

July 24, 2023

Casey Becker Division Administrator Dane County Department of Human Services Division of Housing Access & Affordability City-County Building 210 Martin Luther King Jr. Blvd. Madison, WI 53703

#### RE: 2023 Dane County Affordable Housing Development Fund Application Neighborhood House Community Center Redevelopment

Dear Casey,

We're pleased to enclose with this letter an application for the 2023 Dane County Affordable Housing Development Fund on behalf of Neighborhood House Community Center and The Alexander Company. Our joint proposal aims to address the pressing need for affordable housing and community development in the Greenbush Neighborhood of Madison.

The Neighborhood House Community Center, serving the Greenbush Neighborhood for over a century, has long been a pillar of support for diverse populations residing in Madison's south and west sides. As the oldest community center in the city, it has provided vital programs and services ranging from social assistance and youth programs to adult enrichment classes and community group hosting. However, the current facility has surpassed its useful life and requires redevelopment to better serve the evolving needs of the community.

In partnership with The Alexander Company, a renowned local real estate development firm with a proven track record in creating successful mixed-income communities, we envision a transformative project on the site of the current center at 29 S. Mills Street. The redevelopment will encompass a mixed-use, mixed-income community that integrates affordable housing with an upgraded community center. This holistic approach will not only provide much-needed affordable housing but also foster a vibrant and inclusive community center environment that promotes upward mobility and community engagement.

The affordable housing component of the project will cater to a diverse range of income levels, offering rates from 30% of the area median income (AMI) to market rate. This deliberate mixing of income groups is a fundamental part of our financial and operating plans. The Alexander Company's expertise in managing mixed-income communities ensures that residents can thrive in an environment that fosters economic diversity and provides opportunities for individuals and families to progress to the next phase of housing without uprooting their lives. The project has selected 40-year affordability, which will ensure an affordable housing option in the neighborhood for a long time to come.

The redesigned community center will serve as a focal point for the Greenbush Neighborhood, accommodating existing programs and social services while incorporating enhanced facilities and amenities. With upgraded spaces for a food pantry, recreation areas, classrooms, art rooms, a commercial kitchen, and a computer lab, the center will provide residents with essential resources for education, skills training, and community engagement. Additionally, the outdoor areas will facilitate youth summer camps and community events, further strengthening community bonds and fostering a sense of belonging.

Preserving the rich history of Neighborhood House and its significance within the Greenbush Neighborhood is of paramount importance. Through exhibits and design features, the redesigned community center will highlight the neighborhood's past and celebrate the cultural heritage of Madison's Italian, Jewish, and African American residents. By embracing progress while honoring the past, the project will create a lasting impact that resonates with the community for generations to come.

We firmly believe that our proposal aligns closely with the objectives and intent of the Dane County Affordable Housing Development Fund. Our collaborative effort aims to provide affordable housing options, foster community engagement, and promote economic diversity—all of which are crucial for building strong and resilient neighborhoods. By supporting this project, you will be contributing to the well-being of our community, enhancing the quality of life for residents, and creating a more equitable and inclusive society.

We kindly request your consideration and support for our application to the Dane County Affordable Housing Development Fund. We are excited about the potential to bring this transformative vision to life and make a positive and lasting impact on the Greenbush Neighborhood and greater Madison.

Should you require any additional information or have any questions, please do not hesitate to contact us. Thank you for your time and consideration.

Sincerely,

Neighborhood House Community Center, Inc.

Samuel Brown Board President



Joseph Alexander President





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**APPLICATION** 

### DANE COUNTY APPLICATION FOR 2023 AFFORDABLE HOUSING DEVELOPMENT FUND

This application should be used for project seeking Dane County AHDF funds. Applications must be submitted electronically to DCDHS Division of Housing Access by **noon on July 25, 2023**. Upload application materials to the **Dane County AHDF Dropbox**.

| AFFLICATION SUMMAR  |   |   |  |  |  |  |  |  |
|---|---|---|--|--|--|--|--|--|
| ORGANIZATION<br>NAME  | Neighborhood House Community Center, Inc. |   |  |  |  |  |  |  |
| MAILING ADDRESS<br>If P.O. Box, include<br>Street Address on<br>second line | 29 S. Mills Street, Madison, WI 53715     |   |  |  |  |  |  |  |
| TELEPHONE   | 608-255-5337                              | LEGAL STATUS  |  |  |  |  |  |  |
| FAX NUMBER  | N/A                                       | ⊠ Private, Non-Profit   |  |  |  |  |  |  |
| NAME CHIEF ADMIN/<br>CONTACT  | Laura Gundlach                            | <ul> <li>Private, For Profit</li> <li>Other: LLC, LLP, Sole Proprietor</li> </ul> |  |  |  |  |  |  |
| INTERNET WEBSITE<br>(if applicable)   | neighborhoodhousemadison.org/             | Federal EIN: <u>39-1930073</u><br>Unique Entity Identifier (UEI): UEI             |  |  |  |  |  |  |
| E-MAIL ADDRESS  | laura@neighborhoodhousemadison.org        | SAM (System for Award<br>Management): V5DDNYUP9JJ3<br>UEI DUNS: 171537400         |  |  |  |  |  |  |

#### **APPLICATION SUMMARY**

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

| PROJECT NAME                      | PROJECT<br>CONTACT PERSON | PHONE<br>NUMBER | E-MAIL                       |
|-----------------------------------|---------------------------|-----------------|------------------------------|
| The Neighborhood House Apartments | Adam Winkler              | 608-268-8129    | ajw@alexandercompan<br>y.com |

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

| TOTAL PROJECT COST | AMOUNT OF AHDF FUNDS<br>REQUESTED | PECENT OF AHDF FUNDS<br>TO TOTAL PROJECT COST |  |
|--------------------|-----------------------------------|---|--|
| \$27,492,000       | \$1,360,000                       | 4.95%   |  |

Signature of Chief Elected Official/Organization Head

Samuel Brown Printed Name

| Board President |  |
|-----------------|--|
| Title           |  |

7/24/2023 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:     | The Neighborhood House Apartments |
|-------------------|-----------------------------------|
| Project Address:  | 29 S. Mills Street                |
| City, State, Zip: | Madison, WI 53715                 |
| Parcel Number:    | 070923303021                      |
| Census Tract:     | 12.00                             |

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

The project is located in the City of Madison. The meetings to-date are as follows:

The project team had a City staff meeting on June 5th with Kevin Firchow and Chris Wells of the Planning Department and Jacob Moskowitz of the Zoning Department. This was an initial meeting to discuss the project with staff. At this meeting, the zoning was a majority of the focus. The existing zoning regulations are not compatible with the proposed project. Rezoning and timing was discussed. Selection of the rear-yard was also discussed in conjunciton with setbacks.

The project team met with Alder Tag Evers on July 5th, the alderperson for District 13 who is very supportive of the project. Alder Evers suggested the project team get in front of the Greenbush Neighborhood Assocation as soon as possible for an initial presentation. He also offered support for the height of the building, which will need to approved as a conditional use.

The project team met with the Greenbush Neighborhood Association's board on July 10th. Although there were a lot of questions from the members, there were no notable concerns and overall the group supports the project.

The project team met with Christie Baumel- City of Madison Deputy Mayor on July 18th. The purpose of the meeting was to make the mayor's office informed on the project.

The project team met with Matt Wachter and Matt Mikolajewski on July 24th to discuss TIF funding.

C. **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.

The project team will be submitting an application for the City of Madison's Affordable Housing Funds in August 2023.

The project will request TIF funds from the City of Madison. The project is located in the TID that was created in July 2021.

Additionally, the project's affordable units will qualify for an exemption from the payment of City of Madison Park Impact Fees.

Is the project eligible for municipal affordable housing resources? If not please indicate why the project is not eligible.

Yes, the project is eligible for the City of Madison Affordable Housing Funds

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.

The property is currently zoned Campus Institutional ("CI"). CI zoning does not support envisioned changes and goals of the proposed project, so the property will need to be rezoned. After discussion with the Planning and Zoning staff at the initial meeting on June 5th, the zoning the project team and city staff thought most suitable is Neighborhood Mixed-Use ("NMX"). The maximum height in NMX is 3 stories, but the project can go higher through a conditional use. The project will also need to go before Landmarks for a demolition permit.

The City of Madison's 2018 Comprehensive Plan's Generalized Future Land Use Map did not have a land use recommendation listed. The city is currently working on the 5-year interim update. The project team will fill out a Generalized Future Land Use Map Amendment Application and submit it to the City by the August 6, 2023 deadline with a recommendation for Neighborhood Mixed-Use (NMX). This is required in order to rezone the property.

In the Spring 2010 Supplement to the Greenbush and Vilas Neighborhood Plans "A Revitalization Strategy, the first goal is to "Increase the affordability and desirability of the neighborhood for University and hospital employees, graduate students, and young families". This project will help the neighborhood be one step closer to achieving this goal.

E. **PROJECT DESCRIPTION**: Provide a detailed description of the project, including proposed affordability period.

Neighborhood House Community Center – Madison's first and oldest community center, has been serving the Greenbush Neighborhood for more than 106 years. Founded in the traditions of the late 19th century settlement house movement, Neighborhood House was originally constructed to serve Madison's rapidly growing Italian, Jewish, and African American communities. Today, Neighborhood House remains committed to providing a diverse range of programs and services to the populations residing in Madison's south and west sides. However, the current community center building has surpassed its useful life, and is looking to secure its future and better serve its users and community by redevelopment the property to provide increased space for a wider variety of center programming and complimentary uses.

The Neighborhood House Board of Directors and its members envisions a new Neighborhood House worthy of being considered downtown Madison's community center – a gathering place where traditional community center services share a home with enriching cultural and arts programming as well as other amenities for neighborhood residents.

Available social services include a food pantry, community meals, housing assistance, a computer lab, holiday drives, and a monthly law clinic. Additionally, they provide year-round youth programs, adult enrichment and fitness classes, programs specifically tailored for adults with disabilities, and act as hosts for numerous community groups.

Neighborhood House community Center sought creative solutions for an updated space to meet their growing needs, and in a competitive, public proposal process they selected local real estate development firm The alexander Company to bring their vision to fruition. Through this partnership, Neighborhood House and The Alexander Company will create a new mixed-use, mixed-income community on the site of the current center at 29 S. Mills Street.

The community center will be located on the ground floor, with housing above catering to a variety of income levels. The development will offer much-needed housing at affordable rates ranging from 30% of the area median income (AMI) to market rate. The unit mix is 37 1-Bedroom Units, 20 2-Bedroom Units and 3 3-Bedroom Units. All three 3-Bedroom Units have direct 1st Floor exterior ingress/egress.

The Alexander Company typically makes a deliberate effort to mix income groups as a fundamental part of a community's financial and operating plans and has achieved great success in doing so. With elevated design standards, effective management, preventative maintenance, and an experienced in-house compliance team, the company has created mixed-income communities that serve as shining examples of success while also setting a precedent for the appropriate and responsible methods of multi-family development and management. A mixed-income community offers individuals and families a platform to achieve and sustain upward mobility. With various levels of income served, residents are able to move into the "next phase" of housing without uprooting their lives and incurring the expenses associated with moving. Residents benefit from affordable housing in an urban core – an area and lifestyle that they might not otherwise be able to afford and enjoy. With greater access to transportation and employment opportunities individuals and families thrive.

To cater to the specific needs of individuals with income in the 30% AMI range, the project team has partnered with the Salvation Army Dane County to provide additional services that Neighborhood House currently does not offer. In addition to keeping the project affordable during the 15-year Section 42 tax credit compliance period, the project has selected to make the project for 40-years.

The redesigned community center will accommodate existing programs and social services, and also feature an upgraded food pantry, recreation areas, classrooms, art rooms, a commercial kitchen for community meals, and a new computer lab for academic support and job skills training. It will also include outdoor spaces for youth summer camps and community events. Furthermore, the center will offer inviting reception areas, event and meeting rooms to accommodate a diverse array of cultural, art, dance, and immigrant groups that have called Neighborhood House their home for over a century.

Preserving its rich history while meeting the evolving needs of the community remains paramount for Neighborhood House. As one of the few remaining institutions from Madison's lost Greenbush Neighborhood, Neighborhood House aims to showcase the neighborhood's past and celebrate the important role that Neighborhood House has played in the lives of Madison's Italian, Jewish, and African American residents through exhibits and design features.

F. **TARGETED POPULATIONS**: Will the project serve any of the listed targeted populations?

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

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

|           | 2020 Enterprise Green Communities Certification                 |
|-----------|---|
| $\square$ | ENERGY STAR Multifamily New Construction and EPA Indoor airPLUS |
|           | 2020 Enterprise Green Communities Certification Plus            |
|           | Passive House (PHIUS)   |

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

| ON OR BEFORE           | MILESTONES                                 |
|------------------------|--|
| May 22, 2023           | Site Control (Memorandum of Understanding) |
| December 2023          | Rezoning/Conditional Use Complete          |
| January 26, 2024       | WHEDA Application Submitted                |
| Approximately May 2024 | Project Awarded WHEDA Credits              |
| June 2024              | Bid Packages Released                      |
| July 2024              | Bids from Subcontractors Received          |
| August/September 2024  | Close Purchase/Financing                   |
| September 2024         | Demolition/Construction Start              |
| August 2025            | Commence Lease-up                          |
| December 2025          | Certificate of Occupancy                   |
| March 2026             | Complete Lease-up/ Stabilized Operations   |

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

| ADDRESS #1: | 29 South M    | ills Street | , Madison |  |   |  |  |  |  |  |
|-------------|---------------|-------------|-----------|--|---|--|--|--|--|--|
|             | # of Bedrooms |             |           |  | Projected Monthly Unit, including Utilities |  |  |  |  |  |
| % of County |               |             |           |  |   |  |  |  |  |  |

| Median<br>Income<br>(CMI) | Total<br># of<br>Units | # of<br>Studios | # of 1<br>BRs | # of 2<br>BRs | # of 3<br>BRs | # of<br>4+<br>BRs | \$ Rent<br>for<br>Studios | \$ Rent<br>for 1<br>BRs | \$ Rent<br>for 2<br>BRs | \$ Rent<br>for 3<br>BRs | \$ Rent<br>for 4+<br>BRs |
|---------------------------|------------------------|-----------------|---------------|---------------|---------------|-------------------|---------------------------|-------------------------|-------------------------|-------------------------|--------------------------|
| ≤30%                      | 12                     |                 | 7             | 4             | 1             |                   |                           | \$580                   | \$695                   | \$805                   |                          |
| 40%                       |                        |                 |               |               |               |                   |                           |                         |                         |                         |                          |
| 50%                       | 25                     |                 | 15            | 9             | 1             |                   |                           | \$1,035                 | \$1,245                 | \$1,440                 |                          |
| 60%                       | 14                     |                 | 8             | 5             | 1             |                   |                           | \$1,265                 | \$1,520                 | \$1,755                 |                          |
| 80%                       |                        |                 |               |               |               |                   |                           |                         |                         |                         |                          |
| Affordable<br>Sub total   | 51                     |                 |               |               |               |                   |                           |                         |                         |                         |                          |
| Market                    | 9                      |                 | 7             | 2             |               |                   |                           | \$1,650                 | \$1,975                 |                         |                          |
| Total Units               | 60                     |                 | 37            | 20            | 3             |                   | Notes:                    |                         | •                       | •                       |                          |

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

| otal # of<br>of Studios<br>hits | # of 1 | drooms<br># of 2<br>BRs | # of 3<br>BRs | # of<br>4+<br>BRs | Project<br>\$ Rent<br>for<br>Studios   | sted Mont<br>Rent<br>for 1<br>BRs   | hly Unit, in<br>\$ Rent<br>for 2<br>BRs | ncluding L<br>\$ Rent<br>for 3<br>BRs | Jtilities<br>\$ Rent<br>for 4+<br>BRs   |
|---------------------------------|--------|-------------------------|---------------|-------------------|--|---|---|---------------------------------------|---|
| of Studios                      |        | -                       |               | 4+                | for  | for 1   | for 2                                   | for 3                                 | for 4+  |
|                                 |        |                         |               |                   |  |   | 1                                       |                                       | 5.13  |
|                                 |        |                         |               |                   |  |   |   |                                       |   |
|                                 |        |                         |               |                   |  |   |   |                                       |   |
|                                 |        |                         |               |                   | Notes:   |   |   |                                       |   |
|                                 |        |                         |               |                   | Image: Constraint of the sector of | Image: Constraint of the second sec |   |                                       | Image: Sector of the sector |

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

#### J. SITE AMENITIES: Check all that apply.

|             | Community Building, square feet:                        |  |  |  |  |  |  |
|-------------|---|--|--|--|--|--|--|
| $\square$   | Community Room, square feet: Approximately 700 sf       |  |  |  |  |  |  |
|             | Garages, number: and monthly rent:                      |  |  |  |  |  |  |
|             | Surface parking, number: and monthly rent:              |  |  |  |  |  |  |
| $\boxtimes$ | Underground parking, number 40 and monthly rent: \$0.00 |  |  |  |  |  |  |

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

In addition to the community room and underground parking in the apartment portion of the building, the apartments will also have a fitness center and roof top deck.

The Community Center will have amenities and services available to the tenants as well. Included are a basketball court and access to the services and programs. See attached for a list of the Neighborhood House's Programs and Services.

## LOCATION

L. **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 project is located in the Greenbush neighborhood, which is a vibrant and historic neighborhood known for its diverse population and rich cultural heritage. Here's a description of the neighborhood and its access to various facilities and services:

1. Social Facilities and Services: The Greenbush neighborhood offers a range of social facilities and services. The subject property is home to Neighborhood House, an important neighborhood and city resource where residents can participate in recreational activities, attend events, and access social services. Programs and services include in-person food pantry, youth & teen summer camps, after-school programs, mentoring, meeting spaces for community groups & organizations, wellness and enrichment classes for adults, social programming for adults with disabilities, technology lab, transportation assistance, community meals, neighborhood events, and much more.

2. Recreational Facilities and Services: Greenbush residents have access to numerous recreational facilities. Vilas Park, located on the neighborhood's eastern edge, offers a variety of year round recreational activities, including a beach, playgrounds, sports fields, winter ice skating with a seasonal warming shelter and skate rental, and a zoo. Wingra Park, situated nearby, features kayaking and paddleboarding, walking trails, and picnic areas.

3. Educational Facilities and Services: The Greenbush neighborhood benefits from its proximity to the University of Wisconsin-Madison, a renowned educational institution. Residents have easy access to the university's libraries, museums, art galleries, and cultural events. Additionally, Greenbush is served by local public schools.

4. Commercial Facilities and Services: Greenbush features a mix of commercial establishments, providing convenience for its residents. Monroe, Park and Regent Street, all major thoroughfares running the periphery of the neighborhood, are lined with various shops, restaurants, cafes, and boutiques. Residents can find grocery stores, pharmacies, and other essential services within close proximity.

5. Health Facilities and Services: The neighborhood has access to health facilities and services. Meriter Hospital, the seventh largest hospital in the state based on bed size in 2021, is one block from the project. In addition, there are various clinics, dental offices, and pharmacies located within or near the neighborhood, ensuring residents have convenient healthcare options.

6. Municipal Facilities and Services: Greenbush benefits from the municipal facilities and services provided by the City of Madison. The neighborhood has access to public transportation, including bus routes operated by Madison Metro Transit, making it easy to commute to other parts of the city.

| Type of Amenities & Services | Name of Facility          | Distance from<br>Site |
|------------------------------|---------------------------|-----------------------|
| Full Service Grocery Store   | Asian Midway Foods        | .24 miles             |
|                              | Trader Joe's              | .69 miles             |
| Public Elementary School     | Randall Elementary School | .67 miles             |
| Public Middle School         | Wright Middle School      | 1.25 miles            |
|                              | Hamilton Middle School    | 2.81 miles            |
| Public High School           | West High School          | 1.13 miles            |

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

| Job-Training Facility, Community    | Cents Services, Inc                 | .08 miles  |
|-------------------------------------|-------------------------------------|------------|
| College, or Continuing Education    | UW-Madison Continuing Studies       | .2 miles   |
| Programs                            | Edgewood College                    | 1.07 miles |
| Childcare                           | UnityPoint Health- Meriter-         | .12 miles  |
|                                     | Children's Center                   |            |
|                                     | Cultured Kids of Madison            | .35 miles  |
| Public Library                      | Madison Public Library- Monroe      | .57 miles  |
|                                     | Street                              |            |
| Neighborhood, Community, or         | Neighborhood House                  | 0 feet     |
| Senior Center                       |                                     |            |
| Full Service Medical Clinic or      | UnityPoint Health- Meriter Hospital | .07 miles  |
| Hospital                            | St. Mary's Hospital                 | .49 miles  |
| Pharmacy                            | Community, a Walgreens Pharmacy     | .3 miles   |
|                                     | UW Health Medical Center            | .2 miles   |
|                                     | Pharmacy                            |            |
| Public Park or Hiking/Biking Trails | Edward Klief Park                   | .09 miles  |
|                                     | Southwest Commuter Path             | .2 miles   |
| Banking                             | Summit Credit Union                 | .39 miles  |
| Retail                              | Leopold's Books Bar Caffe           | .19 miles  |
| Other (list the amenities)          | Henry Vilas Zoo                     | .53 miles  |

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

The project enjoys a highly advantageous location in terms of public transportation, being centrally situated within the City of Madison's Preferred Transit Oriented Development Areas. Multiple bus stops are within close proximity, with the nearest ones, Regent & S Mills (EB) and Regent & N. Mills (WB), just 0.08 miles away from the project site. These stops are part of the E Route, which operates on weekdays at 30-minute intervals and on weekends at one-hour intervals, providing convenient and frequent access to public transit. Furthermore, the project is conveniently located near the Southwest Commuter Path, making it easily accessible to cyclists. For those without bicycles, the Madison BCycle service offers a nearby station at Park and Spring St, just 0.22 miles away. To enhance accessibility, the Madison Public Library Foundation collaborates with Madison BCycle to offer the Community Pass Program, making BCycle more affordable and accessible. Community Passes are available for check-out at all nine Madison Public Library locations for up to a week, while individuals can purchase an annual pass for \$150.00, granting them unlimited 90-minute rides for a full season. Monthly and Single Ride Passes are also offered. The project site's central location also provides easy access to a wide range of job opportunities, which is particularly beneficial for lower-income workers. The nearby major employer, Meriter, is located just steps away from the project, offering a pool of individuals who may qualify for affordable housing. The Capitol Square offers a pool of potential renters, with many individuals working in various sectors such as retail, food service, custodial services, and administrative roles. Convenient public transportation options, as mentioned earlier, allow people to reach the square with ease. A bus ride to the Capitol takes approximately 10 minutes, with a walk to the W Johnson & N Mills (EB) bus stop and a five-minute bus ride to Main & S Carroll (EB), costing \$2.00 per trip. Alternatively, a 31-day bus pass can be purchased for \$65.00, and eligible low-income adults can obtain a discounted rate of \$28.00 for the 31-day pass. For those who prefer biking, a ride through Madison BCycle to the Capitol Square takes approximately 7 minutes on foot to the N Park/Spring Street Station and a 9-minute bicycle ride to the Square. BCycle offers various pass options, including an annual pass for \$150.00,

a single ride pass for \$7 per 30 minutes, and a monthly pass. Moreover, for those who may need a car occasionally, Zipcar offers a convenient option. The Regent/Park Zipcar station is just a 7-minute walk away from the project, and a 5-minute drive leads to the Capitol Square. Rental pricing is as listed above.

## **PROJECT APPROACH**

N. **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.

The site redevelopment project is a collaboration between The Alexander Company and Neighborhood House, working together as co-developers. In the partnership, Neighborhood House will qualify as an Emerging Developer on the WHEDA tax credit application. Both organizations will also be owners in the managing member entity, with Neighborhood House holding a 51% ownership stake and The Alexander Company holding 49%.

Neighborhood House will be given a right of first refusal at the end of the 15-year compliance period for the Low-Income Housing Tax Credits to acquire the Project or membershipd interests of the third-party investor member at a price specified in Code Section 42(i)(7). Additionally, Neighborhood House will have the opportunity to purchase the Alexander Company's interest in managing member for a nominal \$100.

The Neighborhood House will rent space within the project at a below-market rate, covering only their proportionate share of CAM (Common Area Maintenance) and taxes for the property. This will enable the Neighborhood House to continue offering their vital community service without the financial burden of paying market rent.

O. PARTNERHING 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 preferences for households experiencing homelessness. . If project will not implement an HSC preference on any project units, indicate how the proposed project will forward the goal of ending homelessness without the HSC preference.

The Salvation Army, the service provider for the project, is a Homeles Services Consortium member agency. All twelve of the project's 30% AMI units will be Targeted to Individuals/Familes on the HSC community by-name list.

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

|    |    | list |
|----|----|------|
| 60 | 12 | 20%  |

Describe the process and anticipated timeline for outreach, application submittal, and tenant screening for HSC-set aside units. Also, indicate support that will be made available to for potential applicants during the application process (e.g. transportation to application site, assistance gathering required documents).

120 days prior to opening or a unit becoming available, the property management team will notify the Salvation Army of the unit becoming available. The applications are reviewed for program eligibility within seven days of receipt. The application includes a list of documents needed to determine project eligibility and contact information for assistance in obtaining those documents.

Applicants can apply online or in-person with the assistance of a case manager or compliance manager at a location convenient for the applicant. If needed, the property will pay for bus fare or cab.

P. ACCESS TO UNITS FOR HOUSEHOLDS EXPERIENCING HOMELESSNESS: Will the project incorporate ALL of the listed flexible tenant screening criteria detailed below for applicants referred to units that are being targeted for individuals/families experiencing homelessness?

| Yes | No          |
|-----|-------------|
|     | $\boxtimes$ |

| r |  |
|---|--|
| • | Inability to meet a minimum income requirement if the applicant can<br>demonstrate the ability to comply with the rent obligation based on a rental<br>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<br>and non-discrimination ordinances in the municipality where the project is<br>located.   |
| • | 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.  |
| • | Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water).   |
| • | 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.   |
| • | Wisconsin Circuit Court Access records;  |
| • | 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.)

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

|                         |             | 0001111 | grifeeee minnet deng appliedine baeed en the felleming.  |
|-------------------------|-------------|---------|--|
|                         | Yes         | No      |  |
|                         | $\boxtimes$ |         | Inability to meet a minimum income requirement if the applicant can demonstrate  |
| Required<br>for funding |             |         | the ability to comply with the rent obligation based on a rental history of paying at an   |
| int                     | N7          |         | equivalent rent to income ratio for 24 months  |
| r fu                    |             |         | Lack of housing history  |
| цбл                     |             |         | Membership in a class protected by Dane County fair housing ordinances and non-<br>discrimination ordinances in the municipality where the project is located.   |
|                         | $\boxtimes$ |         | Credit score   |
|                         | $\square$   |         | Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations.  |
|                         | $\square$   |         | Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water).   |
|                         |             |         | 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.   |
|                         | $\boxtimes$ |         | Wisconsin Circuit Court Access records;  |
|                         |             |         | Criminal activity, except: (i) a criminal conviction within the last two years for violent criminal activity or drug related criminal activity resulting in a criminal conviction, and (ii) if the program or project is federally assisted, criminal activity for which federal law currently requires denial. ( <i>Violent criminal activity</i> is defined in 24 C.F.R § 5.100 and means any criminal activity that has as one of its elements the use, attempted use, or threatened use of physical force substantial enough to cause, or be reasonably likely to cause, serious bodily injury or property damage. "Drug related criminal activity" 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 or other caregiver.) |

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

Will the project incorporate the denial process detailed below?

| Yes         | No |
|-------------|----|
| $\boxtimes$ |    |

|    | Prior to a denial based on a criminal record, the housing provider shall<br>provide the applicant access to a copy of the criminal record at least five<br>days prior to the in-person appeal meeting and an opportunity to dispute<br>the accuracy and relevance of the report, which is already required of<br>HUD assisted housing providers. See 24 C.F.R. § 982.553(d), which<br>applies to public housing agencies administering the section 8 rent<br>assistance program.  |
|----|---|
| 1. | Prior to a denial based on a criminal record, the housing provider shall provide the applicant the opportunity to exclude the culpable family member as a condition of admission of the remaining family members.   |
| 2. | Prior to a denial decision, the housing provider is encouraged to meet with<br>the applicant to review their application and make an individualized<br>determination of their eligibility, considering: (a) factors identified in the<br>provider's own screening policies, (b) if applicable, federal regulations,<br>and (c) whether the applicant has a disability that relates to concerns with<br>their eligibility and an exception to the admissions rules, policies,<br>practices, and services is necessary as a reasonable accommodation of<br>the applicant's disability. In making a denial decision, the housing<br>provider shall consider all relevant circumstances such as the seriousness<br>of the case, the extent of participation or culpability of individual family<br>members, mitigating circumstances related to the disability of a family<br>member, and the effects of denial on other family members who were not<br>involved in the action or failure.  |
| 3. | The property manager will base any denial on sufficient evidence. An arrest record or police incident report is not sufficient evidence. Uncorroborated hearsay is not sufficient evidence.   |
| 4. | <ul> <li>Denial notices shall include the following: <ul> <li>a) The reason for denial with details sufficient for the applicant to prepare</li> <li>a defense, including:</li> <li>i) The action or inaction forming the basis for the denial,</li> <li>ii) Who participated in the action or inaction,</li> <li>iii) When the action or inaction was committed, and</li> <li>iv) The source(s) of information relied upon for the action or inaction.</li> <li>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.</li> <li>c) Notice of the applicant's right to copies of the property manager's screening criteria.</li> <li>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.</li> <li>e) Notice of the right to be represented by an attorney or other representative.</li> <li>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.</li> </ul> </li> </ul> |
| 5. | If the applicant requests an in-person appeal meeting, the hearing will be conducted by a person who was not involved in or consulted in making the   |
|    | decision to deny the application nor a subordinate of such a person so involved.  |
| 6. | The in-person appeal meeting shall be scheduled within ten working days of the request, unless the applicant requests a later date.   |
| 7. | A written decision on the application shall be provided to the applicant  |

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

| Yes         | No |
|-------------|----|
| $\boxtimes$ |    |

| a. | Security Deposits. The amount of a security deposit shall not be more than one month's rent.   |  |  |  |
|----|--|--|--|--|
| b. | <b>Late Fees and Other Fees.</b> Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent. Other penalty fees are prohibited. All other fees must be directly related to the cost for a specific amenity or service provided to the tenant and comply with all applicable laws.  |  |  |  |
| C. | <b>Rights of Youth to Access Common Spaces.</b> Youth under the age of 18 are allow to use and enjoy common areas without supervision. This does not preclude reasonable rules in ensure the safety of children and youth.   |  |  |  |
| d. | <b>Good Cause for Termination.</b> A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined in include the following: (i) a serious violation of the lease; (ii) repeated minor violations of the lease; or (iii) a refusal to re-certify program eligibility. Repeated means a pattern of minor violations, not isolated incidents. Termination notices and procedures shall comply with Chapter 704 of Wisconsin Statutes and federal law, when applicable. Written notice is required for non-renewal and shall include the specific grounds for non-renewal and the right of the tenant to request a meeting to discuss the non-renewal with the landlord or landlord's property management agent within fourteen (14) days of the notice. If requested, the landlord or property management agent will meet with the tenant to discuss the non-renewal, allow the tenant to respond to the alleged grounds for non-renewal, and pursue a mutually acceptable resolution. |  |  |  |
| е. | <b>Reasonable Guest Rules.</b> Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not 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:   |  |  |  |
|    | <ul> <li>(1) A notice of the ban is issued to the tenant stating the: <ul> <li>(a) name of the person banned,</li> <li>(b) grounds for the ban including, (i) the specific facts detailing the activity resulting in the ban; (ii) the source of the information relied upon in making the ban decision; and (iii) a copy of any criminal record reviewed when making the ban decision; and</li> <li>(c) the right of the tenant to have a meeting to dispute the proposed ban, discuss alternatives to the ban, and address any unintended consequences of the proposed ban.</li> </ul> </li> <li>(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 proposed ban.</li> </ul>   |  |  |  |
|    | 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.<br>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 sta and federal law.                                    |  |
|----|--|--|
|    | Nothing in this policy limits a person's right to pursue a civil order for protection against another individual.  |  |
| f. | <b>Parking Policies.</b> Parking policies and practices must comply with applicable laws. Vehicles shall not be towed to a location that is more than 6 miles from the rental premises, unless there is not a towing company with a tow location available within 6 miles. |  |

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

| Name of Supportive Services Partner, and number of staff dedicated to project:   | The Neighborhood House Apartments will include 12 (20%) Integrated<br>Supportive Housing units at the 30% AMI income and rent level.<br>The Salvation Army of Dane County currently has a total of 6 supportive staff<br>members. The staff are non-exclusive to any property that they provide support<br>services to. The Salvation Army will provide supportive case management<br>services under the DAWNS and RISE programs   |
|--|--|
| Scope of Services provided to tenants and approaches supportive service partner will use to address needs of tenant population:  | The Salvation Army has the ability to offer individuals and families a rapid<br>rehousing package through DAWNS and RISE programs. Rapid rehousing<br>packages consist of weekly case management sessions, security deposit, and<br>first month's rental assistance for the DAWNS program and up to a year's<br>rental assistance in the RISE program. Additional rental assistance may be<br>provided on a case-by-case basis. Case management support can last up to<br>two years.   |
| Where tenants will access services. For examples will services be<br>on-site at development in designated space or by referral to off-site<br>community supports:  | The Salvation Army provides supportive services directly in the tenant's residents and at their office located at 630 East Washington Avenue. The Neighborhood House will also offer the Salvation Army office space within the community center as needed.  |
| If services provided are referral to off-site community supports,<br>please detail how tenants will receive information on supportive<br>services that are available to them before and after needs arise: | Tenants will receive information about all of the Salvation Army's programs<br>and how to access those services through fliers in the on-site property<br>management office, social media or other tenant outreach methods.  |
| The frequency of services provided and/or a proposed schedule of when services are available to tenants:   | Generally services are Monday-Friday 8:30 am to 5:30 pm. Case managers typically meet with residents once a week.  |
| How will the supportive services partner identify and collaborate with<br>other community service providers in the target area:  | The Salvation partners very closely with the other service providers for families in our community, such as The Road Home, The YWCA, Porchlight and Coordinated Entry. DAWNS is not a direct duplication of service but actually a compliment. All of the housing programs available for families vary slightly as to amount of financial assistance, length of time, type of service. In the past if a participant is unable to access one program or has not been successful in one they can participate in another. Or if the needs of a family would best fit in one of the housing programs, for example DAWNS, as determined by coordinated entry, then the family would be able to enroll in the program. |
|  | The goal of the DAWNS program is to assist the families to obtain and maintain   |

|  | permanent housing. The program is able to assist in obtaining the housing due to the partnerships with landlords and the financial assistance. The other part is for the families to be able to maintain the housing. The case manager assists the participant to enroll in many of the community mainstream benefits such as Childcare, FSET, Food Share, W2, Employment and Training programs, Section 8 and Social Security if eligible.  |
|--|--|
| How the supportive services partnership will be funded, including if<br>the respondent is providing funding to support the partnership:  | The Salvation Army will provide services at no cost to the project. A majority<br>of the Salvation Army's supportive services are funded through Dane County,<br>the United Way, and other government donations and fundraising. The<br>DAWNS program is funded by Dane County and the RISE program is funded<br>through the US Department of Housing and Urban Development.   |
| Relevant performance data that provides insight into the supportive<br>service partner's experience serving the target tenant population, and<br>the outcomes for their tenants. Metrics could include the number of<br>individuals served in a related program in a year, housing retention<br>rates for individuals served in that program, connections to<br>employment, etc: | The Salvation Army of Dane County DAWNS program:<br>-In 2022, the DAWNS program served 72 households (consisting of 85 adults<br>and 110 children) with 85% of the families successfully housed at the end of<br>the year.<br>-In 2021, the DAWNS program served 75 households (consisting of 98 adults<br>and 131 children) with 85% of the families successfully housed at the end of<br>the year. The average cost of rental assistance per household was \$3,373.45.<br>-Since its inception in 2016, the DAWNS program has served 817 people (382<br>adults and 435 children) and 290 households with an 90% success rate into<br>permanent housing<br>The Salvation Army of Dane County RISE program:<br>-In 2022, the RISE program served 39 households (consisting of 51 adults and<br>80 children) with 93% of the families successfully housed at the end of the<br>year. The average cost of rental assistance per family was \$5,240.92.<br>-In 2021, the RISE program served 48 households (consisting of 67 adults and<br>108 children) with 94% of the families successfully housed at the end of the<br>year. The average cost of rental assistance per household was \$3,792.73.<br>-Since its inception in 2014, the RISE program has served 565 people (220<br>and 345 children) and 157 households with an 91% success rate into<br>permanent housing. |
| How the supportive services partner and the respondent will work<br>together to ensure the best outcomes for tenants, such as housing<br>retention:  | The Salvation Army and the Alexander company will work collaboratively to try<br>to ensure housing retention. We will have constant communication if there are<br>issues with tenants that could jeopardize the housing stability. The Salvation<br>Army staff will be on site often as well as the Alexander Company's property<br>management making accessibility and communication simple   |

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

The Salvation Army DAWNS program's inception began in September of 2016. This program was created in collaboration with Dane County Human Services has been funded through this rapid rehousing RFP funds ever since. Besides the DAWNS program The Salvation Army has been operating another rapid rehousing program called RISE since 2014. RISE consistently operates with a 93% success rate annually. In addition to that, The Salvation Army has also been in collaboration with The YWCA, The Road Home and United Way with the Predoline Rapid Re-housing program for over a decade. This is one of the first Rapid Rehousing programs to operate in Dane County.

## EXPERIENCE AND QUALIFICATIONS

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

The Neighborhood House will be a co-developer for the project. The limited development experience of the Neighborhood House will qualify it as an Emerging Developer with WHEDA. The Alexander Company, the other co-developer, is a second-generation real estate firm with nearly 40 years' experience, nationally recognized for achievements in urban infill development, historic preservation, and affordable housing solutions. Based in Madison, Wisconsin, the award-winning full-service real estate development firm specializes in public-private partnerships, often leveraging state and federal resources to give new life to historically significant buildings and downtown neighborhoods, creating unique affordable housing solutions for communities in need. Please see attached for more information.

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

Drawing on nearly 40 years of property management experience, with working knowledge through the management of over 7,000 units, The Alexander Company applies best practices to provide comprehensive service. In both residential, commercial, and mixed-use properties, The Alexander Company's property management expertise lies in marketing and leasing, affordable housing compliance, market-rate property management, asset management, and preventative maintenance. Every action taken is approached from the perspective of an owner, using time-tested property management strategies with proven results. Please see attached for more information.

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

N/A

## PROJECT FINANCING

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

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

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

| SOURCE | AMOUNT | USES | AMOUNT |
|--------|--------|------|--------|
|--------|--------|------|--------|

| 2,750,000  |
|------------|
| 5,022,479  |
| 8,636,480  |
| 4,512,724  |
| 1,000,000  |
| 1,360,000  |
| 502,248    |
| 1,700,000  |
| 907,236    |
| 1,100,000  |
| 27,491,166 |
|            |

| LAND                   | 2,750,000  |
|------------------------|------------|
| CONSTRUCTION           | 18,430,350 |
| CONTINGENCY            | 921,518    |
| ARCHITECT/ENGINEER     | 878,834    |
| SOFT COSTS             | 495,519    |
| CONSTRUCTION INTEREST  | 522,792    |
| LOAN ORIGINATION FEES  | 202,153    |
| PERSONAL PROPERTY/FF&E | 255,000    |
| DEVELOPER FEE          | 2,750,000  |
| RESERVE/LEASE-UP       | 285,000    |
| TOTAL                  | 27,491,166 |

#### X. Which of the identified sources have been secured?

This is the first application that is being submitted for this project. None of the other sources, other than the Land Equity, have been secured at this time.

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

The project will apply to WHEDA for 4% credits and a state tax credit allocation. The WHEDA applications are due in January 2024.

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

In today's real estate market, two significant challenges affecting all development projects are the escalation of construction costs and the rise in interest rates. Unfortunately, our project is not immune to these prevailing market conditions.

One particular issue specific to our project that contributes to higher construction expenses is the inclusion of a first-floor community center. The design of the Neighborhood House necessitates the use of a precast podium, which adds complexity and cost to the construction process. The podium's height is 6 feet taller than a typical first floor, requiring additional envelope materials and resources.

Moreover, the project's design incorporates a mezzanine level within the Neighborhood House space, introducing additional structural demands to the first floor area. Additionally, the gymnasium requires a high bay and long span, both of which are atypical for a first-floor space and further escalate construction costs.

Furthermore, the need for multiple entries to accommodate the various program elements of the Neighborhood House adds to the project's expenses. Having first-floor entries for the three-bedroom units is not the most efficient solution, as it hampers the maximization of the Neighborhood House's area and its seamless connection to shared elements like elevators, stairs, and waste disposal facilities.

The increased costs associated with the Neighborhood House's space will not qualify to be eligible basis for Low-Income Housing Tax Credits, so their space will not generate tax credits. In addition,

the Neighborhood House will only pay a nominal rent that covers common area maintenance and taxes for their space, which will not add net operating income to leverage more debt. Therefore, Neighorhood House's space significantly increases the funding gap for the project.

AA. **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    | 3    | 4    | 5    | 6    | 7    | 8    | 9    | 10   |
| INCOME                           | •        |      |      |      |      |      |      |      |      |      |
| Gross                            | SEE      |      |      |      |      |      |      |      |      |      |
| Potential Rent                   | ATTACHED |      |      |      |      |      |      |      |      |      |
| Vacancy                          |          |      |      |      |      |      |      |      |      |      |
| Other Income                     |          |      |      |      |      |      |      |      |      |      |
| Total Income                     |          |      |      |      |      |      |      |      |      |      |
| OPERATING<br>EXPENSES            |          |      |      |      |      |      |      |      |      |      |
| Marketing                        |          |      |      |      |      |      |      |      |      |      |
| Payroll                          |          |      |      |      |      |      |      |      |      |      |
| Other<br>Administrative<br>Costs |          |      |      |      |      |      |      |      |      |      |
| Management<br>Fees               |          |      |      |      |      |      |      |      |      |      |
| Utilities                        |          |      |      |      |      |      |      |      |      |      |
| Security                         |          |      |      |      |      |      |      |      |      |      |
| Maintenance<br>Expenses          |          |      |      |      |      |      |      |      |      |      |
| Property<br>Taxes                |          |      |      |      |      |      |      |      |      |      |
| Insurance                        |          |      |      |      |      |      |      |      |      |      |
| Reserves for<br>Replacement      |          |      |      |      |      |      |      |      |      |      |
| Total<br>Operating<br>Expenses   |          |      |      |      |      |      |      |      |      |      |
|                                  |          |      |      |      |      |      |      |      |      |      |
| Net Operating<br>Income          |          |      |      |      |      |      |      |      |      |      |
| Debt Service                     |          |      |      |      |      |      |      |      |      |      |
| Asset<br>Management              |          |      |      |      |      |      |      |      |      |      |
| Cash Flow                        |          |      |      |      |      |      |      |      |      |      |

|                                  | Year |
|----------------------------------|------|------|------|------|------|------|------|------|------|------|
|                                  | 11   | 12   | 13   | 14   | 15   | 16   | 17   | 18   | 19   | 20   |
| INCOME                           |      |      |      |      |      |      |      |      |      |      |
| Gross Potential<br>Rent          |      |      |      |      |      |      |      |      |      |      |
| Vacancy                          |      |      |      |      |      |      |      |      |      |      |
| Other Income                     |      |      |      |      |      |      |      |      |      |      |
| Total Income                     |      |      |      |      |      |      |      |      |      |      |
| OPERATING<br>EXPENSES            |      |      | I    |      |      |      |      |      |      |      |
| Marketing                        |      |      |      |      |      |      |      |      |      |      |
| Payroll                          |      |      |      |      |      |      |      |      |      |      |
| Other<br>Administrative<br>Costs |      |      |      |      |      |      |      |      |      |      |
| Management<br>Fees               |      |      |      |      |      |      |      |      |      |      |
| Utilities                        |      |      |      |      |      |      |      |      |      |      |
| Security                         |      |      |      |      |      |      |      |      |      |      |
| Maintenance<br>Expenses          |      |      |      |      |      |      |      |      |      |      |
| Property Taxes                   |      |      |      |      |      |      |      |      |      |      |
| Insurance                        |      |      |      |      |      |      |      |      |      |      |
| Reserves for<br>Replacement      |      |      |      |      |      |      |      |      |      |      |
| Total Operating<br>Expenses      |      |      |      |      |      |      |      |      |      |      |
|                                  |      |      |      |      |      |      |      |      |      |      |
| Net Operating<br>Income          |      |      |      |      |      |      |      |      |      |      |
| Debt Service                     |      |      |      |      |      |      |      |      |      |      |
| Asset<br>Management              |      |      |      |      |      |      |      |      |      |      |
| Cash Flow                        |      |      |      |      |      |      |      |      |      |      |

**K. OTHER SITE AMENTIES:** in the following space, describe the other site amenities for tenants and/or their guests.

#### (CONTINUED FROM APPLICATION)

#### **NEIGHBORHOOD HOUSE PROGRAMS:**

#### Wellness Classes: Yoga & Senior Fitness Classes

#### Adult Enrichment Classes: Spanish Conversation Hour

Adults with Disabilities:

- **New Beginnings Club:** A social program designed for people with disabilities. The Club offers various activities such as art-making, movie screenings, games, snacks, and socializing to foster new friendships.
- Work/Volunteer/Skills Training: This program provides opportunities and dedicated space for individuals with disabilities to practice essential work and life skills, including cleaning, organizing, light office work, and cooking.

Youth Programs:

- Afterschool/Off Day Programs: Tailored for elementary and middle school students, these
  programs provide a safe and enriching environment for kids during afterschool hours and offdays.
- **Summer Camps:** These exciting summer programs cater to youth ages 6 and up, running for 8 weeks from June to August.
- **Toddler True Play:** An engaging drop-in program open to children aged 5 and under, promoting deep and uninterrupted play. Trained adults facilitate True Play, fostering learning, growth, and development.
- Youth Adult Mentoring: This program pairs local youth aged 7-18 with young adults aged 18-30. The pairs meet at Neighborhood House twice a week for one hour, engaging in academic skill-building, positive relationship-building, community field trips, and social activities.
- Youth Employment: Community Impact Internships: An employment program open to youth in grades 9-12. Paid Community Impact Interns collaborate directly with Neighborhood House staff, focusing on youth development, food security, or center support. They also have the opportunity to develop and implement a project/program at the center.

### **NEIGHBORHOOD HOUSE SERVICES:**

**Food Pantry:** Open three days a week to everyone, Neighborhood House's Food Pantry is regularly stocked with fresh fruits and vegetables, staples like canned veggies and fruits, rice, noodles, boxed meals, soups, as well as eggs, meat, and dairy. Additionally, the pantry provides toiletries and household items upon request, including shampoo, body wash, feminine products, paper products, and more. No ID is required, and all are welcome to shop the variety of fresh and non-perishable food items, toiletries, and personal care products.

**Laundry:** The "Laundry Love" program offers free laundry service once a month at the Mound Street Laundromat (1306 Mound St.). Individuals can have a maximum of three loads, and Neighborhood House provides laundry detergent and covers the machine costs.

**Monthly Law Clinic:** In partnership with Community Justice, Inc., Neighborhood House hosts a free monthly legal aid clinic. Low-income individuals can receive legal advice and consultation from attorneys specializing in family law, landlord/tenant issues, small claims, discrimination matters, and more.

#### Meals:

- **Take and Bake Community Meals:** Held on the third Thursday of every month, these meals are handmade with fresh ingredients, each serving a family of 4-5 individuals.
- **Warm-up Wednesday:** Every Wednesday afternoon, hot meals, pastries, snacks, and drinks are served to those in need.

**Meeting Space:** Neighborhood House offers rental space for recurring meetings, programs, as well as one-time events like parties or baby showers.

**Resource and Housing Navigation:** The Neighborhood House staff assists individuals in finding housing, food, mental health resources, childcare, transportation, clothing, employment, and more.

Seasonal Services: Throughout the year, Neighborhood House offers various seasonal services, including free school supplies for kids, Thanksgiving baskets, holiday gifts for children, and winter clothing.

**Sunshine Line – Non-emergency Phone Line:** The Sunshine Line is a non-emergency/warmline phone service where individuals can call and speak to a friendly voice if they are feeling stressed, overwhelmed, or simply need someone to talk to.

**Transportation Assistance:** This program assists individuals in need of transportation for work, school, medical visits, food access, or childcare by providing bus passes or gas cards. Each individual can receive either one bus pass or one \$50 fuel gift card.

**Technology Lab:** Neighborhood House's Technology Lab is open to the public on Mondays and Fridays from 11 am to 1 pm. Users have free access to printing, high-speed internet, Microsoft Office Suite, and other basic programs. There are four computer stations available, and staff members are present to provide assistance as needed.

#### AA Operating Budget

NEIGHBORHOOD HOUSE APARTMENTS

|                                    |       | STABILIZED  |            |        |             |             |          |                |             |              |                    |           |
|------------------------------------|-------|-------------|------------|--------|-------------|-------------|----------|----------------|-------------|--------------|--------------------|-----------|
|                                    |       | Year 1      | Year 2     | Yea    | r 3         | Year 4      | Year 5   | Year 6         | Year 7      | Year 8       | Year 9             | Year 10   |
| RENTAL INCOME                      |       |             |            |        |             |             |          |                |             |              |                    |           |
| Residential                        | 2.00% | \$ 866,470  | \$ 883,799 | ); S   | 901,475 \$  | 919,504 \$  | 937,895  | \$ 956,652 \$  | 975,786 \$  | 995,301 \$   | 1,015,207 \$       | 1,035,511 |
| Other Income                       |       | \$ 11,750   | \$ 11,985  | 5\$    | 12,225 \$   | 12,470 \$   | 12,719   | \$ 12,973 \$   | 13,233 \$   | 13,498 \$    | 13,767 \$          | 14,043    |
| Potential Gross Income             |       | \$ 878,220  | \$ 895,784 | 4\$9   | 913,700 \$  | 931,974 \$  | 950,614  | \$ 969,626 \$  | 989,018 \$  | 1,008,799 \$ | 1,028,975 \$       | 1,049,554 |
| Residential Vacancy                | 7.00% | \$ (60,653) | \$ (61,866 | 5)\$   | (63,103) \$ | (64,365) \$ | (65,653) | \$ (66,966) \$ | (68,305) \$ | (69,671) \$  | (71,065) \$        | (72,486)  |
| EFFECTIVE GROSS INCOME             |       | \$ 817,567  | \$ 833,918 | 3\$8   | 350,597 \$  | 867,609 \$  | 884,961  | \$ 902,660 \$  | 920,713 \$  | 939,128 \$   | 957,910 \$         | 977,068   |
| OPERATING EXPENSES                 | 3.00% |             |            |        |             |             |          |                |             |              |                    |           |
| Marketing                          |       | \$ 3,090    | \$ 3,183   | 3\$    | 3,278 \$    | 3,377 \$    | 3,478    | 3,582 \$       | 3,690 \$    | 3,800 \$     | 3,914 \$           | 4,032     |
| Payroll                            |       | \$ 70,143   | \$ 72,24   | 7\$    | 74,415 \$   | 76,647 \$   | 78,947   | 81,315 \$      | 83,754 \$   | 86,267 \$    | 88,855 \$          | 91,521    |
| Other Administrative Costs         |       | \$ 10,506   | \$ 10,822  | 1\$    | 11,146 \$   | 11,480 \$   | 11,825   | \$             | 12,545 \$   | 12,921 \$    | 13,309 \$          | 13,708    |
| Management Fees                    | 6.00% | \$ 49,054   | \$ 50,035  | 5\$    | 51,036 \$   | 52,057 \$   | 53,098   | 54,160 \$      | 55,243 \$   | 56,348 \$    | 57,475 \$          | 58,624    |
| Utilities                          |       | \$ 52,221   | \$ 53,788  | 3\$    | 55,401 \$   | 57,063 \$   | 58,775   | 60,538 \$      | 62,355 \$   | 64,225 \$    | 66,152 \$          | 68,137    |
| Security                           |       | \$-         | \$-        | \$     | - \$        | - \$        | - 9      | 5 - \$         | - \$        | - \$         | - \$               | -         |
| Maintenance Expenses               |       | \$ 51,603   | \$ 53,153  | 1\$    | 54,746 \$   | 56,388 \$   | 58,080   | 59,822 \$      | 61,617 \$   | 63,465 \$    | 65 <i>,</i> 369 \$ | 67,330    |
| Property Taxes                     |       | \$ 132,694  | \$ 136,674 | 4\$1   | L40,775 \$  | 144,998 \$  | 149,348  | \$ 153,828 \$  | 158,443 \$  | 163,196 \$   | 168,092 \$         | 173,135   |
| Insurance                          |       | \$ 16,506   | \$ 17,002  | 1\$    | 17,511 \$   | 18,037 \$   | 18,578   | \$ 19,135 \$   | 19,709 \$   | 20,300 \$    | 20,909 \$          | 21,537    |
| Annual Replacement Reserve         | \$300 | \$ 18,540   | \$ 19,096  | 5\$    | 19,669 \$   | 20,259 \$   | 20,867   | \$ 21,493 \$   | 22,138 \$   | 22,802 \$    | 23,486 \$          | 24,190    |
| TOTAL OPERATING EXPENSES           |       | \$ 404,357  | \$ 415,997 | 7\$4   | \$127,976   | 440,305 \$  | 452,994  | \$ 466,053 \$  | 479,493 \$  | 493,325 \$   | 507,561 \$         | 522,214   |
|                                    |       | 49%         | 50%        | 6      | 50%         | 51%         | 51%      | 52%            | 52%         | 53%          | 53%                | 53%       |
| NET OPERATING INCOME               | ]     | \$ 413,210  | \$ 417,922 | 2\$4   | \$122,620   | 427,303 \$  | 431,967  | \$ 436,607 \$  | 441,221 \$  | 445,802 \$   | 450,349 \$         | 454,855   |
| DEBT SERVICE                       | l     |             |            |        |             |             |          |                |             |              |                    |           |
| A Bond/Construction/Perm Financing | 6.65% | \$ 359,313  | \$ 359,313 | 3 \$ 3 | 359,313 \$  | 359,313 \$  | 359,313  | 359,313 \$     | 359,313 \$  | 359,313 \$   | 359,313            | \$359,313 |
| Asset Management Fee               |       |             | \$ 5,150   |        | 5,305 \$    | 5,464 \$    | 5,628    | , ,            | 5,970 \$    | 6,149 \$     | 6,334 \$           | . ,       |
| CASH FLOW                          |       | \$ 48,897   | \$ 53,458  |        | 58,003 \$   | 62,526 \$   | 67,026   | , ,            | 75,937 \$   | 80,340 \$    | 84,702 \$          | 89,018    |

#### AA Operating Budget

NEIGHBORHOOD HOUSE APARTMENTS

|                                    |          |              |              | ~            |              |              |              |              | ¥ 46         |              |           |
|------------------------------------|----------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-----------|
|                                    |          | Year 11      | Year 12      | Year 13      | Year 14      | Year 15      | Year 16      | Year 17      | Year 18      | Year 19      | Year 20   |
| RENTAL INCOME                      |          |              |              | 1 000 000 Å  |              |              |              |              |              | 4 007 500 4  |           |
| Residential                        | Ş        | 1,056,222 \$ | 1,077,346 \$ | 1,098,893 \$ | 1,120,871 \$ | 1,143,288 \$ |              | 1,189,477 \$ | 1,213,267 \$ | 1,237,532 \$ | 1,262,283 |
| Other Income                       | <u>Ş</u> | 14,324 \$    | 14,610 \$    | 14,902 \$    | 15,200 \$    | 15,504 \$    | 15,814 \$    | 16,131 \$    | 16,453 \$    | 16,782 \$    | 17,118    |
| Potential Gross Income             | Ş        | 1,070,545 \$ | 1,091,956 \$ | 1,113,795 \$ | 1,136,071 \$ | 1,158,793 \$ | 1,181,968 \$ | 1,205,608 \$ | 1,229,720 \$ | 1,254,314 \$ | 1,279,401 |
| Residential Vacancy                | \$       | (73,936) \$  | (75,414) \$  | (76,923) \$  | (78,461) \$  | (80,030) \$  | (81,631) \$  | (83,263) \$  | (84,929) \$  | (86,627) \$  | (88,360)  |
| EFFECTIVE GROSS INCOME             | \$       | 996,610 \$   | 1,016,542 \$ | 1,036,873 \$ | 1,057,610 \$ | 1,078,762 \$ | 1,100,338 \$ | 1,122,344 \$ | 1,144,791 \$ | 1,167,687 \$ | 1,191,041 |
| OPERATING EXPENSES                 |          |              |              |              |              |              |              |              |              |              |           |
| Marketing                          | \$       | 4,153 \$     | 4,277 \$     | 4,406 \$     | 4,538 \$     | 4,674 \$     | 4,814 \$     | 4,959 \$     | 5,107 \$     | 5,261 \$     | 5,418     |
| Payroll                            | \$       | 94,266 \$    | 97,094 \$    | 100,007 \$   | 103,007 \$   | 106,098 \$   | 109,281 \$   | 112,559 \$   | 115,936 \$   | 119,414 \$   | 122,996   |
| Other Administrative Costs         | \$       | 14,119 \$    | 14,543 \$    | 14,979 \$    | 15,428 \$    | 15,891 \$    | 16,368 \$    | 16,859 \$    | 17,365 \$    | 17,886 \$    | 18,422    |
| Management Fees                    | \$       | 59,797 \$    | 60,993 \$    | 62,212 \$    | 63,457 \$    | 64,726 \$    | 66,020 \$    | 67,341 \$    | 68,687 \$    | 70,061 \$    | 71,462    |
| Utilities                          | \$       | 70,181 \$    | 72,286 \$    | 74,455 \$    | 76,688 \$    | 78,989 \$    | 81,359 \$    | 83,799 \$    | 86,313 \$    | 88,903 \$    | 91,570    |
| Security                           | \$       | - \$         | - \$         | - \$         | - \$         | - \$         | - \$         | - \$         | - \$         | - \$         | -         |
| Maintenance Expenses               | \$       | 69,350 \$    | 71,431 \$    | 73,574 \$    | 75,781 \$    | 78,054 \$    | 80,396 \$    | 82,808 \$    | 85,292 \$    | 87,851 \$    | 90,486    |
| Property Taxes                     | \$       | 178,329 \$   | 183,679 \$   | 189,189 \$   | 194,865 \$   | 200,711 \$   | 206,732 \$   | 212,934 \$   | 219,322 \$   | 225,902 \$   | 232,679   |
| Insurance                          | \$       | 22,183 \$    | 22,848 \$    | 23,534 \$    | 24,240 \$    | 24,967 \$    | 25,716 \$    | 26,487 \$    | 27,282 \$    | 28,100 \$    | 28,944    |
| Annual Replacement Reserve         | \$       | 24,916 \$    | 25,664 \$    | 26,434 \$    | 27,227 \$    | 28,043 \$    | 28,885 \$    | 29,751 \$    | 30,644 \$    | 31,563 \$    | 32,510    |
| TOTAL OPERATING EXPENSES           | \$       | 537,294 \$   | 552,815 \$   | 568,789 \$   | 585,231 \$   | 602,153 \$   | 619,570 \$   | 637,497 \$   | 655,949 \$   | 674,940 \$   | 694,488   |
|                                    |          | 54%          | 54%          | 55%          | 55%          | 56%          | 56%          | 57%          | 57%          | 58%          | 58%       |
| NET OPERATING INCOME               | \$       | 459,316 \$   | 463,727 \$   | 468,084 \$   | 472,380 \$   | 476,610 \$   | 480,767 \$   | 484,847 \$   | 488,843 \$   | 492,747 \$   | 496,553   |
| DEBT SERVICE                       |          |              |              |              |              |              |              |              |              |              |           |
| A Bond/Construction/Perm Financing |          | \$359,313    | \$359,313    | \$359,313    | \$359,313    | \$359,313    | \$359,313    | \$359,313    | \$359,313    | \$359,313    | \$359,313 |
| Asset Management Fee               | \$       | 6,720 \$     | 6,921 \$     | 7,129 \$     | 7,343 \$     | 7,563 \$     | 7,790 \$     | 8,024 \$     | 8,264 \$     | 8,512 \$     | 8,768     |
| CASH FLOW                          | \$       | 93,284 \$    | 97,495 \$    | 101,645 \$   | 105,728 \$   | 109,738 \$   | 113,670 \$   | 117,517 \$   | 121,273 \$   | 124,930 \$   | 128,482   |

# THE ALEXANDER COMPANY'S DEVELOPMENT AND PROPERTY MANAGEMENT EXPERIENCE

# DANE COUNTY AFFORDABLE HOUSING DEVELOPMENT FUND NEIGHBORHOOD HOUSE COMMUNITY CENTER

PREPARED BY



## MEET THE ALEXANDER COMPANY -

For over 40 years The Alexander Company has specialized in urban infill development, historic preservation, and affordable housing solutions.

Nationally recognized for urban development and historic preservation achievements, the Madison, Wisconsin-based Alexander Company is a leading force behind the creation of affordable, workforce housing communities and solutions. As a master developer, the Company oversees the financing, design, construction, marketing, and property management of developments in-house, providing a diverse team of experts for owners, investors, and partners.

COMMUNITIES<br/>impactedBUILDINGS<br/>developedUNITS<br/>developedRETAIL SPACE<br/>brokered (SF)462807,9281.8M

Alexander Company projects create new urban focal points and restore glory to important landmarks that define cities. The company has completed several mixed-use "urban renaissance" master-planned developments, incorporating new construction, historic preservation or both. The Company has won numerous industry awards, including the National Preservation Honor Award from the National Trust for Historic Preservation, the Best Historic Rehabilitation Project Award from Affordable Housing Finance, the Charles Edson Award from the Affordable Housing Tax Credit Coalition, The Paul Gruenberg Award for Best Adaptive Reuse of a Building, several National Main Street Awards, among many others.

The Alexander Company is separated from other firms by managing all services in-house, providing a one-stop-shop for all real estate needs. This approach results in a single source of accountability for the client and brings efficiency, transparency and ease of communication to the otherwise arduous process of real estate development.







## OUR APPROACH



#### **DEVELOPMENT AND FINANCE** Provides creative solutions

financial analysis, debt and equity procurement, land use evaluation, real estate acquisition and support, public regulatory approvals, scope control, communication and public presentations



#### IN-HOUSE DESIGN Ensures quality

architectural design drawings, architectural contract reviews and administration, master and precinct planned campuses, civic spaces and streetscape and landscape design, site and building evaluation, code review and administration, historic preservation services



#### CONSTRUCTION MANAGEMENT Avoids unexpected costs

construction contract review and administration, cost estimating, value engineering, scheduling, contractor qualification, contractor and sub oversight, contractor bid, construction close-out



#### MARKETING AND PUBLIC RELATIONS Integrates management of promotional tactics

earned media relations and publicity, business-to-business and businessto-consumer marketing, collateral creation, website development, signage, media planning and purchasing, digital marketing, event planning



#### **PROPERTY MANAGEMENT** Enhances property values through tested techniques

tenant retention programs, preventative maintenance programs, rent collection, lease preparation and audit, energy management, budget preparation, operations management, commercial brokerage, state and federal compliance, specifications review
# KEY PERSONNEL



### JOSEPHALEXANDER PRESIDENT

Joe's duties at The Alexander Company include senior management, development team oversight, stakeholder relations, new project development and operations oversight. He has overseen developments from Kansas City to Washington D.C. to Fort Worth. Joe has diverse experience in real estate administration, government and public relations. He has served as Special Assistant to the Secretary of the United States Department of Health and Human Services, where his duties included consultation and implementation in the areas of general management, budgeting and facilities development oversight.



## ADAM WINKLER DEVELOPMENT PROJECT MANAGER

Adam has extensive expertise in all aspects of the development process, from site identification and underwriting through due diligence and entitlement. His responsibilities include sourcing development and value-add opportunities for complicated, master-planned developments throughout the United States - for both historic rehabilitation and ground-up new construction. He has specific expertise in residential development, including high-quality multifamily housing as well as condominiums. In addition, Adam is adept at ensuring new developments adhere to The Alexander Company's programmatic, qualitative, and financial objectives, and maintains a handson approach throughout the entire development process. He also has experience in commercial real estate leasing and sales.



### JONATHAN BECK DEVELOPMENT PROJECT MANAGER

Jonathan has 22 years of real estate development and investment experience. He coordinates all aspects of the development process and has specific skills in structuring complex financial tax credit investments and working with community development programs. Jonathan is adept at ensuring new developments adhere to The Alexander Company's programmatic, qualitative, and financial objectives and maintains a hands-on approach through the entire development process.

Jonathan has extensive experience working both as an investor and consultant, having held previous positions with a low-income housing tax credit syndicator, the National Trust Community Investment Corporation, and Baker Tilly. He is a graduate of the University of Wisconsin with a degree in Real Estate & Urban Land Economics. Jonathan serves as President of the Wisconsin Historical Real Estate Foundation and is a board member of both the Wisconsin Historical Foundation and the Wisconsin Trust for Historic Preservation.





### CHRIS QUALLE, AIA, LEED AP DIRECTOR OF DESIGN & CONSTRUCTION

Chris brings over 20 years of experience in the field as both an architect and engineer. At The Alexander Company, Chris is responsible for coordinating and allocating design and construction management resources. Chris is also involved in feasibility studies, building and project assessments, programming, and design document creation. Chris welcomes opportunities to take preliminary design and refine it to ensure a project's success, applying effective new technologies whenever possible. He is committed to maintaining design excellence throughout the design and construction process, working with owners and consultants to solve the most challenging problems, and fostering close-knit relationships with all project team members.



### JEREMIAH LEIGH CONSTRUCTION PROJECT MANAGER

Jeremiah's position at The Alexander Company involves ensuring the most cost effective means and methods of construction are implemented to the benefit of the owners - by participating in both the construction document phase of design and construction itself, he ensures hidden conditions are mitigated to the greatest possible extent. As part of The Alexander Company's comprehensive approach to development, Jeremiah supervises the work of general construction contractors, ensuring budget conformity and only the highest quality of work.



### JENNI LIPPITT DIRECTOR OF PROPERTY MANAGEMENT

Jenni has over a decade of residential property management experience, and is responsible for overseeing financial operations of the entire Alexander Company residential portfolio. Her extensive experience in operations management, asset management, and corporate accounting combined bring an expertise in optimizing operations and ensuring only the highest level of efficiency. Jenni also has an applied knowledge and expertise in lease-up and value-add scenarios; market rate, tax credit, senior, and student properties; and all styles of housing from garden to high-rise.



### **KENDRA BISHOP** DIRECTOR OF MARKETING & PUBLIC RELATIONS

Kendra brings over 15 years of marketing and communications experience to The Alexander Company, where she is responsible for creating, implementing, and measuring all marketing communications and strategies on a national level. She works across departments and the leadership team to identify and maximize opportunities to bring The Alexander Company's mission and achievements to life through a diverse mix of marketing, advertising, and media campaigns using the full range of traditional and digital tools available.

# RECENT WORK



## Soldiers Home

The Alexander Company and the Housing Authority of the City of Milwaukee led a team of local organizations to rehabilitate and restore six buildings at the Milwaukee VA Soldiers Home, a National Historic Landmark District located on the grounds of the Milwaukee VA Medical Center.

The Soldiers Home is beloved by veterans who believe its recuperative powers should remain accessible to aging Vietnam War vets and returning Iraq War and Afghanistan War vets.

The buildings were restored to their original purpose – the service of veterans, and now provide 101 housing units with supportive services for veterans and their families who are homeless or at risk of becoming homeless.



## Liberty

Located outside the District of Columbia in Fairfax County, Virginia, the historic Lorton Prison, originally commissioned by Theodore Roosevelt in the early 20th century, has been transformed through a public-private partnership. The Alexander Company, Elm Street Development, and Fairfax County re-imagined the unique prison complex into Liberty - a vibrant hub of various styles of housing serving a range of incomes, a central great lawn for markets and events, and 174,000 square feet of commercial space, anchored by a major grocer.

Sitting along I-95, the new community has all the conveniences of urban living – access to major commuting transportation routes, everyday shopping, urban amenities, etc. – all while retaining a beautifully natural and historic character.





## Artisan Village

The Alexander Company partnered with Bear Development to create a unique, much-needed 169-unit workforce housing community in Madison.

The collection of six buildings - ranging from 17,000 to 35,000 square feet each, are organized around a central green space and clubhouse building. With the goal of creating a unique sense of place and vibrant community, Artisan Village embraces a robust amenity package and variety of apartment styles - from live/work apartments catering to creators and entrepreneurs, to lofts and flats with tuck-under garage parking.



## Paragon Mill

The 125,000-square-foot complex located at the "front door" of Olneyville is officially known as the Earnscliffe Worsted Mill/Paragon Worsted Company Mill Complex and is located on the Woonasquatucket River. Paragon Mill represents an important connection to Providence's industrial heritage, the way people lived and worked, and the use of the Woonasquatucket River as an economic engine.

The rehabilitation efforts restored Paragon Mill to its former glory and returned a historic icon to the city it was built to serve. In concert with elevated living quarters, Paragon Mill features a robust amenity package with active and passive civic spaces, bringing the entire campus to life and providing gathering spaces at the heart of the community.

# RECENT WORK



## Schoolhouse Yards

At the site of the former Sugar Creek Elementary School just minutes from downtown Verona stands a new high-quality, workforce housing community. With modern farmhouse stylings, Schoolhouse Yards offers townhome style apartments - many with private walk-up entries, or direct private garage access. The intent was to offer the quality of life and privacy of home ownership in a multi-family setting.

Schoolhouse Yards is part of a master-planned community led by local real estate developers The Alexander Company and Steve Brown Apartments, who were selected to lead this redevelopment effort through a competitive, public proposal process with the City of Verona. Other elements include boutique retail and a mix of park and cultural facilities.



## Dan River Falls

Once part of the sprawling textile operation along the Dan River, White Mill - now dubbed Dan River Falls, is one of the last remaining physical expressions of Danville's role as a textile-manufacturing powerhouse. The Alexander Company has partnered with the Danville Industrial Development Authority to restore the iconic 550,000-square-foot building to its former glory.

The distinctive, reinforced-concrete structure is being transformed into a community hub with a mixture of complimentary uses including housing, office, and retail, nestled within a new riverfront park to be enjoyed by all. This longawaited development is a re-imagining steeped in history, with Danville's past, present, and future reflected throughout.







## Printworks Mill

One of the few remaining sizeable, historic sites in Greensboro, North Carolina, has undergone a major restoration. Printworks Mill was once one of the most innovative fabric-printing mills in the South, reduced to a shell with flooded floors, broken windows, and a gaping roof exposing the interior to the elements. This rehabilitation adds a new component to what is being dubbed as a new "Mill District." Printworks was once part of the Cone Mills textile empire, which provided the industrial backbone of Greensboro in the early 20th Century and spawned the mill village that set the pattern for working-class residential neighborhoods that remain today. The roughly 470,000 square-foot building now offers mixedincome residential apartments, interior parking, retail space, and climate-controlled self-storage facilities

## 2500 Rimrock Lofts

2500 Rimrock provides 12,000 square feet of commercial space on the first floor and 43 residential mixed-income apartments on floors two through four. The building serves as a symbol of the diversity intended for the entire Novation Campus – a mix of retail, office, and residential combined into a single expression. The cohesive color pallet, mix of materials, and modern architectural form gives the building an independent identity while remaining identifiable as part of the greater Novation Campus Master Development.

The site plan and architecture work jointly to preserve and reinforce open space, landscape and pedestrian circulation. The building is set back from the corner to allow for underground parking as well as a patio space for the retail component.

# EXPERIENCE

## Section 42

One of the thrusts of The Alexander Company has always been providing and managing quality, affordable housing in downtown cores and areas most in need. This is done not only for sustenance, but because it aligns with company values.

Presently, The Alexander company owns and/or manages 12 Section 42 properties - increasing to 16 properties in the next 90 days. The vast majority of Alexander Company communities have entailed an affordable housing component, and the company has been working with the LIHTC program since its inception in 1986. Their proven success lies in their experienced in-house compliance team, who certifies income and expenses for applicants and residents, ensures program compliance, provides reporting to regulatory agencies, provides staff training on program compliance and fair housing, and conducts internal audits and reports.

## Public-private Partnerships

Nationally recognized for achievements in urban infill and adaptive reuse, nearly every endeavor The Alexander Company pursues consists of a public-private partnerships that entails re-imagining an underused site or structure, demonstrating a history of success spanning over 40 years.

We draw your attention to one of our latest projects: Soldiers Home - a historic campus on the grounds of the Milwaukee VA Medical Center, turned into 101 units of housing for homeless and at-risk veterans. This true public-private partnership was completed in March 2021. The Soldiers Home redevelopment was extraordinarily complex in terms of partnerships created, the financing structure, and design principals given the involvement of a National Historic Landmark.

The Department of Veterans Affairs was involved in all aspects of the project, including issuing the initial RFP and managing the Enhanced Use Lease, which required an Act of Congress to be signed and executed. The Housing Authority of the City of Milwaukee was brought in as an owner to operate the facilities, with the Milwaukee VA providing case management and supportive services, and Center for Veterans Issues leading facility operations. The Greater Milwaukee Foundation - a non-profit entity, managed and received individual donor contributions for the fundraising campaign. Milwaukee Preservation Alliance - a non-profit entity, served as the fiscal agent for the campaign, assisting with fundraising and providing public outreach. The Alexander Company creatively arranged a complex capital stack to finance the \$45M project through the use of no less than 13 different capital sources, negating the need for permanent debt.

# Supportive Services

The Alexander Company again draws your attention to Soldiers Home - a provided project example. In partnership with the neighboring Milwaukee VA Medical Center, a wide variety of supportive services are provided for veterans living at Soldiers Home. These services include case management, education training and employment assistance, benefits assistance, temporary financial assistance, peer-to-peer counseling, sobriety maintenance, and more.

## Property Management

Drawing on over 40 years of residential property management experience, with working knowledge through the management of over 7,000 units of housing, we apply best practices to provide comprehensive services.

In both residential, commercial, and mixed-use properties, The Alexander Company's property management expertise lies in marketing and leasing, affordable housing compliance, market-rate property management, asset management, and preventative maintenance. Simply put, we're well-versed in the day-to-day management and maintenance needs of a variety of property types, and have experience with a range of affordable housing programs.

|                                   |             |       |           |             | AFFORDABLE |
|-----------------------------------|-------------|-------|-----------|-------------|------------|
| PROJECT                           | CITY        | STATE | COMPLETED | TOTAL UNITS | UNITS      |
| 2500 Rimrock                      | Madison     | WI    | 2015      | 43          | 9          |
| 4th Street Lofts                  | Davenport   | IA    | 2007      | 53          | 37         |
| Antigo Depot                      | Antigo      | WI    | 1992      | 34          | 34         |
| Arcade                            | Racine      | WI    | 1993      | 75          | 75         |
| Artisan Village                   | Madison     | WI    | 2020      | 169         | 169        |
| Balzer Wagon Works                | Sheboygan   | WI    | 1992      | 53          | 53         |
| Central High School               | South Bend  | IN    | 1995      | 106         | 81         |
| Central Station                   | Memphis     | TN    | 1999      | 63          | 63         |
| City Hall Square                  | Milwaukee   | WI    | 1996      | 146         | 146        |
| Courthouse Lofts                  | Kansas City | MO    | 2011      | 176         | 176        |
| Davenport Lofts                   | Davenport   | IA    | 2005      | 73          | 50         |
| Dunlap Square                     | Marinette   | WI    | 1992      | 97          | 97         |
| Eighth Street Lofts               | Sheboygan   | WI    | 1992      | 24          | 24         |
|                                   | Fond du     |       |           |             |            |
| Eldorado                          | Lac         | WI    | 1992      | 28          | 28         |
| Electric Building                 | Fort Worth  | ТХ    | 1995      | 108         | 66         |
| Fox River Mills                   | Appleton    | WI    | 1992      | 188         | 188        |
| Hillcrest                         | Toledo      | ОН    | 1996      | 106         | 54         |
| Irving School                     | Duluth      | MN    | 1997      | 44          | 39         |
| Jung Shoe Factory                 | Sheboygan   | WI    | 1992      | 53          | 53         |
| Kerker Lofts                      | Davenport   | IA    | 2012      | 18          | 18         |
| Lahr Hotel                        | Lafayette   | IN    | 1994      | 74          | 56         |
| LaSalle                           | Toledo      | ОН    | 1996      | 131         | 131        |
| Lauerman Department Store         | Marinette   | WI    | 1992      | 97          | 97         |
| Lawton Foundry                    | De Pere     | WI    | 1993      | 70          | 70         |
| LeClaire Hotel                    | Moline      | IL    | 1995      | 110         | 110        |
| Leverenz                          | Sheboygan   | WI    | 1992      | 21          | 21         |
| Liberty Crest                     | Lorton      | VA    | 2017      | 171         | 45         |
| Louis Joliet                      | Joliet      | IL    | 2003      | 61          | 48         |
| Merrill City Hall                 | Merrill     | WI    | 1994      | 16          | 13         |
|                                   | Silver      |       |           |             |            |
| National Park Seminary Apartments | Spring      | MD    | 2009      | 66          | 56         |
| National Terminal                 | Cleveland   | ОН    | 1996      | 249         | 106        |

| North River Block     | Berlin      | WI | 1991 | 10  | 10  |
|-----------------------|-------------|----|------|-----|-----|
| Paragon Mill          | Providence  | RI | 2022 | 101 | 44  |
| Pheasant Ridge        | Madison     | WI | 2012 | 42  | 39  |
| Printworks Mill       | Greensboro  | NC | 2020 | 217 | 143 |
| Professional Building | Kansas City | MO | 2006 | 132 | 132 |
| Schoolhouse Yards     | Verona      | WI | 2023 | 101 | 101 |
| Sieg Iron Lofts       | Davenport   | IA | 2006 | 33  | 33  |
| Soldiers Home         | Milwaukee   | WI | 2019 | 101 | 101 |
| Stephenson Mill       | South Bend  | IN | 1994 | 39  | 13  |
|                       | Fond du     |    |      |     |     |
| The Calumet Hotel     | Lac         | WI | 1992 | 55  | 55  |
| The Whiting Hotel     | Berlin      | WI | 1990 | 11  | 11  |
| Wilmanor              | Racine      | WI | 1994 | 37  | 37  |
| WP&L Power Building   | Berlin      | WI | 1992 | 18  | 18  |

# AFFORDABLE HOUSING DEVELOPMENT SITES MAP



# FAIR TENANT SELECTION PLAN

## **Fair Tenant Selection Criteria**

Thank you for applying to live at Neighborhood House Apartments. These criteria explain the process we use to select our residents. The Neighborhood House/The Alexander Company Inc. is an Equal Housing Opportunity provider, and it is our policy to treat all residents and visitors fairly and consistently without regard to race, color, religion, sex, national origin, disability, or familial status. This community and its employees comply with the provisions of Title VIII of the Civil Rights Act of 1968, the Fair Housing Amendments Act of 1988 ("Fair Housing Act"), the Violence Against Women Act, and, to the extent applicable, the Americans with Disabilities Act. Furthermore, this community complies with the state and local fair housing regulations of the jurisdictions in which it is located. This community also follows all HUD guidelines under the Section 42, Low Income Housing Tax Credit program (LIHTC).

### **BASIC ELIGIBILITY REQUIREMENTS**

- Valid photo identification for all residents over the age of 18.
- A valid Social Security number for all household members. If a Social Security card is not available, the community will accept a letter from the Social Security Administration stating that a new card has been applied for.
- Proof of all income. Rental assistance is allowed and considered as part of this requirement.
- All applicants must have income to support 1 ½ times monthly rent amount or can provide 24 months of on-time rent payments of rental history for the same or similar rent amount.
- This community requires all residents to provide all income and asset information to determine eligibility for housing. Rent is not determined by the annual income of the individual. It is based on the program the apartment follows. The chart below shows the maximum income allowed for the household under the four programs.

| Household<br>Size | 30% AMI<br>Program | 40% AMI<br>Program | 50% AMI<br>Program | 60% AMI<br>Program |
|-------------------|--------------------|--------------------|--------------------|--------------------|
| 1 person          | \$ 25,650          | \$ 34,200          | \$ 42,750          | \$ 51,300          |
| 2 persons         | \$ 29,310          | \$ 39,080          | \$ 48,850          | \$ 58,620          |
| 3 persons         | \$ 32,970          | \$ 43,960          | \$ 54,950          | \$ 65,940          |
| 4 persons         | \$ 36,630          | \$ 48,840          | \$ 61,050          | \$ 73,260          |
| 5 persons         | \$ 39,570          | \$ 52,760          | \$ 65,950          | \$ 79,140          |
| 6 persons         | \$42,510           | \$ 56 <i>,</i> 680 | \$ 70,850          | \$ 85,020          |

Maximum Income Restrictions by Household Size Effective 05/01/2023

### THE APPLICATION PROCESS

Prospective tenants must submit one application and a non-refundable application fee per applicant over the age of 18. Once the application is approved and the available apartment is accepted, the applicant will sign a lease agreement in which the applicant agrees to abide by all the rules and regulations. If an applicant is denied, applicant will receive an email or letter stating the reasons for the denial. Falsification of any information on the application is basis for automatic denial. Upon approval based on credit, criminal and rental history, the applicant will complete the income and asset verification portion of the process to determine eligibility under the LIHTC requirements.

#### Continue to next page

**The Waiting List:** If a unit is not available, interested parties may join the waiting list. Applications will be processed in the order received with application fee. Applicants will be contacted when a unit becomes available. Failure to respond to attempted contacts will result in removal from the waiting list. The waitlist will prioritize individuals on the Community Wide Prioritization List Through Coordinated Entry. Non-chronic individuals or small families (one child under 2 years of age) from the List will be moved to the top of the waiting list. Individuals in the most need of permanent housing at risk of homelessness and domestic violence survivors will be offered units ahead of anyone else on the waiting list.

**Credit Screening:** A report will be obtained through a commercial credit-reporting agency. If the applicant has filed bankruptcy and it has not been discharged, the application will automatically be denied. Medical or student related loans or collection status is not a factor for denial. History of significant or repeated delinquencies is acceptable with proof of letter of payment arrangements or enrollment in a financial literacy program. Each applicant will receive the name, address, and contact information for the credit bureau to report or dispute any information the applicant finds to be inaccurate. Applicant will not be denied based solely on credit score or any information on the credit report that is under dispute or in repayment.

**Rental History:** Rental history for the past 2 years must indicate the ability to care for the property without damage. Previous evictions and/or judgments for rent require proof of payment agreement or satisfaction by Landlord. Applicant will not be denied solely due to lack of housing history. A security deposit in the amount of one month's rent or co-signor may be required for applicants with no housing history. An applicant that can demonstrate the ability to satisfy housing related expenses such as utilities or rent will be considered regardless of ratio to income.

**Occupancy:** No more than 2 adults and one child under the age of 2 may occupy a one bedroom apartment. No more than 4 individuals may occupy a 2 bedroom apartment, no more than 6 individuals may occupy a three bedroom apartment.

**Criminal Record Checks:** All applicants and household members over 18 years of age will be screened for criminal history. All applicants shall disclose in their application if any household member(s) have criminal charges pending at the time of application and if so, where and what the pending criminal charges are. A denial for criminal activity will only result if a conviction has been determined. Any pending cases may require an application to wait until the case has been determined by a court. Charges without conviction will not be considered a basis for denial. A history of any of the following by any household member is cause for denial of an application for housing:

- I. A felony conviction or adjudication other than an acquittal of sex offenses (including but not limited to forcible rape, child molestation, and aggravated sexual battery), arson, crimes involving explosives, and the illegal manufacture of controlled substances or manufacture of illegal drugs.
- II. Within 10 years from the completion of any sentence, probation, or parole for a felony that involved damage to or destruction of property, bodily harm against a person, including but not limited to: murder, homicide, manslaughter, armed robbery, aggravated assault, or any felony of violence that may establish that the applicant constitutes a direct threat to the health or safety of other individuals or to the property.
- III. Within 5 years from the completion of any sentence, probation, or parole for a felony that involved stalking, weapon offenses, burglary, theft, auto theft, buying receiving or possession of stolen property, or sales or trafficking in an illegal drug or controlled substance.
- IV. Within 2 years from the completion of any sentence, probation, or parole for any misdemeanor or ordinance violation for a crime of violence that may establish that the applicant constitutes a direct threat to the health or safety of other individuals or the property.
- V. Registry on the Sex Offenders Registry.

Revised 07/23/2023

**Approval:** If an applicant is approved, a copy of the lease shall be provided for review by applicant. Once the lease is signed, a security deposit equal to half of one month's rent is due prior to lease start date. Payment plans are available. Co-signors or a higher security deposit not to exceed one month's rent may be required for applicants with conditional credit or housing history or lack there-of.

**Denial:** Any applicant that is denied will be provided a written letter of denial with instructions on how to receive a copy of their credit or background report as well as instructions on how to appeal the decision. Appeals will be reviewed by the property's Area Manager and Compliance Manager. An applicant will have three days to contest an initial denial notice before it becomes final. The denied applicant will be given the opportunity to dispute the cause for denial in person, over the phone or by virtual meeting. The appeal meeting will be held by the Compliance Manager or Regional Property Manager. Individuals who are denied are allowed to re-apply after a period of 6 months.

**Security Deposits:** Once an application is approved, a copy of the lease will be provided for review. Once the lease is signed, a security deposit equal to half of one month's rent will be due prior to move-in. A co-signor or additional deposit not to exceed one month's rent may be required for conditional credit and background reports or lack there-of. Payment plans are available.

### **UNIT TRANSFER POLICIES**

All transfer requests must be made and submitted in writing to management. Under these conditions, unit transfer requests will take priority to the waitlist applicants:

- 1. Reasonable Accommodation Requests
- 2. HUD/Tax Credit Compliance

#### **PRIVACY POLICY**

It is the policy to guard the privacy of individuals conferred by the Federal Privacy Act of 1974 and to ensure the protection of such individuals' records maintained. Therefore, neither The Neighborhood House nor its agents shall disclose any personal information contained in its records to any person or agency unless the individual about whom the information is requested shall give written consent to such disclosure.

The Privacy Policy in no way limits The Neighborhood House's ability to collect such information as it may need to determine eligibility, compute rent, or determine an applicant's suitability for residency. Consistent with the intent of Section 504 of the Rehabilitation Act of 1973, any information obtained on handicap or disability will be treated in a confidential manner.





# DESIGNATED PROPERTY MANAGEMENT PARTNER LETTER



July 19, 2023

Samuel Brown Neighborhood House Community Center 29 South Mills Madison, WI 53715

Dear Sam,

As your development partner on the redevelopment of the Neighborhood House Community Center, we are also honored to be providing property management services to the project.

Drawing on over 40 years of residential property management experience, with working knowledge through the management of 7,000+ units, we apply best practices to provide comprehensive property management service. We're well-versed in the day-to-day management and maintenance needs of a variety of property types and have vast experience with a range of affordable housing programs.

One of the thrusts of The Alexander Company has always been providing and managing quality affordable housing in downtown cores and areas most in need. This is done not only for sustenance, but because it aligns with company values. Our customer-focused service and operations ensures long-term resident satisfaction and asset performance.

The Alexander Company is separated from other firms by managing all services in-house, providing a one-stop-shop for all real estate needs. This approach results in a single source of accountability for the client and brings efficiency, transparency, and ease of communication to the otherwise arduous process of real estate development and management.

We helped the project team develop the Fair Tenant Selection Criteria and have drafted the attached Tenant Selection Plan accordingly. In addition, we have reviewed the Tenancy Addendum in the application and will include these requirements in the lease documents.

Once again, we are excited to be your partner on this project. Please let me know if you have any questions about The Alexander Company's role as the project's property management company.

Sincerely,

The Alexander Company, Inc.

Joseph M. Alexander President

# DESIGNATED SUPPORTIVE SERVICES PARTNER LETTER



Brian Peddle General

Commissioner Brad Bailey Territorial Commander

Major Steven J. Merritt Divisional Commander Captain Michael Sjogren Capital Area Coordinator Madison Temple Corps Officer

**Captain Kristina Sjogren** Capital Area Program Director Madison Temple Corps Officer

Captains Vong and Ting Luangkhamdeng Madison Genesis Corps Officers

July 21, 2023

Mr. Joseph Alexander The Alexander Company, Inc. 2450 Rimrock Road Suite 100. Madison, WI 53713 Mr. Samuel Brown The Neighborhood House 29 South Mills Street Madison, WI 53715

RE: WHEDA Tax-Credit Rental Housing Development The Neighborhood House Project – 29 S Mills St, Madison, WI 53715

Dear Mr. Alexander & Mr. Brown,

The Salvation Army is a worldwide religious and charitable organization dedicated to serving those in need without discrimination. In Dane County, we have one worship and community center and two homeless shelters. Alongside the Single Women's Shelter and the Emergency Family Shelter, The Salvation Army of Dane County host six housing programs and a Diversion Program – an effort to keep families and individuals from entering the shelter system at all.

My understanding is that The Neighborhood House Project Apartments, located at 29 S Mills St, will be an affordable rental development that will create approximately 12 supportive housing units for individuals/families earning 30% or less of the Dane County area median income. The target population for these supportive housing units is individuals/families whose incomes qualify for the 30% rent restricted units. The available 12 supportive housing units will be generally spread across a mix of 1, 2, & 3 bedroom units at the 30% rent restricted level, but the Alexander Company will work with The Salvation Army to target units types with the greatest need which is currently understood to be slightly greater for 2 and 3 bedroom units but generally needed across all unit types. The Alexander Company will notify the Salvation Army of the number of supportive housing units to be targeted for Salvation Army referrals as the project progresses, but currently anticipates approximately 12 units to be targeted to Salvation Army referrals.

The Salvation Army will refer individuals and families that it provides assistance to under our Dane County Assists With New Starts (DAWNS) program and our RISE program to The Neighborhood House Apartments. Individuals and families transitioning from homelessness to housing can be offered a rapid rehousing package through our DAWNS and RISE programs. This package consists of weekly case management sessions, security deposit, and first month's rental assistance for the DAWNS program and up to a years' rental assistance in our RISE program. Additional rental assistance may be granted on an individual case by case basis. Case management support can last up to two years and will be provided at the resident's apartment or Salvation Army offices. The Salvation Army will extend its monetary rental resources and caseworker support under our DAWNS and RISE programs to individuals/families that it prefer to live at The Neighborhood House Apartments.

The Salvation Army strongly supports the proposed apartment community that the Alexander Company and Neighborhood House intend to build as a new affordable housing option that will assist the City of Madison and Dane County's efforts to promote housing stability and/or prevent homelessness.

If you have any questions feel free to call me at (608)-250-2237.

Sincerely,

Miliar &

Melissa Sorensen Executive Director of Social Services The Salvation Army of Dane County

# ENERGY CERTIFICATION OF REGISTRATION

If you are experiencing functionality problems with the Online Partnership Agreement, your browser may be out of date. Please update your browser to the latest version or try using a different browser. <u>More Information</u> (/opa/OpaBrowserSupportNotification). ×

# online partnership agreement Home Builders and Developers

Contact ENERGY STAR | Exit Application

Your Organiz...

Your Partner... Ve

Verification ...

Contacts

Review

Sign and Su...

Next Steps

# Your ENERGY STAR and Indoor airPLUS Partnership Agreements Have Been Submitted

Thank you for submitting your application to become an ENERGY STAR and Indoor airPLUS partner. Your Partnership Agreement Reference Number is **PA-0005200-20230724**. Please save this number or print this page for reference.

Here is what to expect next:

- The Energy Rating Company and/or Quality Assurance Provider (QAP) that you specified in your Partnership Agreement will be confirmed by EPA.
- Once your Partnership Agreement is approved, those individuals designated as Primary Contacts will receive an email with a username and password for accessing partner-only resources on the ENERGY STAR and Indoor airPLUS websites, including program logos and co-brandable resources.

Until then, please review the ENERGY STAR website for New Construction Professionals (https://www.energystar.gov/index.cfm?c=bldrs\_lenders\_raters.pt\_bldr) and the Indoor airPLUS website for Builders, Raters, and Providers (https://www.epa.gov/indoorairplus/indoor-airplus-builders-raters-providers) for additional information about working with the programs. If you have any additional questions about the programs or the status of your Partnership Agreement, please contact us at ENERGY STAR (mailto:energystarhomes@energystar.gov? subject=Agreement%20Status%20#PA-0005200-20230724%20[OPA]) or Indoor airPLUS (mailto:Indoor\_airPLUS@epa.gov), as appropriate.

Additional Partnership Opportunities - WaterSense

Through the <u>WaterSense<sup>®</sup> (https://www.epa.gov/watersense/)</u> program, builders can partner with EPA and access tools to promote their homes' water-efficient features. Builder partners can earn the WaterSense label for homes that are certified to meet this <u>criteria for performance and efficiency</u> (<u>https://www.epa.gov/watersense/specifications-and-certifications</u>).

Become a WaterSense Partner



Exit Application

EPA Form Number: 5900-188

# LETTERS OF SUPPORT



## Alder Tag Evers Thirteenth District

City-County Building, Room 417 210 Martin Luther King, Jr. Blvd. Madison, WI 53703 Phone: (608) 266-4071 | Fax: (608) 267-8669 <u>district13@cityofmadison.com</u> www.cityofmadison.com/council/district13

July 24, 2023

Casey Becker Division Administrator Dane County Department of Human Services Division of Housing Access & Affordability City-County Building 210 Martin Luther King Jr. Blvd. Madison, WI 53703

### Subject: 2023 Dane County Affordable Housing Development Fund Neighborhood House Community Center Redevelopment

Dear Casey:

I am writing this letter to express my enthusiastic support for the Neighborhood House Community Center Redevelopment Project, a joint effort by The Alexander Company and Neighborhood House Community Center. As the elected representative of our community, I recognize the immense value of this project, which aims to enhance the lives of residents in the Greenbush Neighborhood.

Neighborhood House Community Center holds a special place in the hearts of many, having served the Greenbush Neighborhood for over a century. The center's unwavering commitment to providing a diverse range of programs and services has made it a vital resource for our community, offering social services, youth programs, adult enrichment classes, and hosting various community groups. These services have been instrumental in fostering a sense of belonging and support among the residents of Madison's south and west sides.

The Neighborhood House Board of Directors and its members have taken a unique approach to redeveloping the current facility to better serve the ever-evolving needs of our community. The proposed mixed-use, mixed-income community, in collaboration with The Alexander Company, will not only expand the capacity of the community center but also provide much-needed affordable housing to a wide range of income levels.

One of the most significant challenges faced by many of our community members is access to safe, affordable housing. This project offers a unique opportunity to address this critical issue head-on. With affordable housing options ranging from 30% of the area median income (AMI) to market rate, the development will cater to individuals and families from diverse socioeconomic backgrounds. This deliberate focus on economic diversity aligns closely with the values of our community and fosters an environment of inclusivity and shared prosperity.

July 24, 2023 Page 2

Neighborhood House Community Center's commitment to providing essential services to our residents, including social assistance, food pantry, recreation areas, and educational support, is commendable. The upgraded facilities, such as art rooms, a commercial kitchen for community meals, and a new computer lab, will further empower residents to access the resources they need to thrive and achieve their full potential.

I am proud to support this transformative project that reflects the values and aspirations of our community. The Neighborhood House Community Center Redevelopment Project not only represents a significant investment in our residents' well-being but also serves as a testament to our commitment to fostering a diverse, inclusive, and vibrant community.

I wholeheartedly endorse this project and will actively advocate for its success within the appropriate channels.

Thank you for your dedication to serving our community, and I look forward to the positive impact this project will have under your support and leadership.

Sincerely,

Tay Ever

Alder Tag Evers District 13

CC: Supervisor Chuck Erickson District 23 Aris Blevins President Greenbush Neighborhood Association

23rd July 2023

Jenna Wuthrich Department of Human Services Division of Housing Access & Affordability

Dear Ms. Wuthrich,

I am writing to express the strong support of the Greenbush Neighborhood Association for the Neighborhood House redevelopment project that is seeking funding from Dane County Affordable Housing Development Funds. We received details about the project from the Alexander Company development team and Neighborhood House representatives at our July 10th meeting and were extremely impressed by what we heard. Neighborhood House offers a wide variety of services to our diverse community, and has been an integral part of the neighborhood for over a century. In recent years Laura and her team have expanded services to meet the needs of our changing community. Growing families rely on the food pantry, after school services, and summer programs, our aging residents rely on it as a social touchstone, and as evidenced by our recent Native Garden Day project they are central to the culture of Greenbush.

All of this work is done in modest accommodations that flex and stretch to face all needs. Seeing the plans for a vastly expanded space for the work of the community center, alongside affordable housing options that will increase their impact was thrilling. Our council was impressed by the amount of new space, the number and variety of housing options, and the thoughtful funding/ownership model of the project. I feel confident that this redevelopment will make a significant positive impact on our community, and make real strides in creating more affordable housing within our neighborhood. Upgrading the community center to be a neighborhood hub that brings more people into our unique part of Madison is a needed and welcome change.

I encourage you to approve funding the Neighborhood House project with Dane County Affordable Housing Development Funds. As I understand it, the project will be able move forward quickly with Dane County's support behind it and we want to see that happen.

Sincerely,

Aris Blevins President, Greenbush Neighborhood Association



PARTNER OF

202 S. Park Street Madison, WI 53715 (608) 417-6000

July 21, 2023

Alder Tag Evers District 13 2329 Keyes Avenue Madison, WI 53711

Dear Alder Evers,

I am writing this letter on behalf of UnityPoint Health – Meriter to express our enthusiastic support for the proposed redevelopment of Neighborhood House Community Center. As a local healthcare institution deeply committed to the well-being of our community, we recognize the immense value of this project and its potential to enhance the lives of residents in the Greenbush Neighborhood.

Meriter is not only dedicated to providing exceptional healthcare services but also fostering a supportive environment for our team and community members. We are thrilled to learn about the plans for the new mixed-use, mixed-income community at Neighborhood House's present site, which will provide affordable housing options to a variety of income levels. This development aligns perfectly with our mission to address social determinants of health and improve the overall well-being of our team members and the community we serve.

By offering housing options at affordable rates the project will have a profound impact on the quality of life for many members of our hospital team, enabling our employees to save money, invest in their futures, and improve their overall financial stability. The proximity of the affordable housing development to our hospital will significantly reduce commuting times, allowing team members to spend more time with their families and engage in community activities. Such housing would also support patients that we serve.

Meriter is proud to support a project that promotes inclusivity and upward mobility. We firmly believe that the redevelopment of Neighborhood House Community Center will create a lasting positive impact, enhance the well-being of our staff, and strengthen the bond between the hospital and the community.

Please feel free to reach out to us if there is any additional information or support we can provide to help make this project a reality.

Sincerely,

James Arnett Market President UnityPoint Health-Meriter