificate of occupancy for the named project, and monthly thereafter, as indicated above.

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

NORTHPOINTE DEVELOPMENT II CORPORATION

Signature: ______________ Title: Secretary Date: 8/1/2025

ACC MANAGEMENT

Signature: ______________ Title: President Date: 8/1/2025

LUTHERAN SOCIAL SERVICES OF WISCONSIN AND UPPER MICHIGAN, INC.

Signature: ______________ Title: Vice President Date: 8/1/2025

Lutheran Social Services of WI & Upper MI, Inc.
8hrs/week - Madison, WI
Year 1

Direct Expenses	**Year 1**
Positions/Salaries	
Service Coordinator - 8 hrs/week (0.2FTE)	$9,568.00
Supervision	$1,435.20
Total Salaries	$11,003.20
Fringe Benefits	$3,300.96
Communication Costs	$230.00
Training, Memberships, Professional Activiity	$175.00
Insurance and Indemnification	$429.00
Material and Supplies	$750.00
Small Equipment/Hardware/Software	$140.00
Travel	$550.00
Audit Fees	$207.00
Direct Business Services (Billing, IT Direct Support & Quality Analysis)	$500.00
Subtotal Direct Expenses	$17,285.16
Indirect Expenses	
General & Administrative	$2,333.50
Total Expenses	**$19,618.66**

Housing Service Coordination

Lutheran Social Services of Wisconsin and Upper Michigan

Our Service Coordination Program for housing is designed to help residents live comfortably and independently with the help of supportive services. We have been providing service coordination to residential communities throughout Wisconsin and Upper Michigan for more than 25 years.

Our Service Coordination program has an over 90% satisfaction rating among the residents of properties we serve, which include older adults, adults with disabilities, families, veteran populations and individuals experiencing homelessness. Partners with LSS receive service provision reports and quality assurance reviews on an ongoing basis. LSS will work with you to develop programming to meet your resident's needs. LSS will partner and provide expert experience in the following housing service provision program fields:

- **Multi-Family Housing Service Coordination (MFSC)**
- **Public Housing: Resident Opportunities and Self Sufficiency (ROSS)**
- **Family Self Sufficiency (FSS)**
- **Low Income Housing Tax Credit (LIHTC) Service Provision**
- **AHP Empowerment Services**
- **Rural Development**

Service Coordinators act as:

- Investigators
- Educators
- Community Builders
- Advocates
- Service Facilitators

Empowerment Agents

Our service coordinators help people take control of their lives so they can become independent, productive members of the community. Based on their interests, we offer help in the following areas:

- Adult Education— to support individual's educational interests and employment goals
- Financial Literacy — budget and debt counseling, debt management plans, bankruptcy counseling and education, credit report review and financial education
- Employment Services — a variety of services to help people find employment that fits their interests and abilities, including vocational/job training, resume development, volunteer opportunities and interview skills
- Access to Benefits — help applying for and understanding government-funded benefits or other public or private insurance/benefit plans

Make a difference at your property:

- Increase length of residency by over 6 years
- Reduce the need for older residents to be admitted to higher levels of care
- Decrease resident evictions and turnovers
- Relieve burden on property managers
- Create and enhance informal support networks
- Provide more than 20 different types of individualized services

From a Property Owner:

"LSS is a wonderful organization to have as a partner in serving resident populations and helping individuals remain independent with a great quality of life. LSS Service Coordinators are dedicated, caring and mindful. LSS delivers professional, committed oversight evident in their communications, quality assurance reviews, and reporting."

For additional information please contact:

Leah Gubin, Housing Service Provision Manager
920-312-4835
Leah.Gubin@lsswis.org
www.lsswis.org/housing







WE ARE LUTHERAN SOCIAL SERVICES OF WISCONSIN AND UPPER MICHIGAN


Lutheran Social Services
of Wisconsin and Upper Michigan, Inc.

A LETTER FROM OUR PRESIDENT AND CEO

Dear friends,

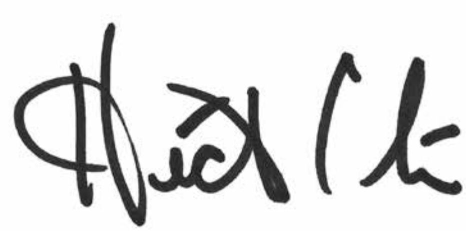
Many people in Wisconsin and Upper Michigan are faced with challenges, including struggles with behavioral health issues, living with disabilities, alcohol consumption rates that are higher than the national average and a significant increase in the proportion of deaths related to the use of opioids. But these individuals and their families are not alone. Lutheran Social Services of Wisconsin and Upper Michigan (LSS) is here to help.

Whether it is a child in crisis, a family in turmoil, a young woman who is struggling with addiction or a refugee family seeking to make a new life in a new home, LSS has been a welcoming and trusted place to turn to for assistance. Individuals in our community rely on our organization to help remove barriers and improve their quality of life. If not for organizations like ours, they would be left unserved and their needs unmet. Our services impact 37,000 individuals each year throughout Wisconsin and Upper Michigan, and the vast majority of those people have indicated we have improved their quality of life and are satisfied with our services.

Since 1882, we have empowered communities to better their health and well-being. As we continue to advance our mission, we look forward to working with our partners to create healthy communities filled with people using their God-given gifts to serve. Together we believe we can strengthen and broaden our impact in the next 100 years.

Thank you for your continued support.

Sincerely,



Héctor Colón
President & CEO

WHO WE ARE, WHO WE HELP & HOW WE DO IT

Everyone deserves a chance to live a safe and healthy life no matter what challenges they face. The dedicated team of LSS employees and our trusted partners are committed to helping individuals and families do just that.

Our specially trained staff comes from diverse backgrounds, and together we are driven by a singular goal of helping people receive the support they need to thrive. Individuals and families who come to LSS for help often benefit from:

- Screening and assessments/care plans
- Case management/care coordination
- Counseling/therapy
- Skills development
- Housing/respite
- And much more

Working side by side with those we serve, our staff takes a holistic approach to each unique situation. Identifying needs for today and looking at what future needs may arise is important in every case because we believe in being a resource to people across their lifespans.

Through the services we provide directly and through the referrals that we make, our staff are experts at removing barriers so the individuals and families who turn to us for help can achieve their health and well-being goals.

Learn more about how we serve through community-based services, residential services and housing programs when you turn the page.

Our Mission
Act compassionately.
Serve humbly.
Lead courageously.

Our Vision
Healthy communities filled with people using their God-given gifts to serve.

Our Guiding Philosophy
Servant Leadership

Our Core Belief
We believe in the infinite worth of every person.

Our Core Values

Compassion: We believe each individual's situation is unique and personal. By accompanying them on their journey, we're better able to show love, dignity and respect.

Co-Creation: We believe we are stronger working together. We combine our unique gifts with those of others to serve a greater good, strengthening the whole community as a result.

Courage: We believe leadership takes courage. We explore options that challenge the status quo and better enable us to assist others in reaching their objectives.

Change: We believe curiosity helps us to find better ways to make an impact. We make change possible by reading what's on the horizon and embracing bold new ideas.

COMMUNITY-BASED SERVICES

Home is where the heart is. LSS also believes home is where individuals and families should be able to access the services they need to live their healthiest, safest, and most independent and fulfilling lives. We help connect people of all ages and who have a variety of different needs with life-changing services, resources and expertise to address the challenges they face. This includes, but is not limited to:

Behavioral Health and Recovery

For individuals and families facing mental health and/or substance use problems, LSS can assist them on their journeys to recovery. All of our programs are offered in a welcoming and confidential setting. They encourage creating healthy relationships and keeping families together, while also empowering those who turn to us for help with tools and resources for recovery. Programs available include:

- Comprehensive Community Services
- Family Preservation
- School-Centered Mental Health
- Family Partnerships Initiative/Youth Enterprise for Success

Developmental Health and Supportive Services

LSS is committed to helping people of all ages thrive in their homes or residences. From working with infants, toddlers and children who are living with developmental delays and disabilities to assisting older adults overcome obstacles and enjoy life to the fullest, our array of programs can provide support across a person's lifespan. Individuals and families often benefit from programs such as:

- Birth to 3
- Children's Long-Term Support
- Community Supported Living
- Day Services

Restorative Justice

Supporting individuals, especially those with mental illness and/or substance use, as they transition back into their communities after involvement with the criminal justice system is extremely important. Not only does this create positive life experiences but also empowers them to become successful contributing members of their communities. LSS is recognized as a leader in restorative justice as a result of our high rates of success through programs such as:

- Conditional Release
- Opening Avenues to Re-Entry Success (OARS)
- Outpatient Competency Restoration Program

Refugee Resettlement

LSS is proud to provide comprehensive resettlement services to refugees fleeing from war and persecution around the globe. Since 1974, we have started more than 10,000 refugees on a new life in the U.S. Our diverse team partners with refugees and empowers them in becoming independent, vibrant members of our communities.

Foster Care and Adoption

In cases where, for their own well-being, a child cannot remain with their family, foster care is a critical resource for providing much-needed love, structure and safety. Our specially selected and trained foster parents understand the importance of patience, acceptance and the gift of love. LSS is one of the largest non-profit licensed adoption agencies in Wisconsin, providing forever families for children.

The Rewards of Foster Care Keep on Giving

Just weeks after her mother's passing, Spring turned to her partner, Nick, and said, "I want to be a foster parent." Not words you would typically expect to hear from a 25 year old. But having been a foster child who was later adopted by her late mother and father, who passed just four years earlier, Spring knew this was something she wanted to do.

"All I knew is that I was able to be adopted by my parents through Lutheran Social Services, so I contacted them," she recalls.

After meeting all the necessary requirements and training to become licensed foster parents, Spring and Nick received their first foster placement. The little boy with a love for "big words" was in need of short-term respite care and stayed with Spring and Nick for just a week. During his time in their home, Spring and Nick provided the love, encouragement and guidance he needed, and she gave him a new word to add to his vocabulary: resilient. "You are resilient," Spring told the child.

"It was a rewarding experience to be there and support this little one, even if it was for only a short time," she explains. Both Spring and Nick look forward to helping other foster children learn not only "big words" but also skills and tools to take a positive approach to life.

IRIS Connections

The lack or loss of personal independence resulting from a disability or the effects of aging can be frustrating and devastating. LSS supports older adults and individuals living with disabilities in making meaningful choices to live the life they choose and achieve their goals through our IRIS (Include, Respect, I Self-Direct) Connections program. To learn about IRIS Connections eligibility, contact the Aging and Disability Resource Center:
www.dhs.wisconsin.gov/adrc
DHSwebmaster@dhs.wisconsin.gov
608-266-1865 | TTY: 711 or 800-947-3529

Find more information about IRIS Connections at www.connectionswis.org.

"Jodi always told me, 'Everything is going to be OK,' and now it really was!"

Rosetta, Connections Participant

Helping Rosetta Move Forward

With a sigh, Rosetta wheeled her oxygen tank alongside her as she attempted to leave her apartment with her daughter and grandson. When she lit her first cigarette at age 16, she never thought of COPD or how it would change her life later. Walking around had become a daily struggle. But this particular outing would prove to be a step toward a happier life.

A sign for the Department of Aging caught her grandson's eye. "Granny, you should contact them to see if they can help," he said. Since she was now over age 60, Rosetta called.

After speaking with the staff, they determined Rosetta was eligible for assistance and could benefit from the IRIS Connections program. Soon she was connected with Jodi, a consultant from LSS's IRIS team who conducted an assessment and worked with Rosetta to set up a plan. "Everything is going to be OK," Jodi said.

Rosetta desperately wanted a mobility chair to help her not only move around her apartment with ease but to also get back out into the community she loved. Four times her requests for a chair were denied. But Jodi reassured Rosetta that "everything is going to be OK."

With encouragement from Jodi and help from the Accessibility team and her primary care doctor, Rosetta made one more request for a chair. When the phone rang, she was certain it was the same bad news she heard before. When the man on the phone asked if he could drop off Rosetta's new chair on Friday, she thought she was dreaming. Rosetta's request was approved!

"The first person I called when I found out I was getting my chair was Jodi," Rosetta recalls. "She always told me, 'Everything is going to OK,' and now it really was!" With the help of LSS, Rosetta is now able to move forward with her life.

RESIDENTIAL SERVICES & HOUSING PROGRAMS

Having a place to call home is something most people take for granted. But there are many children, adolescents and adults of all ages who turn to LSS for help finding a safe and healthy place to live and/or accessing recovery services as they work toward making positive changes in their lives.

Residential Services

LSS provides a variety of residential services designed to help and support youth and adults affected by mental health issues, as well as drug and alcohol use or other challenges. For some, a residential program is where people start their recovery journey, and for others, it is a place people may return to from time to time, depending on their needs. Our goal is to create a safe environment where we can give each person who comes to us for help the knowledge and tools to live a healthy life and thrive. Programs available include:

- Community-Based Residential Treatment Facilities (adult—mental health and substance abuse)
- Group Homes
- Youth Residential and Shelter Care
- Homme Youth & Family Programs

Housing Services

LSS offers a variety of housing assistance options to individuals and families in need, including people with disabilities, older adults and those experiencing homelessness. We look at the unique circumstances in each case and help connect people with the most appropriate solutions through programs such as:

- Subsidized housing in cooperation with the US Department of Housing and Urban Development
- Service coordination offered within multi-family developments
- Affordable housing through the Low Income Housing Tax Credit (LIHTC) program
- Homelessness transition services

Dave Found His Home As a Teacher At Homme

When Dave accepted the Homme Youth & Family Programs' shop teacher position, he informed the principal he would be leaving after three years. Little did Dave know those three years would turn into a rewarding career lasting more than three decades!

Dave admits he came from "kind of a rough background," so he can relate to the youth who enter his shop class. "I really enjoy what I do. That's a big part of working at a facility like this with these types of kids," he explains.

His wife, who is also a teacher with Homme, would agree. Like all of the Homme teachers, Dave is special education certified and trained in trauma-informed care to safely assist youth when intervention is needed.

As a father with five children, Dave would like parents to know the Homme staff treats youth in their care as if the kids were their own. "The people here who are responsible for these children show them a lot of love," Dave describes.

"The people here who are responsible for these children show them a lot of love."

Dave, LSS Teacher

Lutheran Social Services
of Wisconsin and Upper Michigan, Inc.

About Us

Lutheran Social Services is one of the largest and most experienced health and human services organizations in the Midwest. Our services extend across Wisconsin and Upper Michigan and along the lifespan of over 37,000 individuals.

We are building healthy communities with services as essential as housing and life-changing as foster care. Individuals in our communities rely on organizations like Lutheran Social Services to help remove barriers and improve the quality of their lives. If not for organizations like ours, they would be left unserved and their needs unmet.

Stay in Touch

6737 W. Washington St. | Suite #2275 | West Allis, WI 53214
lsswis.org | (414) 246-2300 | info@lsswis.org

Lutheran Social Services
of Wisconsin and Upper Michigan, Inc.

140 Years

Act · Serve · Lead

EST. 1882

Community Impact Report 2022

Your Love Transforms Lives

Your Love TRANSFORMS LIVES

2022 was a year of celebration for LSS as we commemorated 140 years of Servant-Leadership!

Just feet away from the original Homme Homes founded by Rev. E.J. Homme, we joyfully rang the large, on-site school/church bell fourteen times: once for each decade that our LSS family of supporters have shown mercy and love to the hungry, meek, mourning, and persecuted (Matthew 5: 3-12). As we look to our Sesquicentennial, one additional ring of the historic bell affirmed our shared hope and gratitude for the future LSS.

The many activities, events, and heartfelt stories that occurred over our special anniversary year have more than doubled the size of this year's impact report. We travelled our two-state reach meeting up with you, our donors, funders, community partners, volunteers, and friends. Thank you for sharing your personal experiences with LSS. We are in awe of the countless ways you have strengthened families, inspired recovery, and empowered independence and belonging.

We encourage you to find special time to page through and savor the pictures and stories in this report told by our clients, partners, and advocates. Your love is in every one of these stories.

Dear Friends,

You are living proof of Rev. Homme's legacy of love!

Thank you for your compassionate assurance that individuals and families in Wisconsin and Upper Michigan have safe and affordable housing.

Thank you for your belief in the infinite worth of all people, especially our clients who are elderly, and/or living with a developmental or physical disability.

Thank you for your immediate and generous response to the hundreds of Afghans forced to relocate from their homeland to Wisconsin.

Thank you for your help in reducing stigma around mental illness and substance use disorder throughout our two-state reach. We are most grateful for your collaboration around growing our residential treatment and School-Centered Mental Health programs.

The state of LSS is strong. Our collective work in 2022 has forged innovative partnerships, solidified funder relationships, improved client outcomes, impacted colleague financial health and overall well-being, and activated our donor's extraordinary benevolence.

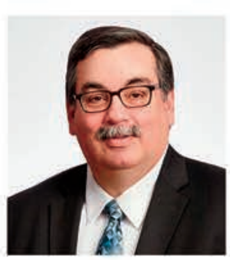
Our mission carries on through your acts of compassion, humble service, and courageous leadership.

A profound end to our anniversary year gave us the opportunity to honor and celebrate the life of Bela Maroti, Founder of the LSS Foundation. Bela died on December 13th leaving a 50-year-legacy of hope and impact on thousands of lives because of his "yes" to using his God-given gifts to serve others.

Bela was both a guidepost and a beacon for LSS and the LSS Foundation. He was advisor, advocate, and champion in helping to shape our programs. Through his visionary, Servant-Leadership, he recognized the need for long-term financial support of our mission work through planned gifts, investments, and endowment.

Thank you for your continued interest in, and love for, LSS and the nearly 30,000 people we serve each year. We are excited about the many ways we will grow our legacy of love together for future generations.

Héctor Colón
President & CEO



José Olivieri
Operating Board Chair

Your Love STRENGTHENS FAMILIES

"Our son Dawson was diagnosed at birth with Trisomy 21 - Down Syndrome, and while we had known of the high likelihood since our genetic screening early in my pregnancy, that official confirmation came with a wave of fears.

"The minute we met Sue from Lutheran Social Services of Wisconsin & Upper Michigan, our hearts calmed down. **The LSS team became our anchor in a storm.** They reminded us to celebrate Dawson's "terrible yet typical twos," taught us how we could help Dawson, and reminded us when we should step back and let him do things so he can move ahead.

"By the time Dawson graduated from the LSS Waukesha County Birth to Three program **we felt specially equipped as parents to handle the needs that Dawson would have."**

- Rhonda Schmidt, parent in LSS Waukesha Birth to Three program.

Tia* has been living with an LSS foster family for a little more than a year. Like most children in foster care, Tia has suffered trauma and difficult times. But she is not letting the difficulties of the past define her future. Tia is embracing new beginnings and transformation!

Soon Tia will graduate high school and turn 18. She has been looking at colleges and already applied to a few that offered to waive application fees. She would like to pursue the social work field because of the LSS and school social workers who have been such a tremendous help to her. **Tia is well on her way to a bright future in other ways as well.**

Knowing that she will soon age out of foster care, her foster parents shared with her their plan to pursue adoption once she turns 18. **Tia will have a forever support system and family, even after graduation.**

**Name changed to protect client confidentiality.*

"Families who have children with disabilities have to navigate the resources available. To have a team come to our home, become our family and support system, to offer advice and guidance as we figured out the first few years, is an experience we will never forget."

- Rhonda Schmidt, parent in LSS Waukesha Birth to Three program.

Your Love INSPIRES RECOVERY

When children returned to school post-pandemic, third grader, Tomás*, experienced intense debilitating anxiety being separated from his parents. This made attending school and learning nearly impossible for him. **Tomás would try to participate, but he was so overcome with anxiety he became physically ill and endangered his own safety by running out of the building into the street.**

With the help and guidance of LSS therapists at his school, Tomás worked through a course of cognitive behavioral therapy, specifically exposure and response prevention treatment, which allowed him to face his fears in a gradual manner. In addition, our family coach provided translation services and called the family in between sessions to ask about progress on the therapy homework assigned. Our coach also provided recommendations from the therapists on how to support the exposure therapy at home and assisted the family in connecting with other community resources.

Today, Tomás fully participates in class and interacts with his friends again. At the end of treatment, he described himself as "happy" and "proud" of what he overcame.

**Name changed to protect client confidentiality.*

Jesse's* drug dependency stripped him of his good judgement which affected his parenting ability. **He sometimes took his children with him to buy drugs or he would leave them at home alone.** His amphetamine addiction exacerbated his mental health challenges. Upon admission to the LSS Aspen Center Jesse embarked on an individualized treatment plan.

Eventually, he was able to reunite with his children during family visits and work on those relationships. By connecting with local 12-step programs, he started to build a strong support system. After reaching several milestones, Jesse completed the program and was discharged to a sober living facility. **He is employed and remains actively engaged in his recovery.** He participates in outpatient group therapy and attends to his mental health.

**Name changed to protect client confidentiality.*

"What brought me here? Drinking was the major factor. In the Air Force I was athletic. I never used any drugs or alcohol much. But I had an accident in Thailand during the Vietnam conflict. My fuel truck turned over on me during a bad rainstorm. I was trapped in a river of excrement. Afterwards, I would have bad dreams. I would drink to go to sleep. Now I work out and do art instead of lying on the floor passed out. I haven't drank or taken illegal drugs in over a year. This is a life changing place."

- Lewis Boyles, LSS Veterans Homeless Services

Your Love EMPOWERS INDEPENDENCE AND BELONGING

Arif and his family were resettled by LSS when Afghanistan was evacuated. Arif, a quadriplegic, was in very ill health and experiencing severe bedsores. **His extended family did all they could, but immediate medical care was needed.**

The medical team determined that **Arif would greatly benefit from a specialized wheelchair, which was quite expensive.** Hearing about Arif's situation, LSS Mission Champion Kyle Weatherly vowed to help make it happen.

After months of red tape, **Arif received his wheelchair.** He and his extended family are living in an LSS residential community, and Arif is working as a translator with the LSS Refugee Resettlement team!

Mitch*, an Upper Peninsula high school student, was living in a tent for two months, and missed his graduation. **His temper and behavior were holding him back in gaining employment.** LSS counselors found stable housing for Mitch, guided him to obtain his GED, and connected him to a community resource that assessed his job readiness and provided soft skill training. **Mitch is now feeling less anxious, more confident and is in a much better place to navigate his path to adulthood.**

**Name changed to protect client confidentiality.*

Your welcoming embrace of the families and individuals evacuated from Afghanistan eased their transition to life in the United States.

- In other parts of the country, some Afghans spent one to four months in a hotel, waiting for housing. Because of your generosity, **every Afghan served by LSS had an apartment within one week of their arrival.**
- **Each household received a Chromebook** to facilitate job searches and online courses in driver's education and English as a Second Language.
- Each household received **two cell phones**: one that can be taken to work, and one for the home in case of emergency.
- Many Afghan evacuees arrived with nothing but the clothes on their backs. **Gift cards for new arrivals allowed recipients to shop for themselves, conferring dignity and respect.**
- Rental assistance, dental care, baby formula, diapers and more – your support filled (and continues to fill) gaps related to bureaucratic wait times, the pandemic, and other unforeseen circumstances.

Jason* had nowhere to live ... no family ... no one to rely on. He had recently been diagnosed with cancer. He was lonely and feeling desperate. Then he found LSS Gaining Ground.

"They've helped me get approved for housing and get bus passes to keep on track with doctor's appointments. I have been able to keep a positive outlook on life. This has come from having the support of LSS Gaining Ground. Having someone that genuinely cares makes a world of difference."

**Name changed to protect client confidentiality.*

Your Love IMPACTS POSITIVE CHANGE

Every incredible story in these pages happened because of YOU! Each was the result of strong partnerships with donors, congregations, corporations and volunteers who believed in the infinite worth of every person and were committed to helping them to use their God-given gifts to serve. We thank our Boards of Directors, Partners Circle companies, and churches from the ELCA and other denominations which all gave generously of time, talents, treasure and ties to make miracles happen for so many in 2022. Truly, this could not have happened without you!

M3
CATALYST CONSTRUCTION
First Business Bank
Gallagher
bakertilly
CARDINAL CAPITAL MANAGEMENT, INC.
FIRST FEDERAL BANK
GORMAN
Growing Minds
J. JEFFERS & CO.
JOHNSON BANK
TriCity National Bank
Michael Best
Michael Best Strategies
Nicolet National Bank
PNC
TOWN BANK A Wintrust Community Bank
United Community Center Centro de la Comunidad Unida
Catholic Financial Life
KITTLE PROPERTY GROUP INC
TEUTEBERG INCORPORATED
festival
SEEDS OF HOPE
Marty Schreiber

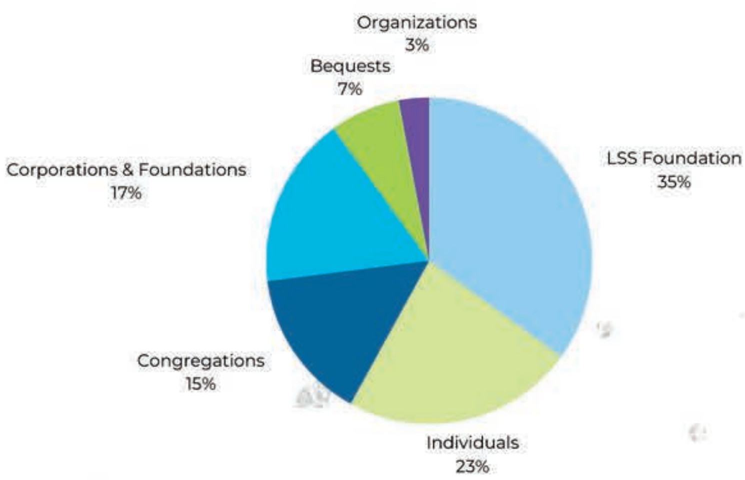
2022 FINANCIALS

Revenue	
Federal, State, Local Service	$47,057,902
Client Fees, Insurance or Contracts	8,167,182
Bequests & Contributions	2,029,442
Other Income	2,360,314
Total Revenue	**$59,614,840**

Expenses*	
Program Services	$49,833,799
Administrative & General	8,519,212
Fundraising	817,638
Total Expenses	**$59,170,649**

**NOTE: This state of financial position is prior to audit completion*

Contributions	
Individuals	$799,207
Congregations	527,958
Corporations & Foundations	610,781
Organizations	100,543
Bequests	237,237
LSS Foundation	1,251,760
Total Contributions	**$3,527,486**



Lutheran Social Services
of Wisconsin and Upper Michigan, Inc.

6737 W Washington Street, Suite 2275
West Allis, WI 53214
Phone: 414-246-2300
Fax: 414-246-2524

Your love grows healthy communities

Thank you for being a trusted partner in ministry!

774 employees

Nearly 30,000 clients served

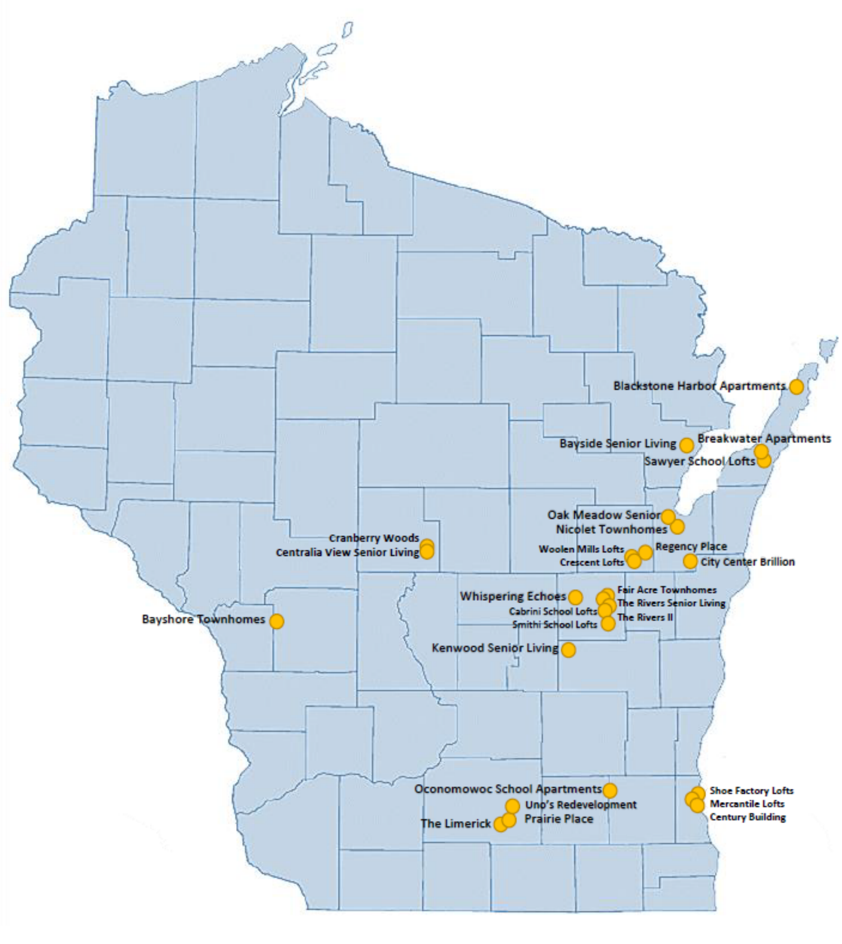
96% overall client satisfaction

230 Ohio Street, Suite 200
Oshkosh, WI 54902
Office: (920) 230-3628
Fax: (920) 230-6484

NORTHPOINTE DEVELOPMENT CORPORATION

Northpointe Development Corporation is a real estate development company created for the purpose of bringing revitalization and development to various neighborhoods in Wisconsin. Northpointe envisions vibrant communities that strengthen neighborhoods, enhance livelihoods, respond to the environment, and connect people and places. The company's mission is to provide sustainable housing for communities in a collaborative, honest, and transparent manner. Northpointe has a great reputation with the communities where we've developed housing and with WHEDA. Northpointe is one of WHEDA's largest and long-term customers and consistently scores the highest developer team score possible for a for profit developer. Northpointe and its principals have the financial capacity to successfully complete the project as well as secure market to above market equity pricing. Personal Financials of Northpoint's principals will be submitted upon request.

Northpointe, as shown below, has developed new construction family and senior apartment housing, historic rehabilitation, and commercial properties throughout Wisconsin. Most of the projects have utilized the Low-Income Housing Tax Credit program as well as other available resources including: Home, TIF, Brownfield Grants, Federal and State Historic Credits. Connecting with government entities, including the Department of Natural Resources, HUD, WHEDA, WEDC, the Federal Energy Regulatory Commission, etc is commonly required to successfully complete the development project. The company has received numerous awards including: the 2013 Top Projects Award in Milwaukee, 2015 National Historic Preservation Award, 2014 runner-up for the prestigious J. Timothy Anderson National Award for Excellence, 2017 Wisconsin Trust for Historic Preservation Award, 2019 Remarkable Milwaukee Award and the 2019 Carolyn Kellogg Historic Preservation Award.



Multifamily Developments

Project Name	Location		Units	Property Type
Rivers Senior Living	Oshkosh	WI	60	New Construction
Bayshore Townhomes	Sparta	WI	32	New Construction
Fair Acre Townhomes	Oshkosh	WI	55	New Construction
Kenwood Senior Living	Ripon	WI	24	New Construction
The Fountains of West Allis	West Allis	WI	35	Acquisition/Rehab
Blackstone Harbor Apts.	Sister Bay	WI	24	New Construction
Oconomowoc School Apts.	Oconomowoc	WI	55	Adaptive Reuse/Historic
Nicolet Townhomes	De Pere	WI	60	New Construction
Anthem Luxury Living	Oshkosh	WI	80	New Construction
Mercantile Lofts	Milwaukee	WI	36	Adaptive Reuse/Historic
Shoe Factory Lofts	Milwaukee	WI	55	Adaptive Reuse/Historic
The Rivers Phase II – Senior	Oshkosh	WI	40	New Construction
Woolen Mills Lofts	Appleton	WI	60	Adaptive Reuse/Historic
Century Building	Milwaukee	WI	44	Adaptive Reuse/Historic
Cranberry Woods	Wisconsin Rapids	WI	40	New Construction
Bayside Senior Apartments	Oconto	WI	42	New Construction
Whispering Echoes	Winneconne	WI	28	New Construction
Regency Place Senior	Little Chute	WI	40	New Construction
Centralia View	Wisconsin Rapids	WI	40	New Construction
City Center	Brillion	WI	40	New Construction
Crescent Lofts	Appleton	WI	69	Adaptive Reuse/Historic

Under Construction

The Limerick	Fitchburg	WI	125	New Construction
Cabrini School Apts.	Oshkosh	WI	33	Adaptive Reuse/Historic

2021 Awards

Sawyer School Lofts	Sturgeon Bay	WI	15
Breakwater Apts.	Sturgeon Bay	WI	53
Oak Meadow Senior	De Pere	WI	55
Uno's Madison	Madison	WI	61
Prairie Place	McFarland	WI	49
Smith School Lofts	Oshkosh	WI	31
Quentin Road Apts.	Palatine	IL	58

Total Units 1,439

NORTHPOINTE DEVELOPMENT PRINCIPALS

Cal Schultz
420 South Koeller Street
Oshkosh, WI 54902
(920) 303-9404
cal@northpointedev.com

Andy Dumke
230 Ohio Street
Oshkosh, WI 54902
(920) 230-3628
andy@northpointedev.com

Sean O'Brien
2628 Saw Tooth Drive
Fitchburg, WI 53711
(608) 334-5665
sean@northpointedev.com

Callan L. Schultz

Callan Schultz graduated from the University of Wisconsin-Oshkosh with a Bachelor of Business Administration with majors in finance and management information systems and a Masters of Business Administration. Cal is a licensed Wisconsin Real Estate Broker.

Cal formed Keystone Development, LLC in 1999. The company has developed over 2,000 apartment units throughout Wisconsin, Michigan, Ohio and Iowa. In 2011 he and Andy Dumke formed Northpointe Development Corporation for the purpose of developing and owning affordable housing in Wisconsin.

Andrew J. Dumke

Andrew Dumke began developing and managing real estate in 1993. He has grown his portfolio to include multi-family apartments, commercial office buildings, warehouse buildings, and retail centers.
His company Alliance Development has developed over $200,000,000 in real estate. Samples of nationally accredited tenants he works with are Starbucks, Panera, Fed EX/Kinkos, TJ Maxx, JoAnn Fabrics, US Cellular, Verizon, Buffalo Wild Wings, Chipotle, Qdoba, Baker Tilly, Old National Bank, and Olive Garden. Andrew's current portfolio contains over 1,000,000 square feet of commercial office, warehouse, and retail space.

In 2011, Andrew started Northpointe Development Corporation in conjunction with Cal Schultz. The purpose of this entity is to develop, own and provide market-rate, affordable, and senior housing in Wisconsin.

Sean O'Brien

Sean O'Brien joined Northpointe Development as a Partner in 2020. With over 15 years of housing and community development experience, Sean is excited to help grow Northpointe Development's state and national footprint.

Prior to joining Northpointe Development, Sean worked at the Wisconsin Housing and Economic Development Authority (WHEDA) for 14 years. The last 6 years of his tenure he was the was the Director of Commercial Lending. As Director, Sean led the development of Wisconsin's Affordable Housing Policy and allocation of the Low-Income Housing Tax Credit Program. In 2018, the Commercial Lending team implemented the State Housing Tax Credit Program which allowed WHEDA to allocate a new credit that has created or preserved approximately a thousand affordable homes annually. For three years, Sean also served on the Community Investment Advisory Council for the Federal Home Loan Bank of Chicago.

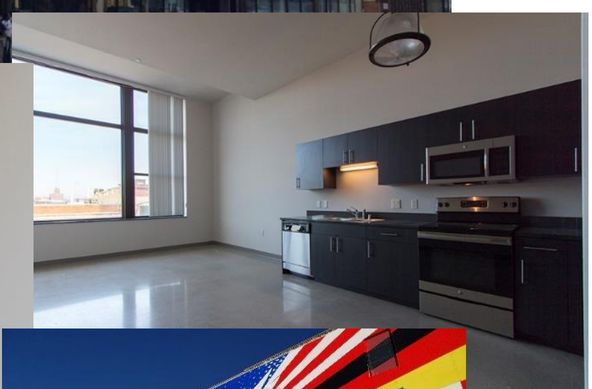
Sean holds a Bachelor of Business Administration degree from the University of Wisconsin - Madison. In 2019, Sean and his wife Emily created OB Development, LLC with the intention of providing development in consulting services for the creation and preservation of decent, safe and affordable housing.

Master Developer Experience

Marion Road Oshkosh, WI

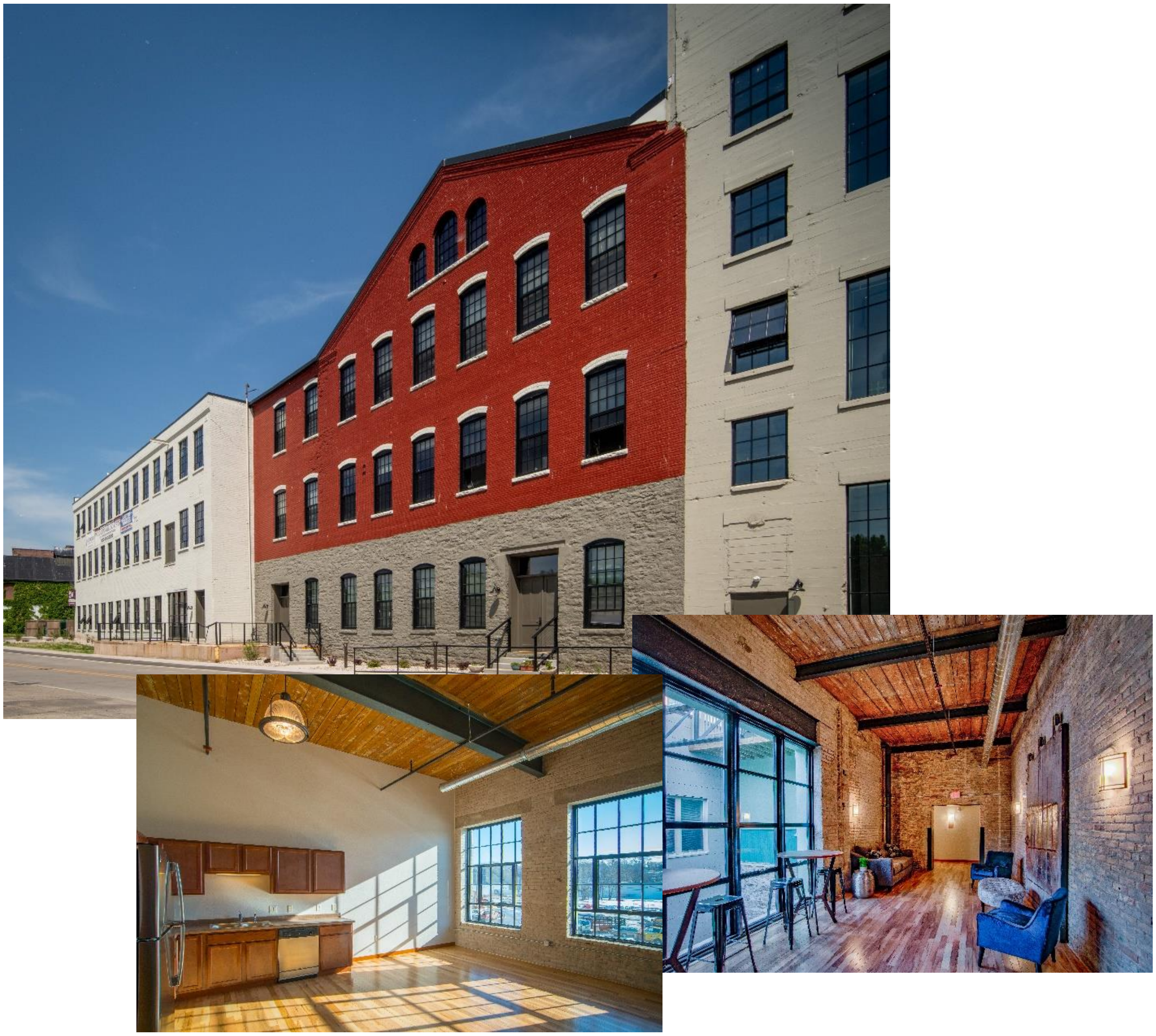
The Rivers- 60 Unit Senior Affordable
The Rivers II- 40 Unit Senior Affordable
Anthem Lofts- 80 Unit Market Rate

In 2008, the City of Oshkosh chose to work with Northpointe Development to redevelop a severely contaminated industrial manufacturing site along the Fox River. Once a home to Mercury Marine Manufacturing Plant is now has a vibrant River Walk and three housing developments. Northpointe developed all three buildings containing a total of 180 units, two of which are senior affordable properties and one market rate property. These developments have been catalytic for additional redevelopment on surrounding parcels.



MERCANTILE LOFTS
36 Units Market Rate/Office/Commercial
611 West National Avenue, Milwaukee, WI

Mercantile Lofts is a 36-unit apartment property with office and commercial on the first floor completed in 2016. The building was originally construction in 1901 as a department store and was redeveloped under the historic guidelines of the National Parks Service. The tall ceilings and polished concrete floors were preserved and incorporated in the apartments. The famous Mural of Peace was also preserved and restored. WHEDA's Milwaukee office is currently located in the building.

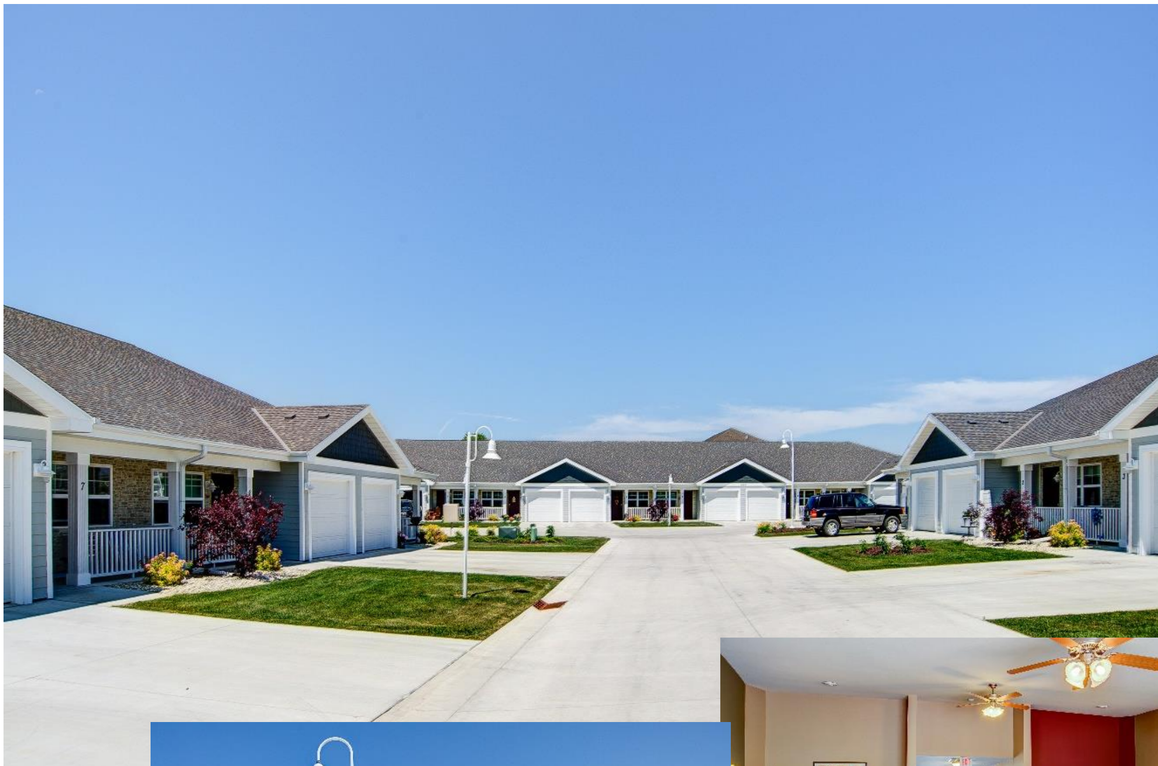


Woolen Mills Lofts
60 Units- Family Housing
218 E. South Island St., Appleton, WI

Woolen Mills Lofts is a 60-unit family LIHTC property completed in 2017. The factory building which was originally construction in phases between 1893-1962 was redeveloped under the historic guidelines of the National Parks Service into one, two, and three-bedroom units. The exposed brick walls, hardwood ceiling, steel girders, and large exterior windows were preserved and restored.

Nicolett Townhomes
60 Units- Family Housing
1380 Scheuring Road, DePere, WI

Nicolet Townhomes is a 60-unit family LIHTC property that was completed in 2014. Located within walking distance to retail, banking, and restaurants. The townhome development offers one, two, and three-bedrooms with individual enterances, attached garages, central air conditioning, washer/dryer, free wifi, and stainless steel appliances. The property has an on-site office, community room and fitness center.



Blackstone Harbor Apartments
24 Units- Family Housing
10525 Judith Blazer Drive, Sister Bay, WI

Nicolet Townhomes is a 24-unit family LIHTC property that was completed in 2013. Located in the heart of Door County the unique single-story development offers one, two and three bedrooms with individual enterances, attached garages, central air conditioning, washer/dryer, free wifi, and stainless steel appliances. The property has on-site office, community room and fitness center.

Dream Lane Real Estate Group, LLC
Lane Manning, Principal

1103 Carter Ct — *608-535-5131*
Verona, WI 53593 — *lane@dreamlanere.com*

OBJECTIVE Create and operate quality affordable housing throughout Wisconsin, Illinois, Colorado, and Iowa.

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

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

Fitchburg Planning Commission- Commissioner
2017-2020

Mission- The Planning Commission strives to respect the past, safeguard the present, and assure a vital future. Using innovative land use and planning techniques, the Fitchburg Planning Commission implements its mission statement.

Responsibilities

- Providing public assistance to various boards, commissions, and the public for development and preservation
- Assessing the future consequences of present and future land use patterns
- Reviewing all development proposals
- Updating and administering the Comprehensive Plan and associated Neighborhood Plans

- Administering the zoning, architectural, sign, land division, historic preservation, telecommunications, and extraterritorial ordinances
- Zoning, land division, and other land regulation ordinances serve to protect the present by ensuring compatible uses and efficient service costs, thus producing a vital and strong community. All the regulations work together to create a city of common interests able to accommodate diverse opportunities.
- Comprehensive Plan Review: Planning Commission looks to the future by providing a solid framework in the Comprehensive Plan allowing the community to grow in an orderly, cost-effective manner.

PLACED IN SERVICE PROJECTS

- Sawyer School Lofts, Sturgeon Bay, WI
  - 15 Workforce/Family Affordable Units, 4% Rural, 2021
- Prairie Creek Apartments and Townhomes, McFarland, WI
  - 49 Senior Affordable Units, 4% General, 2022
- UNO Terrace Apartments, Madison, WI
  - 64 Workforce/Family Affordable Units, 4% General, 2022
- Klassik Apartments and Townhomes, Verona, WI
  - 63 Workforce/Family Affordable Units, 4% General, 2022

EDUCATION

Central Michigan University
Interpersonal and Public Communications, 1994-1997

Wisconsin Realtors Association: Real Estate Pre-Broker Course Madison, WI

- Min 72 hours of course work
- Course content includes topics such as:
  - Contracts- the Law of Conveyance, validity, drafting, parties
  - approved forms- Offers to Purchase, counter offers, amendments, process, and Authorized practice of law
  - Commercial real estate, multifamily housing finance and operation, vacant land, trust accounts, historic properties, construction, business and property management
  - Escrow and closing statements
  - Financial and Office Management & consumer protection
- Applicants for a Wisconsin broker's license must have practiced as a licensed salesperson under the direct supervision of a licensed broker for at least two years within the last four years preceding application.
- Experience worth at least 40 points must be documented on the application form and verified by the supervising broker. 40 points are required in any combination listed below. Referrals do not count toward the experience requirements.
  - Completed or closed residential transaction = 5 points
  - Completed or closed commercial transaction = 10 points

Wisconsin Realtors Association: Pre- Real Estate Sales Course and CE Madison, Wisconsin

- Min 72 hours of coursework
- Course content includes topics such as:
  - Real Estate Law and Sales
  - Real Estate Broker Management
  - Marketing, Selling, and Social Media principles
  - Excel

Awards & Licenses

WI Licensed Real Estate Broker
WI Licensed Real Estate Salesperson
WI Licensed Property & Casualty provider
2020 Leukemia and Lymphoma Society Madison Man of the Year