

**Dane County – Department of Human Services
Division of Housing Access & Affordability
Dane County Affordable Housing Development Fund 2023**

Yellowstone Apartments



**Due Date:
July 25, 2023**

**Prepared by:
Mark Hammond
MSP Real Estate, Inc.
7901 West National Avenue
West Allis, WI 53214
612-868-9997**



July 21, 2023

Jenna Wuthrich
Dane County – Department of Human Services
Division of Housing Access & Affordability
210 Martin Luther King Jr Blvd
Madison, WI 53703

RE: Dane County Affordable Housing Development Fund (AHDF) 2023

Dear Jenna,

MSP Real Estate Inc. is pleased to present our application for Dane County's 2023 Affordable Housing Development Fund for our affordable housing development, Yellowstone Apartments. Yellowstone Apartments will be located in the Odana Area at 426 South Yellowstone Drive in Madison, WI. The site is located in a "Preferred Transit Oriented Development Area" under the City of Madison 2023 Affordable Housing Targeted Area Map and has great access to transit. Located between West Towne Mall and the University Research Park, the site is located central to various employment opportunities for individuals at all income levels. With historically primarily retail and office uses, the Odana Area Plan calls for additional housing units to create a more vibrant community. The established retail and office uses make a great existing support for affordable housing along with the schools located very close to the site. Although one of our other developments, Normandy Square Apartments, is within 0.5 miles of the site, Normandy is independent senior living and Yellowstone Apartments will be general occupancy, so we will serve two completely distinct low to moderate income groups in this area.

Yellowstone Apartments received an allocation of WHEDA Low-Income Housing Tax Credits (LIHTC) in May of 2023 so this eliminates the risk of the County allocating finite funding resources to a project that does not ultimately receive tax credits. The Dane County Affordable Housing Development Funds are a final and critical funding source needed to make this project feasible. If Yellowstone Apartments is awarded Dane County Affordable Housing Development Funds, this project will break ground in early 2024 with units delivered in 2025.

This proposal will provide a 60-unit family building with a combination of 51 affordable units and 9 market rate units. Twelve (12) of the affordable units will further be set aside for individuals/families at the 30% CMI rent and income levels.

Our proposal at 426 South Yellowstone Drive offers the following additional AHDF 2023 preferences:

- Project commitment to 40 years of affordability.
- Range of one-bedroom, two bedroom, and three-bedroom units spread across income levels will be offered to serve the varying needs of individuals/families. The unit mix includes 10 three-bedroom units, all of which are affordable units.

- Integrated supportive services will be provided through the Salvation Army and the Dane County Veterans Service Office.
- Working with the Dane County Homeless Services Consortium (HSC) to fill all 12 our 30% CMI set-aside units.
- Neighborhood enhancing first floor space, Anesis Therapy, a black-owned mental health outpatient clinic.
- Located in a well-established neighborhood and in close proximity to jobs, transit, schools, and other key amenities.
- Generous tenant screening criteria.
- Incorporating all of the flexible tenant screening criteria for all of our 30% CMI units.
- Incorporating 7 of the Fair Tenant Selection Criteria for all other units.
- Incorporating the Denial Process.
- Incorporating the Tenancy Addendum.
- Leveraging the use of all available resources by already having previously secured WHEDA tax credits, applying for City of Madison and Dane County Affordable Housing Funds, and deferment of the maximum feasible amount of developer fee.

We are a long-term owner with a proven ability to secure the necessary sources of funding along with the construction expertise to manage complicated projects across the finish line that continue to add to our 32-year history of exceptional affordable housing developments in the communities in which we work.

We look forward to working with Dane County staff to bring this project to fruition.

Sincerely,

Mark Hammond

Mark Hammond
Vice President of Development

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1a. Application Form

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](#).

APPLICATION SUMMARY

ORGANIZATION NAME	MSP Real Estate, Inc.	
MAILING ADDRESS If P.O. Box, include Street Address on second line	7901 West National Avenue West Allis, WI 53214	
TELEPHONE	952-351-4540	LEGAL STATUS
FAX NUMBER	952-935-7202	<input type="checkbox"/> Private, Non-Profit
NAME CHIEF ADMIN/ CONTACT	Mark Hammond	<input checked="" type="checkbox"/> Private, For Profit
INTERNET WEBSITE (if applicable)	https://msprealestateinc.com/	<input type="checkbox"/> Other: LLC, LLP, Sole Proprietor
E-MAIL ADDRESS	mhammond@msphousing.com	Federal EIN: <u>41-1630478</u> Unique Entity Identifier (UEI): 60-670-9434

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

PROJECT NAME	PROJECT CONTACT PERSON	PHONE NUMBER	E-MAIL
Yellowstone Apartments	Mark Hammond	612-868-9997	mhammond@mpshousing.com

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

TOTAL PROJECT COST	AMOUNT OF AHDF FUNDS REQUESTED	PERCENT OF AHDF FUNDS TO TOTAL PROJECT COST
\$19,908,009	\$1,500,000	7.5%



Signature of Chief Elected Official/Organization Head

Mark Hammond

Vice President of Development
Title

7/21/2023

Printed Name

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:	Yellowstone Apartments
Project Address:	426 South Yellowstone Drive
City, State, Zip:	Madison, WI 53719
Parcel Number:	070825202131
Census Tract:	4.08

- 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.

Yellowstone Apartments will be located at 426 South Yellowstone Drive in the City of Madison, WI. This site is located in the Odana Area in Aldermanic District 19.

We held an initial meeting with City staff from the Community Development Division (CDD), Planning Division, and Zoning. The City staff was supportive of this project as it has great access to employment opportunities for individuals at all income levels. Located in the Odana Area between the University Research Park and West Towne Mall, various employment opportunities are available. Especially as the site is located in a "Preferred Transit Oriented Development Area" on the City of Madison 2023 Affordable Housing Targeted Area Map and will be located along the future Bus Rapid Transit (BRT) Route, they were supportive of the proposed project and location. Their comments were mainly directed toward the density allowed on the site, which these comments were addressed to receive our conditional use approval.

We met with Alder Kristen Slack prior to our neighborhood meeting. Alder Slack encouraged us to consider our parking ratios and energy efficiency strategies. Overall Alder Slack was supportive of the development. We held a virtual neighborhood meeting on April 27, 2023. The neighborhood was also supportive of the proposed development overall. Some neighbors raised concerns regarding parking. We discussed our process in deriving parking counts based on similar area projects.

- 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.

We are applying to the City of Madison's Affordable Housing Fund concurrent with this Dane County Affordable Housing Development Fund application. The deadline for the City's application is August 15, 2023 with notification of awards in December 2023. The park impact fees will also be waived for the affordable units.

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

Yes, this project is eligible for municipal affordable housing resources. The project site is actually located in a "Preferred Transit Oriented Development Area" on the City of Madison 2023 Affordable Housing Targeted Area Map, which means it is in a preferred area to receive funding.



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 subject property is zoned Suburban Employment (SE) within the Transit-Oriented Development (TOD) District and is zoned appropriately to accommodate the proposed project. The project has also already received conditional use approval. A demolition permit and building permit will need to be obtained prior to construction.

During the process of receiving conditional use approval, the project was found to be consistent with all relevant adopted plans. Several key points of alignment are illustrated below.

The City of Madison Comprehensive Plan (adopted 2018) emphasizes the need for Madison to have a range of quality affordable housing located throughout the City. Feedback from the community also addresses this high need for quality affordable housing, especially for developments located near amenities and transit to allow residents to save on transportation costs and have greater opportunities for jobs. The plan encourages integrating affordable housing into neighborhoods for greater support and chances of success. The plan also states "Integration of affordable housing into mixed-use areas is encouraged, especially along major transit corridors. Multifamily residential within the mixed-use category should contain a mixture of unit sizes, including three bedroom (or larger) units" (Page 22).

Yellowstone Apartments is consistent with the above recommendations from the Comprehensive Plan. Located along Mineral Point Road, the site takes advantage of a major transit corridor and the future BRT route. As such, the site has great access to area amenities and transit. The Odana Area is already quite established with various office and retail uses. Integrating affordable housing into this area, especially with great transit access, provides plentiful employment opportunities and access to amenities/services for future residents which will provide additional support for the development's success. Yellowstone Apartments also incorporates a mixed-use element with commercial space on the first floor and will offer a range of unit sizes from one to three bedrooms to provide opportunities for individuals/families in the community with varying needs.

As noted in the Odana Area Plan, heavy single-use retail and single-use office space along with large parking lots have historically been developed in this area. The plan recognizes a need for more residential development, including affordable and/or rental housing, along with mixed-use development to transition this area to a pedestrian-friendly, vibrant community (Pages 1-2). The plan also recommends to "support affordable housing of all types, including different sizes, costs, and income levels for a broad range of residents" (Page 23). There are numerous references to the utilization of the City of Madison's Affordable Housing Fund (AHF) to address the high need for additional affordable units. Overall, "The ultimate goal of this plan is to unlock the area's significant development potential and guide the transition and redevelopment of predominantly commercial areas into mixed use Activity Centers" (Page 2).

By integrating a mixed-income, mixed-use housing development into the Odana Area, Yellowstone Apartments is also in alignment with the Odana Area Plan to address the need for more residential development in order to transform the area into a more pedestrian-friendly, vibrant, and mixed-use community. As previously mentioned, Yellowstone Apartments is also located in a "Preferred Transit Oriented Development Area" on the City of Madison 2023 Affordable Housing Fund Targeted Area Map furthering the City's goals of where they would like to see and help fund affordable housing development.

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

Yellowstone Apartments as proposed is a 60-unit family project that contains 51 (85%) of affordable housing at or below 60% CMI with a commitment to 40 years of affordability. Twelve (12) of these affordable units will be further segmented for individuals and families at the 30% CMI limit. Supportive services will be integrated with The Salvation Army of Dane County and Dane County Veterans Service Office for the 30% CMI units. A mix of one, two, and three-bedroom units spread across income levels will be offered in order to serve the varying needs of individuals and families in the community. This includes 10 three-bedroom units (16.7% of total units), all of which are affordable units. Unit sizes range from roughly 680 sf for one-bedroom units to 1,399 sf for three-bedroom units. The building will consist of five stories of residential units and one level of residential units/structured parking. The site is on a slope so essentially half of the ground floor will be exposed to Grand Teton Plaza and South Yellowstone Drive which is where the residential units and commercial space will be located, and half of the ground floor will not be exposed which is where the structured parking will be located. The approximately 650 sf commercial space on the ground floor will be operated by Anesis Therapy, a black-owned mental health outpatient clinic. The development will also feature a top floor community room and outdoor terrace along with a ground floor fitness center, indoor play room, on-site leasing office, and outdoor courtyard and tot lot.

This new construction project will be located in the Odana Area at 426 South Yellowstone Drive, Madison, WI within a "Preferred Transit Oriented Development Area" on the City of Madison 2023 Affordable Housing Targeted Area Map. With it's location between Mineral Point Road and Odana Road, the site is well-served by transit and is located in close proximity to many services/amenities. Various schools are located just across the street, and the site is located central to many employment opportunities at every income level as the site is located between both West Towne Mall and the University Research Park. Yellowstone Apartments will also take advantage of the future BRT route that will run along Mineral Point Road.

Yellowstone Apartments will provide much needed affordable housing in the City of Madison in a location that has especially great access to transit, education, and employment opportunities. Yellowstone Apartments will contribute to the County's and City's goals of providing more options for affordable housing in locations well served by services/amenities and access to transit.

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

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

<input type="checkbox"/>	2020 Enterprise Green Communities Certification
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Please note that we have committed to achieving the WI Green Built Gold Standard certification as part of our WHEDA application. This was a new program for last year's WHEDA application. As part of this program, we will achieve the ENERGY STAR Multifamily New Construction certification and either the EPA Indoor airPLUS certification or 10 points under the "Air Quality" section of the WI Green Built Gold Standard checklist, which is considered an equivalent to EPA Indoor airPLUS under the WI Green Built Gold Standard. We hereby commit to proceed with ENERGY STAR Multifamily New Construction and either EPA Indoor airPLUS or scoring 10 points under the "Air Quality" section of the WI Green Built Gold Standard checklist needed as a substitute to EPA Indoor airPLUS as part of the WI Green Built Gold Standard.

<input checked="" type="checkbox"/>	ENERGY STAR Multifamily New Construction and EPA Indoor airPLUS
<input type="checkbox"/>	2020 Enterprise Green Communities Certification Plus
<input type="checkbox"/>	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
01/27/2023	Apply for WHEDA 9% LIHTC Credits
05/05/2023	WHEDA Award Notification
11/01/2023	Bid Package Released
12/01/2023	Complete Equity & Debt Financing
12/31/2023	Bids Awarded
12/31/2023	Acquisition/Real Estate Closing
02/01/2024	New Construction Start
02/01/2025	Begin Lease-Up/Marketing
07/31/2025	New Construction Completion
07/31/2025	Certificate of Occupancy Obtained
12/31/2025	Complete Lease-Up

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:		426 South Yellowstone Drive, Madison, WI 53719					Projected Monthly Unit, including Utilities				
% of County Median Income (CMI)	Total # of Units	# of Bedrooms					\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
		# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs					
≤30%	12		8	2	2		\$687	\$824	\$952		
40%											
50%	24		13	4	7		\$1,145	\$1,373	\$1,587		
60%	15		2	12	1		\$1,237	\$1,483	\$1,715		
80%											
Affordable Sub total	51										
Market	9		2	7			\$1,350	\$1,390-\$1,890			
Total Units	60		25	25	10		Notes:				

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

ADDRESS #2:		# of Bedrooms					Projected Monthly Unit, including Utilities				
% of County Median Income (CMI)	Total # of Units	# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs	\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs

40%											
50%											
60%											
80%											
Affordable Sub total											
Market											
Total Units								Notes:			

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

J. SITE AMENITIES: Check all that apply.

<input type="checkbox"/>	Community Building, square feet:
<input checked="" type="checkbox"/>	Community Room, square feet: 870
<input type="checkbox"/>	Garages, number: _____ and monthly rent:
<input checked="" type="checkbox"/>	Surface parking, number: 8 and monthly rent: \$0
<input checked="" type="checkbox"/>	Underground parking, number 33 and monthly rent: \$75

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

Outdoor common amenities include private balconies/patios for each unit, an outdoor courtyard, and a tot lot.

Indoor common amenities include a top floor community room, fitness center, indoor play room for kids, tenant storage, underground parking, and an on-site property manager that will have a leasing office to assist residents at the property. There will be no smoking in the building.

Unit amenities will feature vinyl plank flooring in the kitchen and living room with carpet in the bedrooms. Each unit will have its own washer and dryer at no additional charge. All units will include granite countertops and a stainless steel refrigerator, dishwasher, range, and microwave. The building will offer free basic internet connection to all residents.

A commercial unit will also be located on the ground floor. MSP Real Estate has a signed MOU with Anesis Therapy, a black-owned mental health outpatient clinic, to lease the approximately 650 sf commercial space. Anesis Therapy's mission is "Helping people navigate the mental health and wellness aspects of their life in a way that honors culture, family, community, and faith." Services offered include mental health, substance abuse, and case management services to individuals, couples, families, children, and adolescents. Anesis Therapy also has a diverse staff that specializes in many areas and can offer services in English, Spanish, and Hmong. Fees charged for services provided in the facility will be affordable to persons at or below the 60% income level with a sliding scale fee schedule, which has fees starting at \$5 per visit for the lowest income residents.

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.

Yellowstone Apartments will be located in the Odana Area. With its location between Mineral Point Road and Odana Road, the site is well-served by transit and is located in close proximity to many services/amenities as can be seen in the below chart. It is also located central to many employment opportunities at every income level as the site is located between both West Towne Mall and the University Research Park. Yellowstone Apartments will also take advantage of the future BRT route that will run along Mineral Point Road.

Schools assigned to the address of the site include Muir Elementary, Gillespie Middle, and Memorial High. A great benefit of this site is that each of these schools are within 0.65 miles of the site (a 20 minute walk or 5 minute bike) allowing kids to get easily to and from school without a vehicle. Walking/biking is the most efficient route to these schools as they are so close by. Several childcare centers are also located in close proximity to the site as can be seen below. The closest public library is the Madison Public Library - Alicia Ashman just 1.74 miles away.

Both the UW Health West Towne Clinic and UW Health Odana Road Clinic along with various pharmacies as can be seen below are located in close proximity to the site, allowing future residents to stay on top of their medical/health needs.

Several full service grocery stores and retail are located near to the site as well. This allows residents to shop for everyday needs and services as well as provides additional employment opportunities for residents. For recreational and social purposes, there are several parks and community centers located within 1.5 miles of the site.

Transit routes will offer residents easy and quick access to transportation in all directions of the City, allowing residents to easily navigate to employment opportunities, services, and amenities, especially if they do not have their own personal vehicle. Bus Routes A, H, & J all have bus stops within 0.5 miles of the site. All routes provide consistent weekday and weekend service. Route A travels from West Towne Mall to the Sun Prairie Park & Ride, Route H travels from West Towne Mall to the South Transfer Point, and Route J travels from West Towne Mall to the UW Campus. The Yellowstone Apartments site is also located within 0.92 miles of the west transfer point and is located along the future BRT route on Mineral Point Road. With a 72 Walk Score as "Very Walkable" and a 61 Bike Score as "Bikeable," both walking and biking are viable options to get around.

As can be seen from the list of amenities below, many services and amenities are located in close proximity to the site, allowing residents to save money on transportation costs. In addition, the transit routes and future BRT route will further allow residents to access the surrounding amenities/services. The project will also be providing underground parking, but with this location the residents will not need to rely on a personal vehicle to get around the neighborhood and City.

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

Type of Amenities & Services	Name of Facility	Distance from Site
Full Service Grocery Store	Gordon Food Service Store	0.26 mi
	Woodman's Food Market	0.83 mi
	Metcalfe's Market	0.95 mi
	Hy-Vee	1.20 mi

Public Elementary School	John Muir Elementary School Stephens Elementary School Crestwood Elementary School Milele Chikasa Anana Elementary School	0.65 mi 0.83 mi 1.27 mi 1.29 mi
Public Middle School	Gillespie (previously Thomas Jefferson) Middle School Hamilton Middle School	0.65 mi 1.75 mi
Public High School	Vel Phillips Memorial (previously Madison Memorial) High School Capital High Westside	0.55 mi 0.66 mi
Job-Training Facility, Community College, or Continuing Education Programs	UW School of Nursing Edgewood College	3.47 mi 3.49 mi
Childcare	Hilde L Mosse Gan Hayered Preschool Koala T Kare Child Care Cultured Kids West University Houses Preschool Inc Gotitas De Amor Bilingual Child Care	0.11 mi 0.26 mi 0.44 mi 0.53 mi 0.59 mi
Public Library	Madison Public Library - Alicia Ashman Madison Public Library - Meadowridge	1.74 mi 1.95 mi
Neighborhood, Community, or Senior Center	Lussier Community Education Center MSCR Odana Lussier Family West YMCA Elver Park Neighborhood Center Theresa Terrace Neighborhood Center	0.70 mi 0.95 mi 1.19 mi 1.40 mi 1.48 mi
Full Service Medical Clinic or Hospital	UW Health West Towne Clinic UW Health Odana Road Clinic	0.69 mi 0.89 mi
Pharmacy	CVS Pharmacy UW Health West Towne Clinic Pharmacy Walmart Pharmacy Walgreens Pharmacy Walgreens Pharmacy	0.27 mi 0.69 mi 0.96 mi 1.00 mi 1.30 mi
Public Park or Hiking/Biking Trails	Nautilus Point Park Mineral Point Park Owen Conservation Park Garner Park Everglade Park Norman Clayton Park Walnut Grove Park Glen Oak Hills Park Bordner Park High Point Park Sherwood Forest Park Haen Family Park Hammersley Park Sunridge Park Greentree - Chapel Hills Park	0.30 mi 0.45 mi 0.82 mi 0.85 mi 1.05 mi 1.05 mi 1.12 mi 1.15 mi 1.20 mi 1.25 mi 1.25 mi 1.28 mi 1.33 mi 1.37 mi 1.38 mi

	Odana Hills Park	1.47 mi
	Orchard Ridge Valley Park	1.48 mi
	Slater (William) Park	1.48 mi
	Woodland Hills Park	1.50 mi
Banking	Summit Credit Union	0.11 mi
	Great Midwest Bank	0.25 mi
	Wells Fargo Bank	0.50 mi
	US Bank	0.50 mi
	Heartland Credit Union	0.66 mi
	Old National Bank	0.76 mi
	First Business Bank	0.78 mi
	Bankers' Bank	1.19 mi
	Associated Bank	1.26 mi
	BMO Harris Bank	1.30 mi
Retail	Market Square Shopping Center	0.20 mi
	Various Retail Along Odana Road	0.34 mi
	West Towne Mall	0.64 mi
	West Towne Crossing	0.97 mi
	Walmart	0.97 mi
	TJ Max/Five Below/Etc.	1.02 mi
Other (list the amenities)	University Research Park	0.75 mi
	Westside Community Market	0.75 mi
	West Transfer Point	0.92 mi

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.

As the Odana Area Plan recognizes, the Odana Area has historically been made up of various retail and office uses. As such, this area provides a lot of employment opportunities for individuals at every income level situated right between West Towne Mall and the University Research Park.

West Towne Mall is about an 18 minute walk, 7 minute bike, or 12 minute bus ride from the site. There are various other retail/office opportunities between the site and West Towne Mall along Odana Road and Mineral Point Road that would be an even shorter distance for residents. Prairie Towne Center is also just outside 1.5 miles of the site and is a direct 20 minute bus ride along Mineral Point Road. University Research Park is also just a 25 minute walk from the site for residents who may work there.

Individual bus fares are \$2.00/adult, \$1.25/youth and \$1.00/senior or disabled. Children under the age of 5 with a chaperone are free. Thirty-one (31) day passes are also offered at \$65/adult, \$32.50/senior or disabled, and \$28/low-income. Qualified Veterans are also eligible for free monthly bus passes through the Dane County Veterans Service Office.

This site will also be located along the future Bus Rapid Transit (BRT) route in the City of Madison, which is why the site is located in a "Preferred Transit Oriented Development Area" on the City of Madison 2023 Affordable Housing Targeted Area Map. Not only will this expand the access to opportunities throughout the City, but it will also make getting to and from the site faster and easier.

As can be seen from the list of amenities, many services and amenities are located in close proximity to the site, allowing residents to save money on transportation costs. In addition, the transit routes and future BRT route will further allow residents

to access the surrounding amenities/services. The project will also be providing underground parking, but with this location the residents will not need to rely on a personal vehicle to get around the neighborhood and City.

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.

Collaborative referral based supportive service partnerships will be established with The Salvation Army of Dane County and Dane County Veterans Service Office.

1. The Salvation Army of Dane County (weekly on-site intensive case management will be provided for all referrals by the Salvation Army, Support Letter attached as exhibit 5&6.a): The Salvation Army will refer individuals and families that it provides assistance to under programs called Dane County Assists With New Starts (DAWNS) and RISE. Individuals and families transitioning from homelessness to housing can be offered a rapid rehousing package through the DAWNS and RISE programs. This rapid rehousing 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 the 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 the DAWNS and RISE programs to individuals/families that it refers to live at Yellowstone Apartments.

2. Dane County Veterans Service Office (referral, MOU attached as exhibit 5&6.b): This is the County agency responsible for assisting veterans in accessing benefits and referring them to resources in the community, including affordable housing. Therefore, MSP Property Management marketing and outreach efforts for veterans will be coordinated with the Dane County Veterans Service Office. The Dane County Veterans Service Office assists Veterans who may need supportive services and are eligible for veteran specific services to identify where to obtain those services from a range of providers who are primarily funded by the U.S. Department of Veterans Affairs. MSP Property Management will establish a working relationship with the Dane County Veterans Service Office locally and will work with them and their contracted service providers and tenants to address any issues that may arise that could affect their success in maintaining their tenancy.

In addition to the two supportive service partnerships above, MSP Real Estate has a signed MOU with Anesis Therapy, a black-owned mental health outpatient clinic, to lease the approximately 750 sf of commercial space on the ground floor. Anesis Therapy's mission is "Helping people navigate the mental health and wellness aspects of their life in a way that honors culture, family, community, and faith." Services offered include mental health, substance abuse, and case management services to individuals, couple, families, children, and adolescents. Anesis Therapy also has a diverse staff that specializes in many areas and can offer services in English, Spanish, and Hmong. Fees charged for services provided in the facility will be affordable to persons at or

below the 60% income level with a sliding scale fee schedule, which has fees starting at \$5 per visit for the lowest income residents.

- O. **PARTNERING TO END HOMELESSNESS:** In the space below, indicate the project’s willingness to partner with Homeless Services Consortium member agencies and to end homelessness for individuals and /or families by providing a 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.

We will work with the Homeless Services Consortium to fill all 12 of our 30% set aside units as follows:

The project will partner with the Homeless Services Consortium for 5 units set aside for The Salvation Army of Dane County. These 5 units will be set aside for direct referral by The Salvation Army of Dane County through the DAWNS and RISE programs. Individuals and families transitioning from homelessness to housing can be offered a rapid rehousing package through the DAWNS and RISE programs. These referrals will come from the community by-name list that is managed by the Coordinated Entry Systems Manager of the Homeless Services Consortium of Dane County. The project will also partner with the Homeless Services Consortium on 7 units set aside for the Dane County Veterans Service Office.

We will need to work to identify individuals and families meeting multiple preferences to the extent feasible. For example, we will work with Coordinated Entry Systems Manager of the HSC along with our referral partners to identify individuals and/or families on the community by-name list that meet the project's other preferences (including individuals with special needs, disabling conditions, homeless/nearly homeless, and veterans) to fill the project's 30% units.

If our identified ranges of supportive service units (30% units) are not filled with the targeted supportive housing populations specified, MSP will additionally go above and beyond these requirements by working with other agencies and organizations to identify individuals and families from the community wide priority list for at least a portion of the remaining available units if required to fill those supportive units.

In addition, the project aims to forward the goal of ending homelessness by offering 12 units at the 30% CMI rent and income level having integrated supportive services through The Salvation Army of Dane County and the Dane County Veterans Service Office. The project will also apply a majority of the Fair Tenant Selection Criteria below along with applying the Denial Process and Tenancy Addendum listed below.

Total # of Project Units	# of Units Targeted to Individuals/Families on HSC community by-name list	% of Units Targeted to Individuals/Families on HSC community by name list
51 Affordable Units 60 Total Units	12 Units 12 Units	24% 20%
**Since funding is tied to affordable units only, and all of our affordable units		

<p>are at 60% or lower, it would be unfair to penalize this project for having more than the typical % of market rate units. Indeed, the higher % of market rate units helps enhance the social and economic benefits of having affordable housing units integrated with market rate units.</p>		
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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).

Six months before we would have initial outreach. We'd have applications start to be submitted 120 days before occupancy with tenant screening ongoing until occupancy/tenant move in. Our property management team will work closely with the case managers and applicants to address any questions throughout the application and ensure all applicable documents are provided for the application process to go as smoothly as possible.

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
<input checked="" type="checkbox"/>	<input type="checkbox"/>

- | |
|--|
| <ul style="list-style-type: none"> • Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months |
| <ul style="list-style-type: none"> • Lack of housing history |
| <ul style="list-style-type: none"> • Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located. |
| <ul style="list-style-type: none"> • Credit score |
| <ul style="list-style-type: none"> • Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations. |
| <ul style="list-style-type: none"> • Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water). |
| <ul style="list-style-type: none"> • 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. |
| <ul style="list-style-type: none"> • 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 |

<ul style="list-style-type: none"> • repayment of the obligation; 2) signs up for automatic payment of rent to the housing provider; or (3) obtains a representative payee.
<ul style="list-style-type: none"> • Wisconsin Circuit Court Access records;
<ul style="list-style-type: none"> • 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.

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

	Yes	No	
Required for funding	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Lack of housing history
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located.
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Credit score
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations.
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water).
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Owing money to a prior landlord or negative rent payment history if the tenant’s housing and utility costs were more than 50% of their monthly income.
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Owing money to a prior landlord or negative rent or utility payment history if applicant does one of the following: (1) establishes a regular record of repayment of the obligation; 2) signs up for automatic payment of rent to the housing provider; or (3) obtains a representative payee.
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Wisconsin Circuit Court Access records;
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criminal activity, except: (i) a criminal conviction within the last two years for violent criminal activity or drug related criminal activity resulting in a criminal conviction, and (ii) if the program or project is federally assisted, criminal activity for which federal law currently requires denial. (<i>Violent criminal activity</i> is defined in 24 C.F.R § 5.100 and means any criminal activity that has as one of its elements the use, attempted use, or threatened use of physical force substantial enough to cause, or be reasonably likely to cause, serious bodily injury or property damage. “Drug related criminal activity is defined in Wis. Stat. s. 704.17(3m)(a)(2). “Drug-related criminal activity” means criminal activity that involves the manufacture or distribution of a controlled substance. “Drug-related criminal activity” does not include the manufacture, possession, or use of a controlled substance that is prescribed by a physician for the use of by a disabled person, as defined in s. 100.264(1)(a), and manufactured by, used, by or in the possession of the disabled person or in the possession of the disabled person’s personal care worker or other caregiver.)

Will the project incorporate the denial process detailed below?

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

	Prior to a denial based on a criminal record, the housing provider shall provide the applicant access to a copy of the criminal record at least five days prior to the in-person appeal meeting and an opportunity to dispute the accuracy and relevance of the report, which is already required of HUD assisted housing providers. See 24 C.F.R. § 982.553(d), which applies to public housing agencies administering the section 8 rent assistance program.
1.	Prior to a denial based on a criminal record, the housing provider shall provide the applicant the opportunity to exclude the culpable family member as a condition of admission of the remaining family members.
2.	Prior to a denial decision, the housing provider is encouraged to meet with the applicant to review their application and make an individualized determination of their eligibility, considering: (a) factors identified in the provider's own screening policies, (b) if applicable, federal regulations, and (c) whether the applicant has a disability that relates to concerns with their eligibility and an exception to the admissions rules, policies, practices, and services is necessary as a reasonable accommodation of the applicant's disability. In making a denial decision, the housing provider shall consider all relevant circumstances such as the seriousness of the case, the extent of participation or culpability of individual family members, mitigating circumstances related to the disability of a family member, and the effects of denial on other family members who were not involved in the action or failure.
3.	The property manager will base any denial on sufficient evidence. An arrest record or police incident report is not sufficient evidence. Uncorroborated hearsay is not sufficient evidence.
4.	Denial notices shall include the following: a) The reason for denial with details sufficient for the applicant to prepare a defense, including: i) The action or inaction forming the basis for the denial, ii) Who participated in the action or inaction, iii) When the action or inaction was committed, and iv) The source(s) of information relied upon for the action or inaction. b) Notice of the applicant's right to a copy of their application file, which shall include all evidence upon which the denial decision was based. c) Notice of the applicant's right to copies of the property manager's screening criteria. d) Notice of the right to request an in-person appeal meeting on the denial decision by making a written request for a hearing within 45 days. The housing provider is not required to hold the unit open while the appeal is pending. e) Notice of the right to have an advocate present at the in-person appeal meeting and of the right to be represented by an attorney or other representative. f) Notice of the right to present evidence in support of their application, including, but not limited to evidence related to the applicant's completion or participation in a rehabilitation program, behavioral health treatment, or other supportive services.

5.	If the applicant requests an in-person appeal meeting, the hearing will be conducted by a person who was not involved in or consulted in making the decision to deny the application nor a subordinate of such a person so involved.
6.	The in-person appeal meeting shall be scheduled within ten working days of the request, unless the applicant requests a later date.
7.	A written decision on the application shall be provided to the applicant within ten working days after the in-person appeal meeting.

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

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

a.	Security Deposits. The amount of a security deposit shall not be more than one month's rent.
b.	Late Fees and Other Fees. Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent. 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.	Rights of Youth to Access Common Spaces. Youth under the age of 18 are allow to use and enjoy common areas without supervision. This does not preclude reasonable rules in ensure the safety of children and youth.
d.	Good Cause for Termination. A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined in include the following: (i) a serious violation of the lease; (ii) repeated minor violations of the lease; or (iii) a refusal to re-certify program eligibility. Repeated means a pattern of minor violations, not isolated incidents. Termination notices and procedures shall comply with Chapter 704 of Wisconsin Statutes and federal law, when applicable. Written notice is required for non-renewal and shall include the specific grounds for non-renewal and the right of the tenant to request a meeting to discuss the non-renewal with the landlord or landlord's property management agent within fourteen (14) days of the notice. If requested, the landlord or property management agent will meet with the tenant to discuss the non-renewal, allow the tenant to respond to the alleged grounds for non-renewal, and pursue a mutually acceptable resolution.
e.	<p>Reasonable Guest Rules. Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not limited to the following: (1) Prior authorization of guests by the property management, unless the guest is staying for an extended period of time (e.g. more than 2 weeks); (2) Prohibition on overnight guests; (3) Requiring that the resident be with the guest at all times on the property. (4) Requiring guests to show ID unless requested by the tenant. (5) Subjecting caregivers, whether caring for a child or children, or an adult with disabilities, to limitations on the number of days for guests.</p> <p>Landlord may ban a person who is not a tenant from the rental premises if the person has committed violent criminal activity or drug related criminal activity at rental premises. No person shall be banned from the rental premises without the consent of the tenant unless the following have taken place:</p> <p>(1) A notice of the ban is issued to the tenant stating the:</p> <p>(a) name of the person banned,</p> <p>(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</p>

	<p>(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.</p> <p>(2) If requested, a hearing on the ban has taken place to provide the tenant an opportunity to dispute the proposed ban, discuss alternatives of the ban, and address any unintended consequences of the proposed ban.</p> <p>A tenant may not invite or allow a banned person as a guest on the premises, provided the Landlord has followed the proper procedure and given notice to Tenant as set forth herein.</p> <p>A tenant who violates the guest policy may be given a written warning detailing the facts of the alleged violation. The written warning shall detail the violation, and warn the tenant that repeated violations may result in termination of tenancy. Tenants that repeatedly violate the guest policy, (e.g. three (3) or more violations within a twelve (12) month period) may be issued a notice of termination in accordance with state and federal law.</p> <p>Nothing in this policy limits a person's right to pursue a civil order for protection against another individual.</p>
<p>f.</p>	<p>Parking Policies. Parking policies and practices must comply with applicable laws. Vehicles shall not be towed to a location that is more than 6 miles from the rental premises, unless there is not a towing company with a tow location available within 6 miles.</p>

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.

<p>Name of Supportive Services Partner, and number of staff dedicated to project:</p>	<p>Yellowstone Apartments will include 12 (20%) Integrated Supportive Housing units at the 30% CMI income & rent level.</p> <p>Twelve (12) units at the 30% CMI will have integrated supportive services provided by outside agencies with case management services available.</p> <ul style="list-style-type: none"> - 5 units for homeless/risk of homeless and/or individuals with disabilities (The Salvation Army of Dane County). - 7 units for Veterans and/or individuals with disabilities and/or experiencing homelessness (Dane County Veterans Service Office). - We will work with the Homeless Services Consortium (HSC) to fill all 12 of our 30% set aside units as mentioned above in Question O. <p>The Salvation Army of Dane County - The Salvation Army would not have specific staff dedicated to the partnership, but would use their existing staff to provide supportive case management services as already provided for under the DAWNS and RISE programs.</p> <p>Dane County Veterans Service Office (CVSO) - CVSO would not have specific staff dedicated to the partnership, but would use their existing staff to help connect residents to services and resources.</p> <p>In addition to the above supportive service partners, MSP Real Estate has a signed MOU with Anesis Therapy, a black-owned mental health outpatient clinic, to lease the approximately 650 sf commercial space on the ground floor. Services will be available to all residents and community members with fees starting at \$5 for the lowest income residents. Staffing will be managed by Anesis Therapy to meet the needs at this service location.</p>
<p>Scope of Services provided to tenants and approaches supportive service partner will use to address needs of tenant population:</p>	<p>The Salvation Army of Dane County - Individuals and families transitioning from homelessness to housing can be offered a rapid rehousing package through the DAWNS and RISE programs. This rapid rehousing 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 the RISE program. Additional rental assistance may be granted on an individual case by case basis. Case management support can last up to two years.</p>

	<p>Dane County Veterans Service Office (CVSO) - CVSO is the County agency responsible for assisting veterans in accessing benefits and referring them to resources in the community, including affordable housing. Therefore, MSP Property Management marketing and outreach efforts for Veterans will be coordinated with CVSO. CVSO assists Veterans who may need supportive services and are eligible for veteran specific services to identify where to obtain those services from a range of providers who are primarily funded by the U.S. Department of Veterans Affairs. MSP Property Management will establish a working relationship with CVSO locally and will work with them and their contracted service providers and tenants to address any issues that may arise that could affect their success in maintaining their tenancy.</p> <p>Anesis Therapy - Anesis Therapy's mission is "Helping people navigate the mental health and wellness aspects of their life in a way that honors culture, family community, and faith." Services offered include mental health, substance abuse, and case management services to individuals, couples, families, children, and adolescents. Anesis Therapy also has a diverse staff that specializes in many areas and can offer services in English, Spanish, and Hmong. Fees charged for services provided will be affordable to persons at or below the 60% income level with a sliding scale fee schedule, which has fees starting at \$5 per visit for the lowest income residents. In addition to these discounted rates and quality service, clients are entitled to financial counseling by someone who can understand and offer possible solutions for those who cannot pay in full. The Patients Account Representative's role is that of a patient advocate who works with the patient and/or guarantor to find reasonable payment alternatives.</p>
<p>Where tenants will access services. For examples will services be on-site at development in designated space or by referral to off-site community supports:</p>	<p>The Salvation Army of Dane County - The Salvation Army can provide on-site support in a designated space, the residents' apartments, or The Salvation Army offices located at 630 East Washington Avenue, Madison, WI.</p> <p>Dane County Veterans Service Office (CVSO) - CVSO or their related service partners can provide on-site support in a designated space, the residents' apartments, at the CVSO office in the City-County Building at 210 Martin Luther King Jr. Blvd, or at their related service partners' offices.</p> <p>Anesis Therapy - Services will be provided in the approximately 650 sf commercial space on the ground floor of the building. The Market Study for Yellowstone Apartments notes that "considering the health and demographic data we have provided above, we believe the subject's location is well-situated within an area that is in need of a Community Service Facility providing mental</p>

	<p>health, substance abuse, and case management services." Due to trauma caused by the chronic stress of poverty and the barriers and challenges that poverty can create, many children, youth, and adult participants benefit from a support mechanism provided at a service location where they feel safe, connected, and supported.</p>
<p>If services provided are referral to off-site community supports, please detail how tenants will receive information on supportive services that are available to them before and after needs arise:</p>	<p>The Salvation Army of Dane County - Tenants will receive information about all of The Salvation Army's programs and how to access them through fliers at the on-site property management office or other designated area, social media, and community outreach.</p> <p>Dane County Veterans Service Office (CVSO) - Tenants will receive information about all of CVSO's programs and how to access them through fliers at the onsite property management office or other designated area, social media, and community outreach.</p> <p>Anesis Therapy - Services will be provided in the approximately 650 sf commercial space of the ground floor of the building where residents and community members can access further information. Marketing materials will also be located in the project's tenant resource area.</p>
<p>The frequency of services provided and/or a proposed schedule of when services are available to tenants:</p>	<p>The Salvation Army of Dane County - Generally services are Monday-Friday 8:30am-5:00pm. Case managers typically meet with residents once a week.</p> <p>Dane County Veterans Service Office (CVSO) - CVSO's hours of operation are generally Monday-Friday 7:45am-4:30pm. Services to be provided will be coordinated through CVSO on as-needed basis.</p> <p>Anesis Therapy - Hours of operation have not yet been finalized, but it is anticipated that services will be available during regular business hours. Anesis Therapy also has an after hours support line for clients.</p>
<p>How will the supportive services partner identify and collaborate with other community service providers in the target area:</p>	<p>Supportive services partners have established relationships in the community that they will collaborate with as appropriate.</p>
<p>How the supportive services partnership will be funded, including if the respondent is providing funding to support the partnership:</p>	<p>The Salvation Army of Dane County - The majority of Salvation Army supportive services are funded by Dane County, United Way, and other government donations and fundraising donations. The DAWNS program is funded by Dane County and the RISE program is HUD funded. There is no direct financial support for supportive services coming from the operational budget for Yellowstone Apartments.</p> <p>Dane County Veterans Service Office (CVSO) - CVSO funds its veterans case management through the Dane County operating budget. Many partnering</p>

<p>providers and services identified through the CVSO are funded by the U.S. Department of Veterans Affairs. There is no direct financial support for supportive services coming from the operational budget for Yellowstone Apartments.</p> <p>Anesis Therapy - MSP Real Estate has agreed to lease the facility to Anesis Therapy at well below market rate rents in order to help ensure the Operator can provide services that will help improve the life of community residents and be affordable to individuals whose income is at or below 60% CMI of the area median income. The project is subsidizing the rent paid by Anesis Therapy for the commercial space by approximately \$10,000-\$15,000 per year.</p>	<p>The Salvation Army of Dane County - In 2022, the DAVNS program served 72 households (consisting of 85 adults and 110 children) with 85% of the households successfully housed at the end of the year. In 2022, the RISE program served 39 households (consisting of 51 adults and 80 children) with 93% of the families successfully housed at the end of the year. The average cost of rental assistance per family was \$5,240.92</p> <p>The Salvation Army of Dane County & Dane County Veterans Service Office (CVSO) - The Project Owner and/or its property management agent will, during lease-up and whenever one of the supportive housing units is vacant, contact The Salvation Army and CVSO asking for referrals of prospective residents who are low income and are in need of additional support for self-sufficiency. This contact will be made by the Project Owner or the onsite property management agent staff via email or phone. The Salvation Army will refer prospective residents to the Project from its DAWN and RISE programs. If a resident of the project chooses to receive services and qualifies for the DAWN or RISE program from The Salvation Army, The Salvation Army will provide necessary case management services. CVSO will also refer prospective residents.</p> <p>The Project Owner and/or its property management agent will make existing and prospective residents aware of services and resources available to them from The Salvation Army and CVSO by provision of a tenant resource area within the common area of the Project. The Salvation Army and CVSO shall provide the Project Owner and its agents with brochures and other materials to provide information about available supportive services from The Salvation Army and CVSO. The Salvation Army will also include the Project on a list of housing options for low income individuals/families seeking housing.</p> <p>The Project Owner and/or its property management agent will also contact the supportive service partners should it become aware or have issues of tenancy</p>
<p>Relevant performance data that provides insight into the supportive service partner's experience serving the target tenant population, and the outcomes for their tenants. Metrics could include the number of individuals served in a related program in a year, housing retention rates for individuals served in that program, connections to employment, etc:</p> <p>How the supportive services partner and the respondent will work together to ensure the best outcomes for tenants, such as housing retention:</p>	

that the supportive service partners may be able to provide assistance for to insure housing retention. The Project Owner and its property management agent will work with The Salvation Army and CVSO in a collaborative effort to insure maximum success of this supportive services partnership to assist individuals/families with their respective housing needs.

Anesis Therapy - MSP Real Estate will lease the facility to Anesis Therapy at well below market rate rents in order to help ensure the Operator can provide services that will help improve the life of community residents and be affordable to individuals whose income is at or below 60% of the area median income. The Project Owner and/or its property management will have a collaborative relationship with Anesis Therapy to utilize the Facility to provide services that will help improve the quality of life of community residents. MSP has incorporated Anesis Therapy's feedback in initial discussions to help design a space best suited for serving future residents and clients. The project will also provide residents with access to Anesis Therapy's marketing materials through a tenant resource area within the common area of the development as mentioned above.

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

The Salvation Army of Dane County - The Salvation Army is a worldwide religious and charitable organization dedicated to serving those in need without discrimination. In Dane County, they have one worship and community center and two homeless shelters. Alongside the Single Women's Shelter and 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. In 2022, the DAWNIS program served 72 households (consisting of 85 adults and 110 children) with 85% of the households successfully housed at the end of the year. In 2022, the RISE program served 39 households (consisting of 51 adults and 80 children) with 93% of the families successfully housed at the end of the year. The average cost of rental assistance per family was \$5,240.92

Dane County Veterans Service Office (CVSO) - CVSO is an organization which assists eligible veterans and their dependents in applying for state and federal veterans benefits, and whose mission is to serve all veterans and their families, with dignity and compassion, by providing assistance in the preparation and submission of claims for benefits to which they may be entitled, and to serve as their principal advocate and link to services on veterans' related issues. CVSO consists of seven dedicated individuals who are focused on advocacy for veterans and their families. CVSO is also VA-accredited through several nationally recognized veterans service organizations.

Anesis Therapy - Anesis Therapy (ACMFT) is a state certified DHS clinic that provides mental health, substance abuse, and case management services. Anesis was established to bring more cultural competent mental health care in the Dane County area in 2016 by Myra McNair. ACMFT staff is comprised of racially, culturally, and linguistically diverse staff that bring insight into the dimensions of identity that they seek to address at their clinic. Their diverse staff bring rich life and clinical experience, insight, and community knowledge that deeply supports

structural inclusivity within all aspects of their reach. Their philosophy is rooted in systems therapy meaning that they approach problems that people have in their social, cultural, and political storylines. They believe in helping their clients identify their values and skills so they can effectively confront whatever problems they face. Anesis is a State certified mental health (DHS 35) and AODA (DHS 75) clinic.

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.

MSP Real Estate, Inc. (MSPRE) and its subsidiaries Heritage Assisted Living LLC, MSP Development Company, Inc., MSP Construction, Inc. and MSP Property Management, LLC, make up a full service real estate development company.

Established in 1988 by Milo Pinkerton, MSPRE has assembled a team with experience and tenacity. We are a long-term owner that owns over 90 percent of what we have built. Our philosophy is to develop high quality properties in strategic markets to ensure the best investment for us, our partners and the communities in which we build.

MSPRE has experience with public/private development projects utilizing TIF, HOME Funds, Federal Home Loan Bank funding, CBDG, Metropolitan Council grants, and DTED grants. MSPRE has extensive knowledge of real estate development gained over the past 33 years of development experience that also includes a growing portfolio of affordable housing.

Since 1991, MSP Development has been applying for and securing awards for Low Income Housing Tax Credits allocated by the Wisconsin Housing and Economic Development Authority (WHEDA), Minnesota Finance Authority, and Indiana Housing Authority and has secured tax credits for a total of 33 projects in the Midwest. These project have provided over 1,900 units of housing with nearly 390 more units on the way.

**See attached exhibit 1d. Development and Service Team Background for more information on MSP's extensive multifamily and affordable housing experience.

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

MSP Property Management, LLC (MSPPM) was formed in 2006 to more fully service its affordable housing and market-rate housing in Wisconsin. MSPPM currently manages over 1,600 units throughout the state of Wisconsin. MSPPM has many years of experience with ongoing compliance when it comes to affordable housing projects and has also worked with various supportive services partners on past projects.

**See attached exhibit 1d. Development and Service Team Background for more information on MSP Property Management's experience and qualifications.

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
FIRST MORTGAGE	\$3,340,000	LAND	\$1,790,000
DANE COUNTY AHDF	\$1,500,000	CONSTRUCTION	\$14,012,644
CITY OF MADISON AHF	\$2,040,000	CONTINGENCY	\$695,632
DEFERRED DEVELOPER FEE	\$569,255	ARCHITECT/ENGINEER	\$350,000
TAX CREDIT PROCEEDS	\$12,458,754	INTERIM/CONSTRUCTION	\$1,035,375
		PERMANENT FINANCING	\$65,000
		SOFT COSTS	\$446,598
		SYNDICATION COSTS	\$7,760
		DEVELOPMENT FEE	\$1,260,000
		RESERVES/LEASE-UP	\$245,000
TOTAL	\$19,908,009	TOTAL	\$19,908,009

X. Which of the identified sources have been secured?

We secured an award of WHEDA Low Income Housing Tax Credits (LIHTC) in May 2023. Our proforma is projecting an estimated tax credit equity amount of \$12,458,754 (62.6% total sources) based on current equity pricing of \$0.89 in the tax credit marketplace. This projected equity is subject to potential changes (positive or negative) in tax credit market pricing until the time of firm commitment not expected to occur until late 2023.

Supportable first mortgage debt of \$3,340,000 (16.8% total sources) can be achieved based on projected operating income and expenses of the development.

Our deferred development fee of \$569,255 (2.9% total sources) represents 45% of the total development fee for this proposal.

We are applying to the City of Madison Affordable Housing Fund for \$2,040,000 (10.2% total sources) concurrent with this application as the City of Madison AHF application deadline is August 15, 2023. We expect to be notified of City of Madison Affordable Housing Funds awarded to this development by December 2023. There is no guarantee our award will be approved nor approved at the amount requested.

We are showing the gap of \$1,500,000 (7.5% total sources) as our request for Dane County Funds. As there are a total of 89 affordable unit bedrooms, the per affordable unit bedroom cost comes out to be \$16,853.93 of Dane County Funds per affordable unit bedroom.

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.

Yellowstone Apartments, a family development, applied for 9% WHEDA Low Income Housing Tax Credits (LIHTC) in January 2023 in the General set-aside and received an award of tax credits in May 2023.

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

The Dane County Affordable Housing Funds will enhance the project's ability to reduce the first mortgage debt to provide housing opportunities for residents at the lowest income levels, including 12 of the 30% CMI units, 24 of the 50% CMI units, and 15 of the 60% CMI units spread across one, two, and three-bedroom units. This funding will also help address the feasibility of constructing three-bedroom units to address the high need for these larger units. The proposed project will contain 10 three-bedroom units (17% of total units), all of which are affordable, to help address this recognized need. This level of funding support will ensure that 60 units of affordable housing are constructed to further advance the affordable housing goals of Dane County and the City of Madison, including housing for some of the lowest income residents.

As mentioned above, we are showing the gap of \$1,500,000 (7.5% total sources) as our request for Dane County Affordable Housing Development Funds (AHDF). As there are a total of 89 affordable unit bedrooms, the per affordable unit bedroom cost comes out to be \$16,853.93 of Dane County Funds per affordable unit bedroom.

This amount of funding will help to allow the completion of this development from the unknowns that remain in construction costs, tax credit equity pricing, and changes in bank debt interest rates. Given the project's great location in a "Preferred Transit Oriented Development Area" by the City of Madison with access to transit, education, various employment opportunities, and other services/amenities as discussed, this funding will help offset the land costs and construction costs to develop affordable housing in a well-situated and supported area in the City of Madison.

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	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
INCOME										
Gross Potential Rent										
Vacancy										
Other Income										
Total Income										
OPERATING EXPENSES										
Marketing										
Payroll										
Other Administrative Costs										
Management Fees										
Utilities										
Security										
Maintenance Expenses										
Property Taxes										
Insurance										
Reserves for Replacement										
Total Operating Expenses										
Net Operating Income										
Debt Service										
Asset Management										
Cash Flow										

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

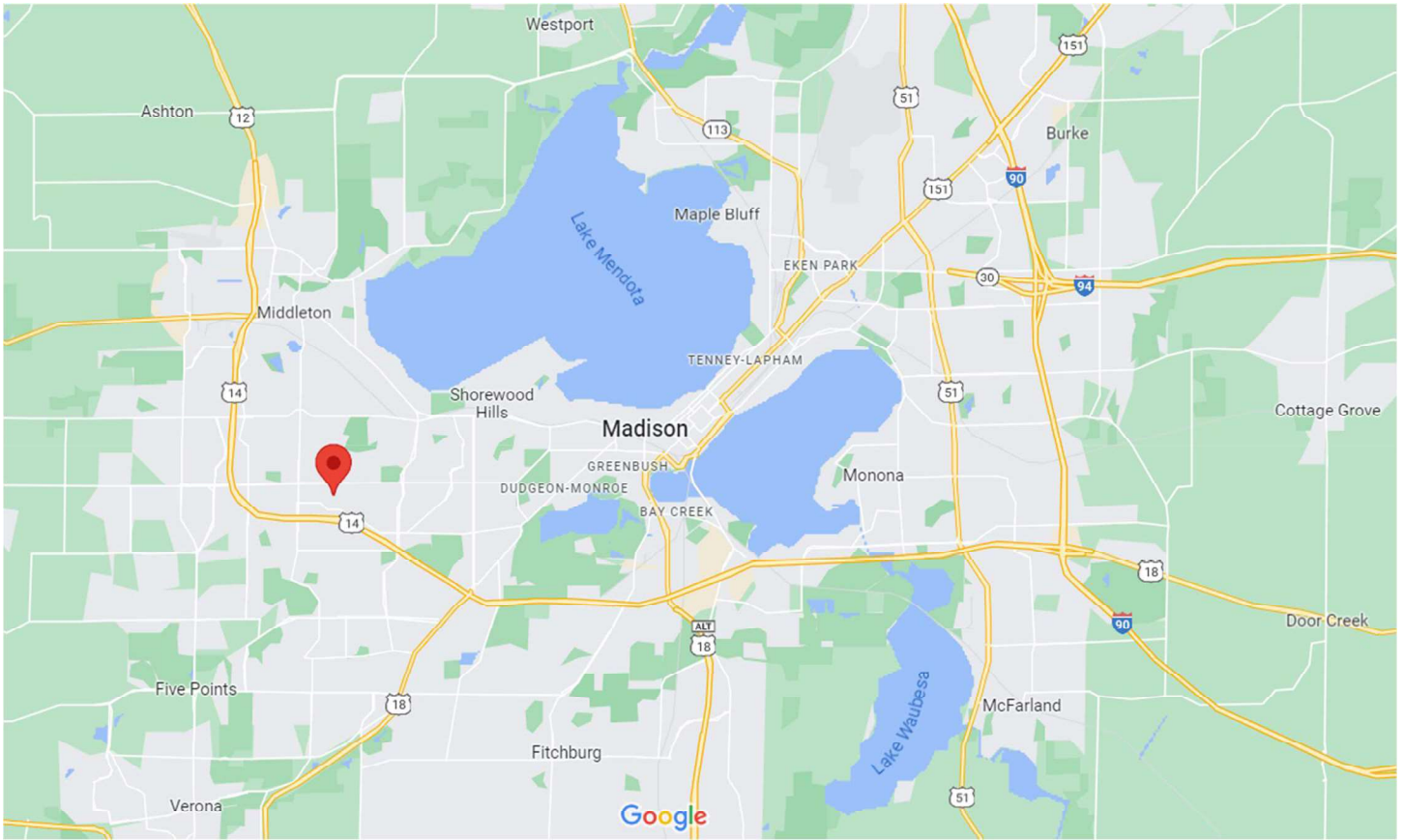
1b. Operating Budget

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
INCOME										
Gross										
Potential Rent	\$849,289	\$866,275	\$883,600	\$901,272	\$919,298	\$937,684	\$956,437	\$975,566	\$995,077	\$1,014,979
Vacancy	-\$59,450	-\$60,639	-\$61,852	-\$63,089	-\$64,351	-\$65,638	-\$66,951	-\$68,290	-\$69,655	-\$71,049
Other Income	\$27,621	\$28,173	\$28,737	\$29,312	\$29,898	\$30,496	\$31,106	\$31,728	\$32,362	\$33,010
Total Income	\$817,460	\$833,809	\$850,485	\$867,495	\$884,845	\$902,542	\$920,592	\$939,004	\$957,784	\$976,940
OPERATING EXPENSES										
Marketing	-\$8,000	-\$8,240	-\$8,487	-\$8,742	-\$9,004	-\$9,274	-\$9,552	-\$9,839	-\$10,134	-\$10,438
Payroll	-\$75,000	-\$77,250	-\$79,568	-\$81,955	-\$84,413	-\$86,946	-\$89,554	-\$92,241	-\$95,008	-\$97,858
Other Administrative Costs	-\$15,000	-\$15,450	-\$15,914	-\$16,391	-\$16,883	-\$17,389	-\$17,911	-\$18,448	-\$19,002	-\$19,572
Management Fees	-\$53,135	-\$54,729	-\$56,371	-\$58,062	-\$59,804	-\$61,598	-\$63,446	-\$65,349	-\$67,310	-\$69,329
Utilities	-\$65,000	-\$66,950	-\$68,959	-\$71,027	-\$73,158	-\$75,353	-\$77,613	-\$79,942	-\$82,340	-\$84,810
Security										
Maintenance Expenses	-\$65,000	-\$66,950	-\$68,959	-\$71,027	-\$73,158	-\$75,353	-\$77,613	-\$79,942	-\$82,340	-\$84,810
Property Taxes	-\$113,100	-\$116,493	-\$119,988	-\$123,587	-\$127,295	-\$131,114	-\$135,047	-\$139,099	-\$143,272	-\$147,570
Insurance	-\$30,000	-\$30,900	-\$31,827	-\$32,782	-\$33,765	-\$34,778	-\$35,822	-\$36,896	-\$38,003	-\$39,143
Reserves for Replacement	-\$18,000	-\$18,540	-\$19,096	-\$19,669	-\$20,259	-\$20,867	-\$21,493	-\$22,138	-\$22,802	-\$23,486
Total Operating Expenses	-\$442,235	-\$455,502	-\$469,167	-\$483,242	-\$497,739	-\$512,671	-\$528,052	-\$543,893	-\$560,210	-\$577,016
Net Operating Income	\$375,225	\$378,307	\$381,318	\$384,253	\$387,105	\$389,870	\$392,541	\$395,111	\$397,574	\$399,924
Debt Service	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256
Asset Management	-\$6,000	-\$6,180	-\$6,365	-\$6,556	-\$6,753	-\$6,956	-\$7,164	-\$7,379	-\$7,601	-\$7,829
Cash Flow	\$42,969	\$45,871	\$48,697	\$51,440	\$54,096	\$56,659	\$59,121	\$61,476	\$63,718	\$65,839

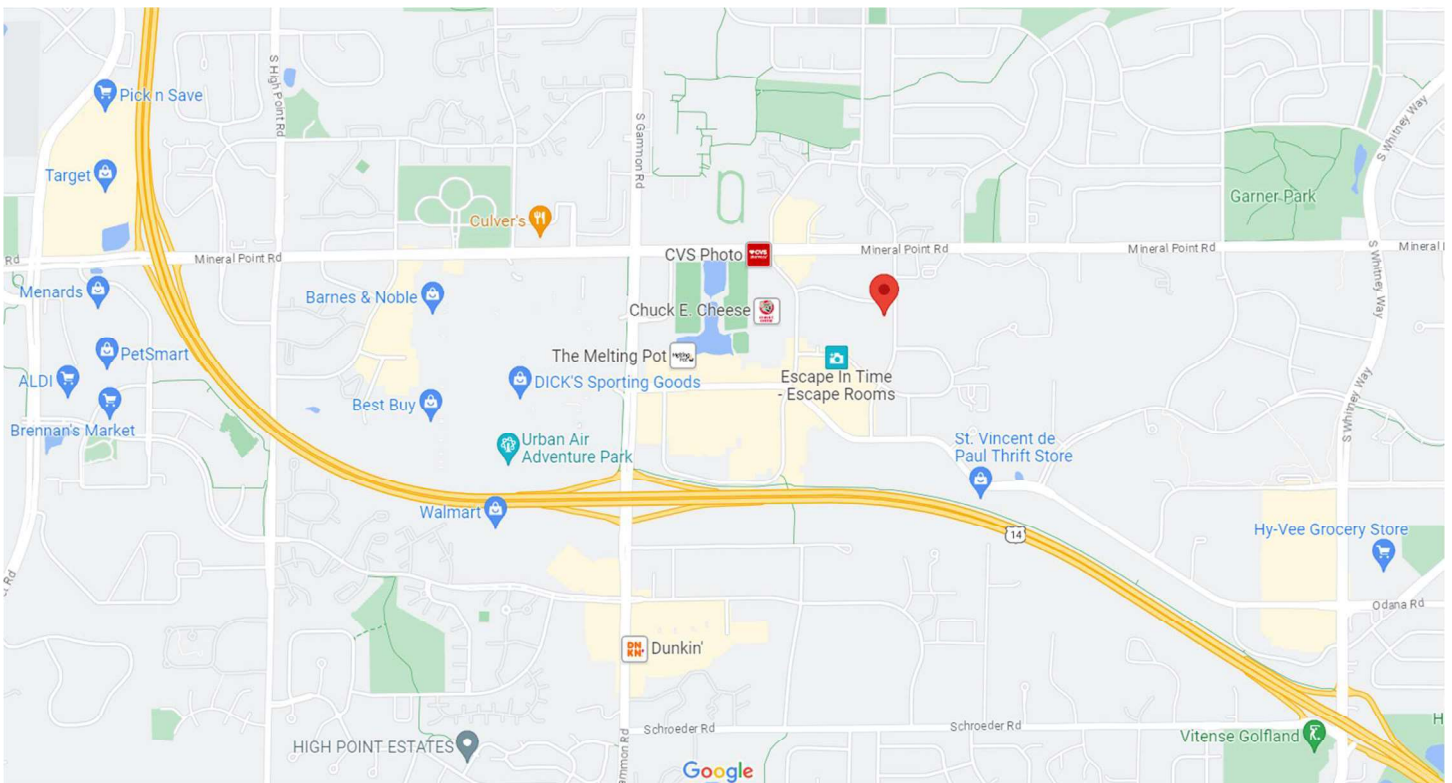
	Year 11	Year 12	Year 13	Year 14	Year 15	Year 16	Year 17	Year 18	Year 19	Year 20
INCOME										
Gross										
Potential Rent	\$1,035,279	\$1,055,984	\$1,077,104	\$1,098,646	\$1,120,619	\$1,143,031	\$1,165,892	\$1,189,210	\$1,212,994	\$1,237,254
Vacancy	-\$72,469	-\$73,919	-\$75,397	-\$76,905	-\$78,443	-\$80,012	-\$81,612	-\$83,245	-\$84,910	-\$86,608
Other Income	\$33,670	\$34,343	\$35,030	\$35,731	\$36,445	\$37,174	\$37,918	\$38,676	\$39,450	\$40,239
Total Income	\$996,479	\$1,016,408	\$1,036,737	\$1,057,471	\$1,078,621	\$1,100,193	\$1,122,197	\$1,144,641	\$1,167,534	\$1,190,885
OPERATING EXPENSES										
Marketing	-\$10,751	-\$11,074	-\$11,406	-\$11,748	-\$12,101	-\$12,464	-\$12,838	-\$13,223	-\$13,619	-\$14,028
Payroll	-\$100,794	-\$103,818	-\$106,932	-\$110,140	-\$113,444	-\$116,848	-\$120,353	-\$123,964	-\$127,682	-\$131,513
Other Administrative										
Costs	-\$20,159	-\$20,764	-\$21,386	-\$22,028	-\$22,689	-\$23,370	-\$24,071	-\$24,793	-\$25,536	-\$26,303
Management Fees	-\$71,409	-\$73,551	-\$75,758	-\$78,030	-\$80,371	-\$82,782	-\$85,266	-\$87,824	-\$90,459	-\$93,172
Utilities	-\$87,355	-\$89,975	-\$92,674	-\$95,455	-\$98,318	-\$101,268	-\$104,306	-\$107,435	-\$110,658	-\$113,978
Security										
Maintenance Expenses	-\$87,355	-\$89,975	-\$92,674	-\$95,455	-\$98,318	-\$101,268	-\$104,306	-\$107,435	-\$110,658	-\$113,978
Property Taxes	-\$151,997	-\$156,557	-\$161,254	-\$166,091	-\$171,074	-\$176,206	-\$181,492	-\$186,937	-\$192,545	-\$198,322
Insurance	-\$40,317	-\$41,527	-\$42,773	-\$44,056	-\$45,378	-\$46,739	-\$48,141	-\$49,585	-\$51,073	-\$52,605
Reserves for Replacement	-\$24,190	-\$24,916	-\$25,664	-\$26,434	-\$27,227	-\$28,043	-\$28,885	-\$29,751	-\$30,644	-\$31,563
Total Operating Expenses	-\$594,327	-\$612,157	-\$630,521	-\$649,437	-\$668,920	-\$688,988	-\$709,657	-\$730,947	-\$752,875	-\$775,462
Net Operating Income	\$402,152	\$404,252	\$406,215	\$408,035	\$409,701	\$411,206	\$412,540	\$413,694	\$414,659	\$415,423
Debt Service	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256	-\$326,256
Asset Management	-\$8,063	-\$8,305	-\$8,555	-\$8,811	-\$9,076	-\$9,348	-\$9,628	-\$9,917	-\$10,215	-\$10,521
Cash Flow	\$67,833	\$69,691	\$71,405	\$72,967	\$74,369	\$75,602	\$76,656	\$77,521	\$78,188	\$78,646

1c. Maps

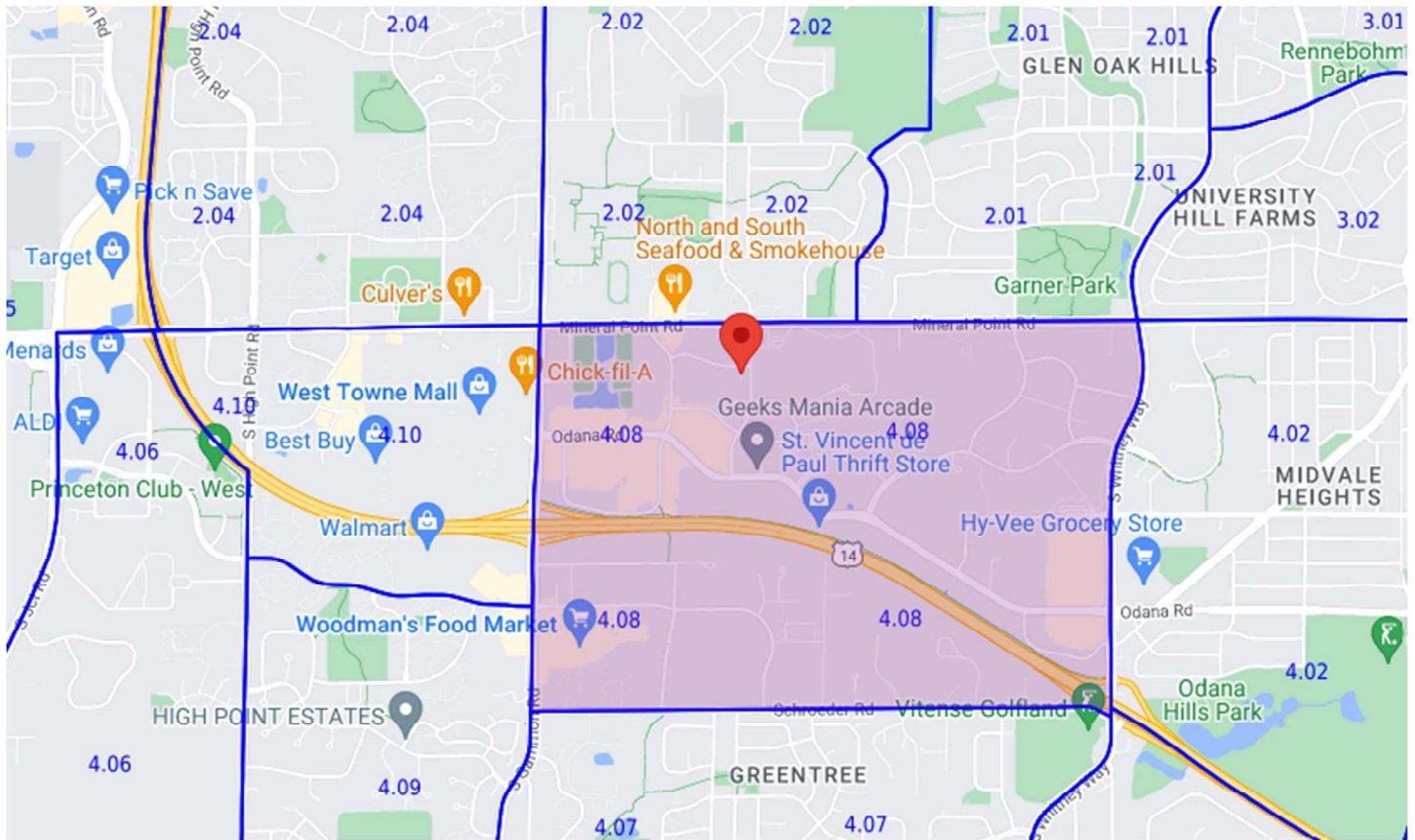
City Context Map



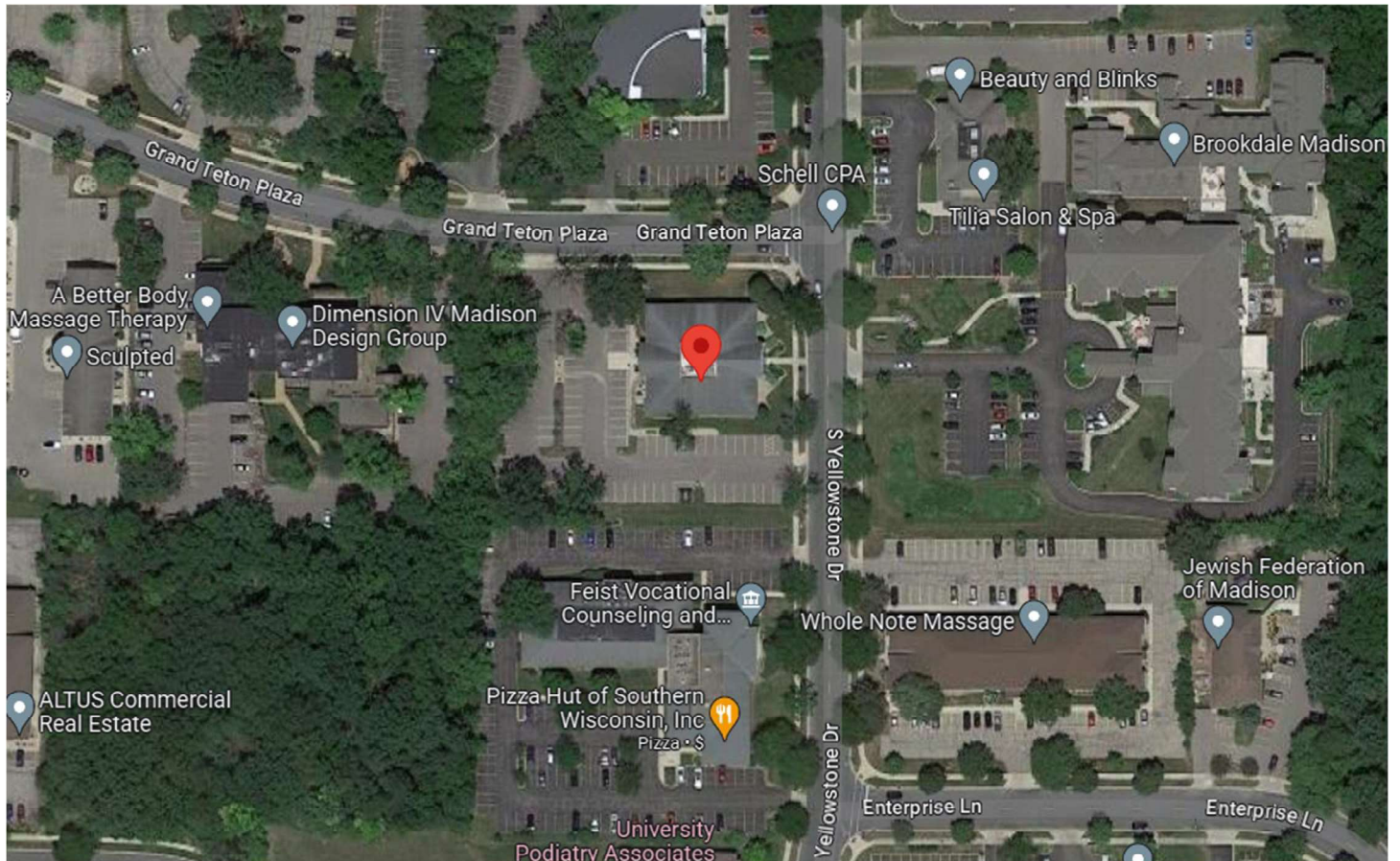
Odana Area Map



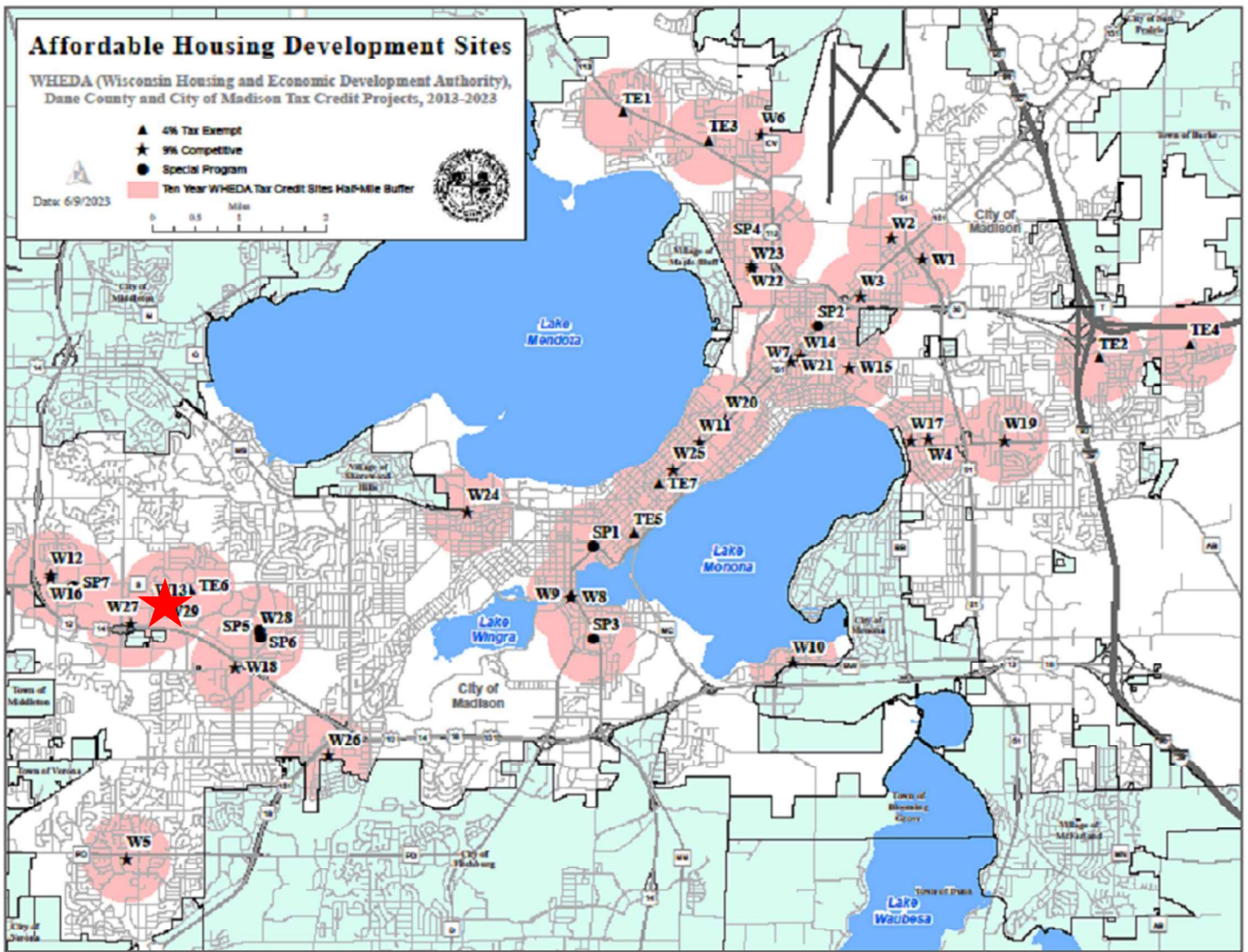
Census Tract Map



Detailed Site Map



Dane County 2023 AHDF Attachment A Map



1d.i Obtaining and Utilizing Section 42 Tax Credits

As our Tax Credit project lists demonstrate below, since 1991 MSP Real Estate has secured awards for tax credits for 33 total projects in the Midwest:

- 16 elderly projects that have provided 1,043 units of senior housing
- 10 family projects that have provided 635 units of family housing
- 2 combined elderly & family projects that have provided 173 units of senior and 73 units of family housing
- 2 projects under construction that will provide 129 units of family housing
- 3 projects in pre-construction that will provide 139 units of senior and 121 units of family housing

Since 1991, MSP Development has been applying for and securing awards for Low-Income Housing Tax Credits allocated by the Wisconsin Housing and Economic Development Authority (WHEDA), Minnesota Finance Authority and Indiana Housing Authority. Please review our list of developments in the following tables:

TAX CREDIT Elderly (Section 42) APARTMENTS

<u>Project Names/ Locations</u>	<u>Units</u>	<u>Financing</u>	<u>Completion Date</u>
<i>The Driftless Apartments, La Crosse</i>	100	Bank	Fall 2024
<i>Tosa Mayfair Senior Apartments, Wauwatosa</i>	39	Bank	Summer 2024
<i>The Oscar Senior Apartments, Madison</i>	55	Bank	June 2022
<i>River Parkway Apartments, Wauwatosa</i>	118	Bank	August 2021
<i>Normandy Square Apartments, Madison</i>	58	Bank	August 2019
<i>Middleton Senior Apartments, Middleton</i>	56	Bank	October 2012
<i>New Berlin Senior II, New Berlin</i>	34	Bank	December 2021
<i>Chippewa Senior Apartments II, Chippewa Falls</i>	24	HOME	October 2011
<i>West Allis Senior Apartments, West Allis</i>	122	WHEDA Bond	April 2009
<i>Monona Senior Apartments, Monona</i>	88	WHEDA Bond	September 2009
<i>Lincoln Village, Port Washington</i>	49	Bank	December 2002
<i>Homestead Village, Chippewa Falls</i>	48	Bank	February 2000
<i>Deer Creek Village, New Berlin</i>	145	Bank	October 2001
<i>Silver Creek Village, Glendale</i>	65	WHEDA Bond	August 2000
<i>Lexington Village, Greenfield</i>	120	Bank	December 1998
<i>Silver Lake Pointe, Moundsview MN</i>	83	Bank	September 1995
<i>Courtyard, West Allis</i>	63	Bank	September 1995
<i>Mill View, Kiel</i>	24	Rural Development	March 1995
<i>Station House, Antigo</i>	40	Rural Development	1991
<i>Village Plaza, Paddock Lake</i>	24	Rural Development	1991
Total Completed	1,216		
Total In Progress	139		
Total Units	1,355		

TAX CREDIT Family (Section 42) APARTMENTS

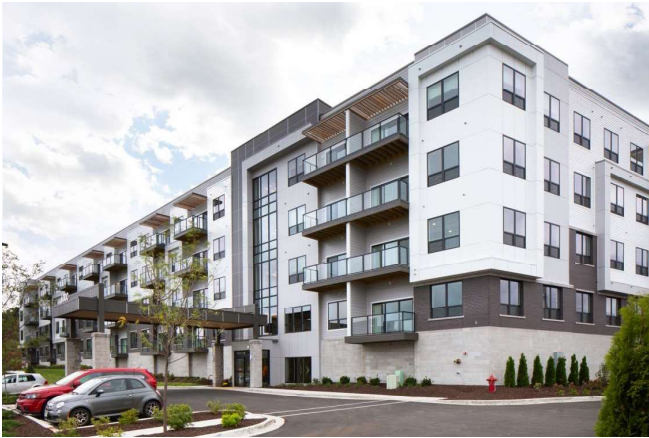
<u>Project Names/ Locations</u>	<u>Units</u>	<u>Financing</u>	<u>Completion Date</u>
<i>Yellowstone Apartments, Madison</i>	60	TBD	Summer 2025
<i>The Driftless Townhomes, La Crosse</i>	20	Bank	Fall 2024
<i>Tosa Mayfair Family Apartments, Wauwatosa</i>	41	Bank	Summer 2024
<i>The Heights Apartments, Madison</i>	79	Bank	Late Fall 2023
<i>River Parkway Phase II, Wauwatosa</i>	50	Bank	Summer 2023
<i>The Oscar Family Apartments, Madison</i>	55	Bank	July 2022
<i>Taylor Pointe Apartments, McFarland</i>	51	Bank	Spring 2022
<i>River Parkway Townhomes, Wauwatosa</i>	18	Bank	May 2021
<i>The Grove Apartments, Madison</i>	112	Bank	September 2020
<i>The Landing, Chippewa Falls</i>	40	Bank	June 2016
<i>Meadow Ridge Apartments, Waukesha</i>	70	Bank	October 2014
<i>New Berlin City Center, New Berlin</i>	102	Bank	December 2012
<i>Silverlake Commons, Moundsview MN</i>	50	MHFA	Feb. 1999 - Sold 2017
<i>Cityside Townhomes, Marshall MN</i>	50	MHFA	Apr. 1997 - Sold 2017
<i>Parkside Townhomes, Redwood Falls MN</i>	30	FNMA	Feb. 1997 - Sold 2017
<i>Valley Farms Apartments, Westfield IN</i>	92	Rural Development	May 1996
<i>Lincoln Square Apartments, Chisholm MN</i>	38	Bank	Aug. 1995 - Sold 2013
Total Completed	708		
Total In Progress	250		
Total Units	958		

1d.ii Participating in Public/Private Joint Ventures

River Parkway Apartments – Independent Senior Living Apartments & Family Townhomes

River Parkway Apartments is a 136-unit project that consists of a 118-unit senior independent living apartment building and 18 multi-family townhome units located in Wauwatosa, WI. 92 units are reserved for low-income seniors and families who earn no more than 60% of the area median income. This site required demolition of industrial buildings, environmental remediation, and fill to raise the site out of the floodplain. The City provided \$1,951,000 in tax increment financing, \$900,000 in FHLB of Chicago affordable housing funds, and WHEDA low-income housing tax credits. This development eliminated an underutilized and blighted site that will continue to provide much needed affordable housing to the City of Wauwatosa. This project was completed in August 2021 and won first place for the 2021 Senior Housing News Architecture and Design Awards in the affordable housing category.

Contact Information: Paulette Enders – Development Director (414)479-3531



The Grove Apartments – Family Apartment Building

The Grove Apartments is a mixed-used redevelopment site that replaced the former Pinney Library and retail center located on the east side of Madison, WI. This project is a 4-story building of 112 units that consists of two buildings that are interconnected with underground parking. Of the 112 units, 95 units are set aside for residents earning no more than 60% of the area median income. This project features first floor commercial space facing along Cottage Grove Road, a 4th floor community room and terrace that has views overlooking Lake Monona. This project received \$3 million in financing from the City of Madison's affordable housing fund. Other financing sources came from Dane County's affordable housing development fund, Federal Home Loan Bank of Chicago affordable housing funds, and WHEDA low-income housing tax credits. This project was completed in September 2020.

Contact Information: Julie Spears – Community Development Specialist (608)267-1983



Normandy Square – Independent Senior Living Apartments

Normandy Square senior apartments is a mixed-used redevelopment site located near the Market Square Shopping Center on the west side of Madison, WI. Normandy Square is a 3-story building with underground parking that consists of 58 units along with 2,000 square feet of commercial space on the first floor. Of the 58 units, 48 of the units are set aside for residents earning no more than 60% of the area median income. The project was financed in part with City of Madison’s affordable housing trust fund, Dane County’s affordable housing development fund, and WHEDA low-income housing tax credits. This project was completed in 2019 and took 12 months to construct and was fully leased up in 4 months. In the Senior Housing News 2019 Architecture and Design Awards, Normandy Square came in 2nd place nationally in the senior housing affordable housing category.

Contact Information: Julie Spears – Community Development Specialist (608)267-1983



Middleton Independent Tax Credit and Heritage Assisted Living and Memory Care

2012 – Heritage Middleton a 135-unit senior housing campus developed at a vacant sentry store in Middleton, WI. MSP put the site under contract in 2011 and worked with the City to help remove an eyesore on the gateway to Madison through Middleton. The site required excavation and haul off approximately 10 feet of soil and replacing that soil with engineered fill. This was due to the site previously sitting at the edge of a lakebed. The City provided \$2,100,000 in tax increment financing and Dane County provided a low interest loan in the amount of \$460,000. MSP also financed this development with tax credits and a 7/10 loan from WHEDA. The \$18,000,000 development consists of a 4 story 56-unit independent tax credit senior building interconnected to a 2 story 79 unit assisted living memory care community. The project is extremely dense on a site of only 2.2 acres but fits the urban design standards encouraged by the City. Construction took 12 months and the project has been full with a long waiting list on the affordable independent side since almost day one of certificate of occupancy.

Contact Information: Abby Attoun – Director of Planning Community Development (608)821-8343



1d.iii Developing Multifamily Housing for Low-Income Households

As made clear in our project lists above, MSP has deep experience developing multifamily housing for low-income households. All our recent tax credit developments have been primarily comprised of units for low-income households.

Further, as indicated in our staff profiles, our current team has a unique blend of experience and educational background with low-income multifamily and senior housing developments:

- Milo Pinkerton has long term expertise and success with this unique development program. Over the past 30+ years, Milo has developed a reputation for high integrity and delivering results to partners and other stakeholders.

MSP Real Estate has a team of seasoned real estate development professionals with over a combined 50 years of direct housing and/or real estate development experience. This means that we not only bring deep knowledge and experience, but also have ample staffing to provide dedicated project management to each new project under development.

As previously stated, MSP Real Estate has assembled a team of seasoned professionals and consultants to augment our in-house team. We have consistently worked with this team on past projects and intend to continue these working relationships in order to ensure project success. Our team includes the following:

- **Outside Legal Counsel:** Foley & Lardner (Madison, WI) - Wayman Lawrence & Katie Rist
- **Accounting:** SVA (Madison, WI) – Glen Weyenberg
- **Architecture:** Dimension IV (Madison, WI) – Jerry Bourquin
- **Engineering:** CJ Engineering (Milwaukee, WI) – Chris Jackson

We have partnered with several different tax credit syndicators on our past tax credit awards.

1d.iv Developing Permanent Supportive Housing

MSP Real Estate has incorporated the supportive housing model in all of our recent affordable housing developments. These developments set aside all or a portion of the projects' 30% CMI units for homeless individuals, those with disabilities, and other targeted populations and connects them with service providers as needed to support these residents' housing stability. Below is a chart showing MSP's projects completed or under construction within the last five years with 30% supportive housing units, target populations, and who the supportive service partners are.

Project	# of 30% Supportive Housing Units	Target Population	Supportive Service Partner(s)
The Heights Apartments	16	-Veterans -Homeless/Nearly Homeless -Special Needs	-Dane County Veterans Services (referral only) -The Salvation Army
River Parkway Phase II	10	-Veterans -Homeless/Nearly Homeless -Special Needs	-Milwaukee County Veterans Service (referral only) -Social Development Commission (SDC)
Taylor Pointe Apartments	11	-Veterans -Homeless/Nearly Homeless -Special Needs -Formerly Incarcerated	-Dane County Veterans Services (referral only) -The Salvation Army -Madison-Area Urban Ministry (MUM) dba JustDane
The Oscar Senior & Family Apartments	22	-Veterans -Homeless/Nearly Homeless -Special Needs -Formerly Incarcerated	-Dane County Veterans Services (referral only) -The Salvation Army -Madison-area Urban Ministry (MUM) dba JustDane
River Parkway Apartments & Townhomes	24	-Veterans -Homeless/Nearly Homeless -Special Needs	-Milwaukee County Veterans Service (referral only) -Aging Resource Center of Milwaukee County (referral only) -Social Development Commission (SDC)
The Grove Apartments	23	-Veterans -Homeless/Nearly Homeless -Special Needs -Formerly Incarcerated	-Dane County Veterans Services (referral only) -Community Action Coalition for South Central Wisconsin (referral only) -The Salvation Army -Madison-area Urban Ministry (MUM) dba JustDane -Porchlight
Normandy Square Apartments	12	-Veterans -Homeless/Nearly Homeless -Formerly Incarcerated	-Community Action Coalition for South Central Wisconsin (referral only) -Madison-area Urban Ministry (MUM) dba JustDane -Middleton Outreach Ministry

1d.v Property Management

MSP Property Management



<https://msprealestateinc.com/>

7901 West National Avenue
West Allis, WI 53214
952-351-4540
952-935-7202

6234 Maywood Avenue
Middleton, WI 53562
608-831-7004
608-359-9493

List of MSP Property Management properties: 15 Senior, 7 Family, and 2 combined Senior/Family projects.

Project Name	Location	Number of Units	Senior/Family	Tax Credit Yes/No
The Oscar Apartments	Madison, WI	110	Senior/Family	Yes
Taylor Pointe	McFarland, WI	51	Family	Yes
River Parkway	Wauwatosa, WI	136	Senior/Family	Yes
The Grove	Madison, WI	112	Family	Yes
Normandy Square	Madison, WI	58	Senior	Yes
Middleton Senior	Middleton, WI	56	Senior	Yes
New Berlin Senior II	New Berlin, WI	34	Senior	Yes
Chippewa Senior II	Chippewa Falls, WI	24	Senior	Yes
Homestead Village	Chippewa Falls, WI	48	Senior	Yes
West Allis Senior	West Allis, WI	122	Senior	Yes
Monona Senior	Monona, WI	88	Senior	Yes
Lincoln Village	Port Washington, WI	49	Senior	Yes
Deer Creek Village	New Berlin, WI	145	Senior	Yes
Silver Creek Village	Glendale, WI	65	Senior	Yes
Lexington Village	Greenfield, WI	120	Senior	Yes
Courtyard	West Allis, WI	63	Senior	Yes
Meadow Ridge	Waukesha, WI	70	Family	Yes
New Berlin City Center	New Berlin, WI	102	Family	Yes
The Landing	Chippewa Falls, WI	40	Family	Yes
Central Pointe	New Berlin, WI	75	Family	No
Village Plaza	Paddock Lake, WI	24	Senior	Yes
Station House	Antigo, WI	40	Senior	Yes
Mill View	Kiel, WI	24	Senior	Yes
Valley Farms	Westfield, IN	92	Family	Yes
Total		1,748		

MSP Property Management and Heritage Senior Living Management have their accounting staff located at offices located in West Allis, WI with property management staff located in offices in Madison and West Allis, WI. We do have a strong local presence in Dane County through our senior campuses and that we developed, own, and manage in Middleton and Monona along with our several tax credit properties in Dane County. Many of our construction suppliers and subcontractors are based out of Dane County.

MSP Property Management, LLC was formed in 2006 to provide professional property management services to its affordable housing and market-rate housing portfolio in Minnesota and Wisconsin. MSP Property Management currently manages over 1,700 units in 16 locations throughout Wisconsin and Indiana. In 2017, 3 family properties (130 units) were sold in Minnesota that MSP Property Management also managed.

MSP Property Management will be the property manager of record for Yellowstone Apartments.

Since 2006, both MSP Property Management and Heritage Senior Living have managed the complexities of Low-Income Housing Tax Credit Compliance.

Staff knowledge of program requirements –

All team members are kept up to date on any state or federal policy changes and the compliance department attends training on a regular basis according to the needs of the state agency and their recommendations. Property management staff do attend WHEDA compliance seminars on an as needed basis.

Staff stability –

All properties and departments are staffed according to pro forma, unit count and state recommendations. Our human resource department has the designated position of 'Recruiter' for all our management company staffing needs when employment vacancies need to be filled.

Processing certifications and recertifications –

All certs and recerts are completed in a timely manner according to the regulations set by the state agency and/or funding program. US-Housing Consultants provides additional third party quality assurance (compliance) oversight.

Fees current or past due –

All state agencies requiring fees for annual reporting or processing utility approvals are up to date.

Tenant files completeness and organization –

All tenant files are third-party audited for accuracy by US-Housing Consultants and MSP/Heritage Senior Living management outlines all file set-up so organization and completeness is the same, no matter which property you walk onto.

Responsiveness to federal and state housing compliance issues including AG 134, Equal Opportunity, Affirmative Fair Marketing Practices, 504 and LIHTC –

All federal and state housing audits or issue responses are handled according to the time limit provided per notification. Our goal at MSP/Heritage Senior Living is to turn around any audit items prior to or earlier than the deadlines provided.

Compliance history – number and quality of 8823's issued –

MSP Property Management has been managing affordable and market rate housing since 2006. Heritage Senior Living Management has been managing assisted living, memory care and independent affordable senior housing since 2000. **In the past 5 years there have only been a few minor tenant file issues that required resolution related to missing documentation only. No substantial reportable recapture of credit issues has ever been reported on these managed properties to the IRS.** Each state has their own standards of practice on when/why to issue an 8823's but we have experienced the same results with our Minnesota based properties that interface with the Minnesota Housing Authority (these properties sold in 2017).

Our third-party consultant, US-Housing Consultants reviews ALL tenant files for tax credit compliance as well as recertification compliance.

MSP Property Management provides all property management functions including Tax Credit certification, recertification, ongoing compliance, all accounting functions, day to day management and maintenance. MSP Property management has grown in size and oversight starting with 66 units in 2 projects in 2006 to over 1,700 units in 16 locations in Wisconsin in 2023. We did sell 3 multifamily properties comprising 130 total affordable family units in Minnesota in 2017 that were also managed by MSP Property Management.

Brian Martin and Nicole Sorensen have over 25 plus years combined Asset Management and Property Management experience. They monitor monthly reports related to rent collection, occupancy, budget to actual costs, leasing status, work orders and tax credit compliance, along with addressing ongoing inspections and reporting for state and lender requirements. Most of our sites are then staffed with on-site managers and maintenance staff dependent on needs of individual properties.

1d.vi Provision of Supportive Services

MSP has substantial experience in the provision of support services on mixed-income properties where we set aside our 30% CMI units as supportive housing units. The 30% CMI units generally make up 20% or greater of the project's total units. We are committed to identifying the right service providers to meet the objectives of the funding source whether it be city, county, or federal tax credit funding that requires a supportive housing component to the development.

Yellowstone Apartments will provide supportive services through our supportive service partners (The Salvation Army of Dane County and Dane County Veterans Service Office) and case management. Those supportive services are in place to increase the independence and long-term housing success of the individuals/families receiving this assistance. Below is a chart showing MSP's projects completed or under construction in the last five years with supportive housing, target populations, and who the supportive service partners are.

Project	# of 30% Supportive Housing Units	Target Population	Supportive Service Partner(s)
The Heights Apartments	16	-Veterans -Homeless/Nearly Homeless -Special Needs	-Dane County Veterans Services (referral only) -The Salvation Army
River Parkway Phase II	10	-Veterans -Homeless/Nearly Homeless -Special Needs	-Milwaukee County Veterans Service (referral only) -Social Development Commission (SDC)
Taylor Pointe Apartments	11	-Veterans -Homeless/Nearly Homeless -Special Needs -Formerly Incarcerated	-Dane County Veterans Services (referral only) -The Salvation Army -Madison-Area Urban Ministry (MUM) dba JustDane
The Oscar Senior & Family Apartments	22	-Veterans -Homeless/Nearly Homeless -Special Needs -Formerly Incarcerated	-Dane County Veterans Services (referral only) -The Salvation Army -Madison-area Urban Ministry (MUM) dba JustDane
River Parkway Apartments & Townhomes	24	-Veterans -Homeless/Nearly Homeless -Special Needs	-Milwaukee County Veterans Service (referral only) -Aging Resource Center of Milwaukee County (referral only) -Social Development Commission (SDC)
The Grove Apartments	23	-Veterans -Homeless/Nearly Homeless -Special Needs -Formerly Incarcerated	-Dane County Veterans Services (referral only) -Community Action Coalition for South Central Wisconsin (referral only) -The Salvation Army -Madison-area Urban Ministry (MUM) dba JustDane -Porchlight
Normandy Square Apartments	12	-Veterans -Homeless/Nearly Homeless -Formerly Incarcerated	-Community Action Coalition for South Central Wisconsin (referral only) -Madison-area Urban Ministry (MUM) dba JustDane -Middleton Outreach Ministry

2. Tenant Selection Plan

RESIDENT SELECTION PLAN – MULTI-FAMILY

This property is a non-age restricted apartment community for low-to-moderate income families. This property subscribes to the following procedures for qualifying applicants for occupancy in this rental development.

Additional restrictions may apply dependent on financing.

Equal Housing Opportunity

MSP Property Management, LLC. and this rental community adhere to local, state, and the federal Fair Housing Law (Title VIII of the Civil Rights Act of 1968, The Fair Housing Amendments Acts of 1988 and Section 504 of the Rehabilitation Act of 1973, all as amended), which stipulates that it is illegal to discriminate against any person on the basis of race, color, creed, religion, sex, national origin, marital status, status with regard to receipt of public assistance, disability, familial status, sexual orientation and gender identity.

THIS IS AN EQUAL HOUSING OPPORTUNITY COMMUNITY

Age and Occupancy Standards

Occupancy standards for this development are no more than 2 people per bedroom. Exceptions may be made on non-senior properties for minors under the age of 2 years old. Minimum occupancy preference is that each affordable unit will be occupied by a minimum of one person per bedroom at the time of occupancy for non-age restricted units.

Income Requirements

Income requirements at this development are prescribed by the Low Income Housing Tax Credit Program ("the Program") outlined in Section 42 of the Internal Revenue Code ("Section 42"). Income limits are issued and annually updated by the Department of Housing and Urban Development for each state by county and/or metropolitan statistical area according to family size. (Refer to Attachment A of this document for the current income limits for this development.) The applicant must demonstrate a financial ability to pay the monthly contribution toward rent, meaning a household may not pay more than 45% of their gross monthly income toward rent. Adjustments to this policy may be made by management depending upon a household's total assets.

Resident Selection Procedures

The following procedures are the established resident selection criteria used by management to determine applicant eligibility:

- A. A formal application form must be completed by all applicants, including a Release of Information Consent Form.
- B. A consumer credit report will be prepared by a credit-reporting agency that will reflect past and present credit history and criminal background search will be completed.
- C. Household income qualification and Program eligibility will be determined in accordance with Program regulations.
- D. Landlord or housing history, including eviction judgement will be determined in accordance with Program regulations.

Occupancy Preferences

Preference for occupancy will be given to households desiring as follows:

- A. Preference will be given on a first come first serve basis for all units. There will be a preference for affordable units given to residents with a minimum of 1 household member to a bedroom. The appropriate earnest money deposit and application fee (if applicable) must accompany each rental application in order to be processed. Apartments will not be held for more than 48 hours without the application and earnest money deposit. For units that are identified for supportive housing, those units will be held open for a minimum of 30 days or until WI OHS or local collaborative long term support partners, in conjunction with the management agent, finds a person meeting the target definition and requisite income qualifications to lease the unit. After the 30 days, the unit may be leased to any otherwise income qualifying applicant(s). If the application is accepted, the earnest money will be put toward the security deposit balance. If the application is rejected, the earnest money will be returned to the applicant within 21 days of the rejection notification. The application fee (if applicable) is non-refundable 48 hours after the application and fee are submitted to management for processing. This fee is used by management to cover costs of processing applications and running credit and criminal history reports, etc.
- B. In accordance with Section 504 of the Rehabilitation Act of 1973, accessible units are allocated using a special priority approach. When accessible units become available, the housing provider will offer the units in the following order:
 1. To current residents who would benefit from the available unit's accessibility features, but whose current unit does not have such features.
 2. To eligible and qualified households on the waiting list with disabilities who would benefit from the available unit's accessibility features.
 3. To other eligible and qualified households on the waiting list (i.e., without disabilities) who may desire the unit, however management may require the household to agree, in writing, to transfer to a non-accessible unit at the owner's request. The request will only be made if an accessible unit is not available to a person who requires the unit's features.

When an accessible unit becomes available, households that need (and currently do not have) the accessibility features assume a position at the top of the waiting list.

Unit-Transfers

All requests for unit-transfers must be in writing and will be processed in the order received. Unit-transfers may be requested after completion of the initial lease term and all lease obligations have been fulfilled (e.g., there are outstanding issues such as unpaid rent, late charges, damages beyond normal wear and tear, significant violations of the lease or House Rules, etc.). It is management's policy to alternate the preference between current residents (without "reasonable accommodations") requiring transfers and new move-in residents on the waiting list. If a resident desires to transfer to another unit in the development, management will re-verify that the household will continue to be Program eligible and income qualified in accordance with Section 42, prior to the unit-transfer.

Rental Application

The rental application for an apartment is designed to give management enough information to determine Program eligibility. Completion of the rental application by a household **does not** mean the applicant has been approved for occupancy. Approval for occupancy is determined only after all information on the application is verified through the certification process.

Selection Criteria/Certification Process

In addition to verifying whether a household is income qualified and Program eligible, management will use various criteria in determining the acceptability of all applicants. An application may be rejected based on one or more of the following criteria. See Tenant Screening Criteria B for those applicants applying for 30% supportive service units.

- A. Insufficient/Inaccurate Information on Application.
If management determines that the applicant has not fully cooperated in all aspects of the application process, or if it is determined that the applicant has falsified information, it is cause for immediate rejection of the application.
- B. Credit and Financial Standing
 1. Management will consider whether all applicants have a satisfactory history of meeting financial obligations, (including timely payment of rent, outstanding judgments or a history of late payments of bills). If management rejects an application based upon the credit report, the applicant will be provided with the name of the credit-reporting agency that performed the credit check. Management will not disclose the specifics of any information reported by the credit bureau. Applicants will be given the opportunity to correct or clear the adverse credit.
 2. The inability to verify credit references is a factor for rejection of an application. Consideration will be given to special circumstances in which credit has not been established.
- C. History of Residency
Management will consider whether the applicant or any other person who will be living in the unit, has a history of physical violence to persons or property, or has exhibited living habits at prior residences that could adversely affect the health, safety, and quiet enjoyment of other residents at the rental community. Management will consider all circumstance regarding this type of activity as well as the period during which it occurred. An Applicant may not be denied admission on the basis that that the applicant is or has been a victim of domestic violence, dating violence, sexual assault, or stalking, if the applicant or tenant otherwise qualifies for admission as stated under the **Compliance with the Violence Against Women Act (VAWA)**.
- D. Other Reasons for Rejection (unless prohibited by local, state or federal law) include, but are not limited to:
 - a. A household member's conviction record (see Attachment B): (Management will take into account evidence that the individual has maintained a good tenant history and/or after the criminal conduct occurred. Management will not reject applicants solely based on arrest records (without conviction));
 - b. Anyone who will live in the apartment who is currently engaged in the use of illegal drugs. (Management will not discriminate against qualified applicants who are former drug users or who have undergone drug or chemical sensitivity treatment. (see Attachment B));
 - c. Rent delinquency;
 - d. False, inaccurate or missing information on the rental application and other related documentation;
 - e. Refusal to accept the lease provisions (rules and regulations, occupancy standards, amount of rent, the unit must be the primary place of residency, etc.) or the Program requirements.

- E. Management will not deny applicants based on the following:
- a. Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months;
 - b. Lack of housing history;
 - c. Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located;
 - d. Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water);
 - e. 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;
 - f. 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;
 - g. Wisconsin Circuit Court Access records.

Pet Policy

Pets may be permitted at this development. Refer to pet lease addendum for pet requirements (breed restrictions may apply). Preapproval by management is required and pet lease will be executed between the household and the owner. Service animals as defined in Section 504 of the Rehabilitation Act of 1973, 42 USC Part 12100 (1990) and the Fair Housing Amendments Act, 42 USC Sect. 3604 (1988) and 24 CFR Sect. 100.204 (1989), are permitted. Service animals include "any guide dog, signal dog, or other animal individually trained to provide assistance to an individual with a disability." Confirmation of the need for a specific service animal may be required from a medical professional. *(A companion animal for a person with an emotional disability is also considered a "service animal." This type of service animal requires verification from a medical professional that the individual meets the definition of "disabled," and that there is a need for a specific companion animal.)*

Application Approvals

If management approves an application, the applicant will be notified by phone or in writing of their acceptance. The applicant shall have two calendar working days from initial notification to accept the apartment. If the applicant does not respond within two (2) working days of the notification, management reserves the right to cancel the application and remove the applicant from the waiting list. It is the applicant's responsibility to notify management of changes of address and phone numbers.

Application Rejections

If management rejects an application, a formal letter of rejection will be sent to the applicant at the address shown on the application unless otherwise notified. Notice of denial includes a written explanation of the Tenant Selection Plan criteria the applicant failed to meet. If the cause for rejection is due to an unfavorable credit history, the applicant will be notified of the credit reporting service, their address and telephone number for direct contact with the service. If it can be verified that the credit report is in error, the application will be re-processed, and, if accepted, the application will be prioritized according to the original application date. Management may not discuss credit-reporting information with the applicant. Notice of denial should inform the applicant how to seek an approval of the housing providers decision.

Denial Process

Prior to a denial based on a criminal record, management shall provide the applicant access to a copy of the criminal record at least five days prior to the in-person appeal meeting and an opportunity to dispute the accuracy and relevance of the report, which is already required of HUD assisted housing providers. See 24 C.F.R. § 982.553(d), which applies to public housing agencies administering the section 8 rent assistance program.

1. Prior to a denial based on a criminal record, management 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, management is encouraged to meet with the applicant to review their application and make an individualized determination of the eligibility, considering: (a) factors identified in management's own screening policies, (b) if applicable, federal regulations, and (c) whether the applicant has a disability that relates to concerns with their eligibility and an exception to the admissions rules, policies, practices, and services is necessary as reasonable accommodation of the applicant's disability. In making a denial decision, management shall consider all relevant circumstances such as the seriousness of the case, the extent of participation or culpability of individual family members, mitigating circumstances related to the disability of a family member, and the effects of denial on other family members who were not involved in the action or failure.
3. Management will base any denial on sufficient evidence. An arrest record or police incident report is not sufficient evidence. Uncorroborated hearsay is not sufficient evidence.
4. Denial notices shall include the following:
 - a. The reason for denial with details sufficient for the applicant to prepare a defense including: (1) the action or inaction forming the base for denial, (2) who participated in the action or inaction, (3) when the action or inaction was committed, and (4) the source(s) of information relied upon for the action or inaction.
 - b. Notice of the applicant's right to a copy of their application file, which shall include all evidence upon which the denial decision was based.
 - c. Notice of the applicant's right to copies of the property manager's screening criteria.
 - d. Notice of the right to request an in-person appeal meeting on the denial decision by making a written request for a hearing within 45 days. Management is not required to hold the unit open while the appeal is pending.
 - e. Notice of the right to have an advocate present at the in-person appeal meeting and of the right to be represented by an attorney or other representative.
 - f. Notice of the right to present evidence in support of their application, including, but not limited to evidence related to the applicant's completion or participation in a rehabilitation program, behavioral health treatment, or other supportive services.
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 of the application shall be provided to the applicant within ten working days after the in-person appeal meeting.

Short Term Lease Policy (offered at management's discretion)

This property may impose a short term lease fee policy for leases under 9 months, which will require pre-approval from the Area or Regional Manager. A short term lease fee up to \$200/month may apply. Short term leases will not be allowed to expire during the fall through winter months of October through April. On all Section 42 apartments, the initial minimum lease term available is six months. The lease dates must constitute a full six month term (a move-in on the 30th of a month does not equate to a full month's occupancy). Short term leases may not be eligible for rent specials. All short term leases will require a sixty (60) day notice to vacate.

Screening Criteria

This property uses a 3rd party scoring model to screen applicants. See Tenant Screening Criteria B for those applicants applying for 30% supportive service units.

Applicants will not be denied solely due to:

- a. Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months;
- b. Lack of housing history;
- c. Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located;
- d. Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water);
- e. 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;
- f. 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;
- g. Wisconsin Circuit Court Access records.

Exceptions may be made for special conditions, such as medical collections, government rental assistance, or applicants without credit history. Scoring criteria is subject to change.

Attachment A: Current Income Limits

Attachment B: Criminal History/Zero-Tolerance Policy, Screening Criteria, Release Form

Attachment A: Current Income Limits

Family Size	1	2	3	4	5	6	7	8
Dane 30%	25,650	29,310	32,970	36,630	39,570	42,510	45,450	48,360
Dane 50%	42,750	48,850	54,950	61,050	65,950	70,850	75,750	80,600
Dane 60%	51,300	58,620	65,940	73,260	79,140	85,020	90,900	96,720

Attachment B: Criminal History/Zero-Tolerance Policy, Screening Criteria, Release Form

Attachment B

SCREENING CRITERIA & RELEASE FORM

CREDIT REPORT SCREENING:

This property uses a 3rd party scoring model to screen credit history. Scoring parameters are subject to change.

Exceptions may be made for special conditions, such as medical collections, government rental assistance, or applicants without credit history.

FALSIFICATION OF INFORMATION:

Any falsification of information listed on the application will be grounds for denial.

CRIMINAL CONVICTIONS/CURRENT DRUG USE:

Management will consider all household member(s)' criminal conviction records (within the bounds of local, state and federal laws) as part of our resident selection criteria. Management will deny all applicants having previous felony convictions or history of misdemeanors, etc., to the extent of the law.

Management will deny any applicant subject to local, state or federal sex offender registry requirements.

SIGNATURE CLAUSE:

I have read and understand the above-mentioned criteria. I authorize investigation of all statements contained in this application for residency as necessary. I agree that this signed release of information may be photocopied at the discretion of MSP Property Management (Agent for Owner) and should be considered as valid as the original. I authorize the owner, its subsidiaries, and its agents to investigate my credit worthiness through any credit bureau or other reasonable means. I further authorize investigation of my criminal background/history. This release for information will expire thirteen (13) months from the date of signature.

Each applicant 18 years of age and older must sign and date below.

Signature of Applicant	Date	Signature of Applicant	Date
Signature of Applicant	Date	Signature of Applicant	Date



Tenant Screening Criteria

MSP Property Management LLC (MSPPM) has extensive knowledge in qualifying and making sure residents are eligible for tax credit or market rate units they are applying for. MSPPM has over 15 years of experience providing management services in the state of Wisconsin and the Midwest. MSPPM will find eligible tenants through various advertising and outreach efforts. For all of our market rate and tax credit units at or above 40% CMI MSPPM will be employing a criteria 'A' screening tool based on income, credit worthiness, and criminal background checks.

For the project's 30% CMI units, we will apply our 'B' screening criteria. For these 30% units, MSPPM will qualify those residents based on a less stringent set of criteria than what is used in our 'A' screening practices. This 'B' tenant screening tool will allow MSPPM to provide more housing choices for applicants in the 30% CMI level and will affirmatively market these units to the specifically targeted population being proposed for these 30% units. The 'B' tenant screening policies allow for greater flexibility to mitigate housing barriers associated with challenged applicants.

MSPPM will also adhere to the seven (7) "Fair Tenant Selection Criteria" selected under the Dane County AHDF 2023 application for Yellowstone Apartments for all of our market rate and tax credit units at or above 40% CMI. For all of our tax credit units at 30% CMI, MSPPM will adhere to all 10 of the "Fair Tenant Selection Criteria." To the extent there are any inconsistencies between MSPPM's criteria and the selected "Fair Tenant Selection Criteria" in the Dane County 2023 application, MSPPM will apply the Dane County "Fair Tenant Selection Criteria."

Tenant Screening Criteria – Criteria B

Income

Test – Monthly Income > 2 Times Rental Amount

If No, other considerations:

- Co-signor
- Ability to provide proof of past ability to pay amount of rent
- Verification of ability to pay through case manager or program source acceptable to landlord

Prior Tenant History

Test – Less than 3 eviction filings in the last 5 years

Test – Only 1 eviction judgement in the last 5 years accepted if has the following:

- Co-signor
- Written payment plan with landlord owed money and proof that payment plan is being adhered to

Behavioral Evictions – Denial if within the last 5 years. No Co-signor opportunity is available to applicants denied for this reason.

Landlord References

Test – Need 1 year of satisfactory landlord reference or 3 years of satisfactory reference in the last 5 years.

- If no history will need co-signor

- Multiple adult member households with only one member references acceptable application may be approved
- 5 day notices for rent can be disregarded with applicant if they have HUD-VASH Voucher
- 5 day for drugs/alcohol or other behavior acceptable with written verification of case management support

Criminal Background Check

Test – Deny for violent felony convictions within the last 50 years but allow for appeals and consideration for extenuating circumstances

Test – Deny for non-violent felony convictions within the last 15-30 years but allow for appeals and consideration for extenuating circumstances

Test – Use in-house Yardi criteria for misdemeanor convictions that require a 5, 7, 15, or 30 year lookback (see table next page).

Test – All registered Sex Offenders/Sex Crimes will be denied

Management will not deny applicants based on the following:

- Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months;
- Lack of housing history;
- Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located;
- 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: (1) a criminal conviction within the last two years for violent criminal activity or drug related criminal activity resulting in a criminal conviction, and (2) 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).

July 21, 2023

Mr. Mark Hammond
Vice President of Development MSP Real Estate
7901 W. National Avenue
West Allis, WI 53214

RE: Management Agreement – Fair Tenant Selection Criteria & Tenancy Addendum –
Yellowstone Apartments

Dear Mr. Hammond,

MSP Property Management (MSPPM), LLC will be the property management company for Yellowstone Apartments, a 60-unit multifamily project, in the City of Madison. MSPPM has over 15 years of management experience with over 1,600 units throughout Wisconsin in both affordable and market-rate housing.

Per the Dane County Affordable Rental Housing Affordable Housing Development Fund 2023, MSPPM agrees to MSP Real Estate's responses in the Dane County Application for 2023 Affordable Housing Development Fund. MSPPM will adhere to all flexible tenant criteria under "Question P: Access to Units for household Experiencing Homelessness" for all 12 of the 30% CMI units. MSPPM will adhere to the seven (7) selected criteria under "Question Q: Fair Tenant Selection Criteria" for all other units. MSPPM will also follow the denial process under "Question Q: Fair Tenant Selection Criteria." Selections to Questions P & Q are attached for reference.

Per the Dane County Affordable Rental Housing Affordable Housing Development Fund 2023, MSPPM agrees to MSP Real Estate's responses in the Dane County Application for 2023 Affordable Housing Development Fund and will adhere to all the tenancy addendum provisions under "Question R: Tenancy Addendum." Question R selections are attached for reference.

If you have any questions, feel free to call me at (608) 359-9493.

Sincerely,



Brian Martin
Vice President of Asset Management
MSP Property Management, LLC

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
<input checked="" type="checkbox"/>	<input type="checkbox"/>

<ul style="list-style-type: none"> • Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months
<ul style="list-style-type: none"> • Lack of housing history
<ul style="list-style-type: none"> • Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located.
<ul style="list-style-type: none"> • Credit score
<ul style="list-style-type: none"> • Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations.
<ul style="list-style-type: none"> • Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water).
<ul style="list-style-type: none"> • 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.
<ul style="list-style-type: none"> • 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.
<ul style="list-style-type: none"> • Wisconsin Circuit Court Access records;
<ul style="list-style-type: none"> • 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.

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

	Yes	No	
Required for funding	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Lack of housing history
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located.
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Credit score
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations.
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water).
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Owing money to a prior landlord or negative rent payment history if the tenant's housing and utility costs were more than 50% of their monthly income.
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Owing money to a prior landlord or negative rent or utility payment history if applicant does one of the following: (1) establishes a regular record of repayment of the obligation; 2) signs up for automatic payment of rent to the housing provider; or (3) obtains a representative payee.
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Wisconsin Circuit Court Access records;
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criminal activity, except: (i) a criminal conviction within the last two years for violent criminal activity or drug related criminal activity resulting in a criminal conviction, and (ii) if the program or project is federally assisted, criminal activity for which federal law currently requires denial. (<i>Violent criminal activity</i> is defined in 24 C.F.R § 5.100 and means any criminal activity that has as one of its elements the use, attempted use, or threatened use of physical force substantial enough to cause, or be reasonably likely to cause, serious bodily injury or property damage. "Drug related criminal activity" is defined in Wis. Stat. s. 704.17(3m)(a)(2). "Drug-related criminal activity" means criminal activity that involves the manufacture or distribution of a controlled substance. "Drug-related criminal activity" does not include the manufacture, possession, or use of a controlled substance that is prescribed by a physician for the use of by a disabled person, as defined in s. 100.264(1)(a), and manufactured by, used, by or in the possession of the disabled person or in the possession of the disabled person's personal care worker or other caregiver.)

Will the project incorporate the denial process detailed below?

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

	Prior to a denial based on a criminal record, the housing provider shall provide the applicant access to a copy of the criminal record at least five days prior to the in-person appeal meeting and an opportunity to dispute the accuracy and relevance of the report, which is already required of HUD assisted housing providers. See 24 C.F.R. § 982.553(d), which applies to public housing agencies administering the section 8 rent assistance program.
1.	Prior to a denial based on a criminal record, the housing provider shall provide the applicant the opportunity to exclude the culpable family member as a condition of admission of the remaining family members.
2.	Prior to a denial decision, the housing provider is encouraged to meet with the applicant to review their application and make an individualized determination of their eligibility, considering: (a) factors identified in the provider's own screening policies, (b) if applicable, federal regulations, and (c) whether the applicant has a disability that relates to concerns with their eligibility and an exception to the admissions rules, policies, practices, and services is necessary as a reasonable accommodation of the applicant's disability. In making a denial decision, the housing provider shall consider all relevant circumstances such as the seriousness of the case, the extent of participation or culpability of individual family members, mitigating circumstances related to the disability of a family member, and the effects of denial on other family members who were not involved in the action or failure.
3.	The property manager will base any denial on sufficient evidence. An arrest record or police incident report is not sufficient evidence. Uncorroborated hearsay is not sufficient evidence.
4.	Denial notices shall include the following: a) The reason for denial with details sufficient for the applicant to prepare a defense, including: i) The action or inaction forming the basis for the denial, ii) Who participated in the action or inaction, iii) When the action or inaction was committed, and iv) The source(s) of information relied upon for the action or inaction. b) Notice of the applicant's right to a copy of their application file, which shall include all evidence upon which the denial decision was based. c) Notice of the applicant's right to copies of the property manager's screening criteria. d) Notice of the right to request an in-person appeal meeting on the denial decision by making a written request for a hearing within 45 days. The housing provider is not required to hold the unit open while the appeal is pending. e) Notice of the right to have an advocate present at the in-person appeal meeting and of the right to be represented by an attorney or other representative. f) Notice of the right to present evidence in support of their application, including, but not limited to evidence related to the applicant's completion or participation in a rehabilitation program, behavioral health treatment, or other supportive services.

5.	If the applicant requests an in-person appeal meeting, the hearing will be conducted by a person who was not involved in or consulted in making the decision to deny the application nor a subordinate of such a person so involved.
6.	The in-person appeal meeting shall be scheduled within ten working days of the request, unless the applicant requests a later date.
7.	A written decision on the application shall be provided to the applicant within ten working days after the in-person appeal meeting.

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

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

a.	Security Deposits. The amount of a security deposit shall not be more than one month's rent.
b.	Late Fees and Other Fees. Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent. 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.	Rights of Youth to Access Common Spaces. Youth under the age of 18 are allow to use and enjoy common areas without supervision. This does not preclude reasonable rules in ensure the safety of children and youth.
d.	Good Cause for Termination. A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined in include the following: (i) a serious violation of the lease; (ii) repeated minor violations of the lease; or (iii) a refusal to re-certify program eligibility. Repeated means a pattern of minor violations, not isolated incidents. Termination notices and procedures shall comply with Chapter 704 of Wisconsin Statutes and federal law, when applicable. Written notice is required for non-renewal and shall include the specific grounds for non-renewal and the right of the tenant to request a meeting to discuss the non-renewal with the landlord or landlord's property management agent within fourteen (14) days of the notice. If requested, the landlord or property management agent will meet with the tenant to discuss the non-renewal, allow the tenant to respond to the alleged grounds for non-renewal, and pursue a mutually acceptable resolution.
e.	<p>Reasonable Guest Rules. Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not limited to the following: (1) Prior authorization of guests by the property management, unless the guest is staying for an extended period of time (e.g. more than 2 weeks); (2) Prohibition on overnight guests; (3) Requiring that the resident be with the guest at all times on the property. (4) Requiring guests to show ID unless requested by the tenant. (5) Subjecting caregivers, whether caring for a child or children, or an adult with disabilities, to limitations on the number of days for guests.</p> <p>Landlord may ban a person who is not a tenant from the rental premises if the person has committed violent criminal activity or drug related criminal activity at rental premises. No person shall be banned from the rental premises without the consent of the tenant unless the following have taken place:</p> <p>(1) A notice of the ban is issued to the tenant stating the:</p> <p>(a) name of the person banned,</p> <p>(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</p>

	<p>(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.</p> <p>(2) If requested, a hearing on the ban has taken place to provide the tenant an opportunity to dispute the proposed ban, discuss alternatives of the ban, and address any unintended consequences of the proposed ban.</p> <p>A tenant may not invite or allow a banned person as a guest on the premises, provided the Landlord has followed the proper procedure and given notice to Tenant as set forth herein.</p> <p>A tenant who violates the guest policy may be given a written warning detailing the facts of the alleged violation. The written warning shall detail the violation, and warn the tenant that repeated violations may result in termination of tenancy. Tenants that repeatedly violate the guest policy, (e.g. three (3) or more violations within a twelve (12) month period) may be issued a notice of termination in accordance with state and federal law.</p> <p>Nothing in this policy limits a person's right to pursue a civil order for protection against another individual.</p>
<p>f.</p>	<p>Parking Policies. Parking policies and practices must comply with applicable laws. Vehicles shall not be towed to a location that is more than 6 miles from the rental premises, unless there is not a towing company with a tow location available within 6 miles.</p>



5 & 6.a The Salvation Army

Brian Peddle
General

Commissioner Brad Bailey
Territorial Commander

Major Steven J. Merritt
Divisional Commander

Major Andrew Shiels
Capital Area Coordinator
Madison Temple Corps Officer

Major Melissa Shiels
Capital Area Program Director
Madison Temple Corps Officer

Captains Vong and Ting Luangkhamdeng
Madison Genesis Corps Officers

July 14, 2023

Mr. Mark Hammond
Director of Development MSP Real Estate
7901 W. National Ave.
West Allis, WI 53214

RE: WHEDA Tax-Credit Rental Housing Development
Yellowstone Apartments – 426 South Yellowstone Drive, Madison, WI 53719

Dear Mr. Hammond,

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 Yellowstone Apartments, located at 426 South Yellowstone Drive, 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 MSP will work with The Salvation Army to target units types with the greatest need which is currently understood to be slighter greater for 2 and 3 bedroom units but generally needed across all unit types. MSP Real Estate will notify the Salvation Army of the number of supportive housing units to be targeted for Salvation Army specific referrals as the project progresses, but currently anticipates approximately 5 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 Yellowstone 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. Cas 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 refers to live at Yellowstone Apartments.

MSP Real Estate and the Salvation Army will also partner with the Homeless Services Consortium for these supportive housing units at Yellowstone Apartments to work toward the goal of ending homelessness for individuals and/or families by providing a preference for households experiencing homelessness.

The Salvation Army strongly supports the proposed apartment community that MSP Real Estate intends to build as a new affordable housing option that will assist the City of Madison'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,



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

5 & 6.b Dane County Veterans Service Office

MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding (the “MOU”) is made on this 11th day of January, 2023 (the “Effective Date”) by and between Dane County Veterans Service Office (CVSO) and MSP Real Estate, Inc or its assigns (Owner) and MSP Property Management LLC (Property Management Agent).

WITNESSETH

WHEREAS, the Developer is the developer of approximately 60 proposed apartment units in a development to be located at 426 S Yellowstone Drive, Madison, WI.

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

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

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

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

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

- 1) The proposed project intends to provide approximately 12 “supportive housing units” (30% CMI units) at very affordable rents. The target population for the supportive housing units is individuals, families, veterans and the senior population who have permanent developmental, physical, sensory, medical or mental health disabilities or a combination of impairments that make them eligible for long term care services.
- 2) Should the proposed project be constructed, Developer and/or its property management agent will, whenever there is a vacant supportive housing unit, contact your office and other area local partners asking for referrals of prospective residents who are low income and are veterans. This contact will be made by the Developer or their onsite management agent staff via email or phone.
- 3) The Developer’s property management agent will establish a waiting list of prospective residents based on referrals described above.
- 4) The Developer and its property management agent will endeavor to make existing and prospective residents aware of services and resources available by provision of a tenant resource area within the common area of the proposed development. The tenant resource area will consist of contact information for the CVSO as well as materials and brochures of the Dane County Aging and Disability Resource Center (ADRC), and other area collaborative partners. New residents will also receive a copy of the CVSO and ADRC brochure directly from the property manager at the time of lease signing. Our onsite management agent staff will be coached regarding “who and how” with regards to the CVSO and ADRC to help

connect residents to the appropriate service networks.

- 5) The proposed project will not provide long term services, nor charge fees related to long term services to residents, but will rather refer residents to the CVSO, the ADRC, and other area local partners in order to assist residents to locate the services and funding appropriate to their individual need.
- 6) Residents will not be required to receive any services in order to reside in the development. Residents that desire to receive services will have a choice in service provider(s).

Administrative Provisions

Duration

This MOU is subject to the project receiving an award of LIHTC, with operations expected to commence in the Summer of 2025. The initial period shall be 12 months from commencement of leasing operations. Either party may terminate this agreement with 30 days' notice at the end of the initial period.

Amendments

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

Confidentiality

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

Nondiscrimination

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

Signatories:

Dane County Veterans Service Office

By:  _____

Date: 1/22/2023

Name: Daniel A. Connery
Title: Veterans Service Director - Dane County
Veterans Service Office

MSP Real Estate, Inc.

By:  _____

Date: 1.23.2023

Name: Mark Hammond
Title: VP of Development

DANE COUNTY VETERANS SERVICE OFFICE

1709 Aberg Avenue – Suite 2
Madison, Wisconsin 53704
Telephone: (608) 266-4158
Fax: (608) 266-4156
Web: www.danevets.com



Joseph T. Parisi
Dane County Executive

Daniel A. Connery
Veterans Service Director

July 17, 2023

MSP Real Estate, Inc.
Alyssa Klecker, Development Associate
1295 Northland Drive, Suite 270
Mendota Heights, MN 55120

RE: Partnering to End Homelessness
Yellowstone Apartments
426 South Yellowstone Drive, Madison, WI

Dear Ms. Klecker,

This letter serves as a supplement to the MOU between the Dane County Veterans Service Office (CVSO) and MSP Real Estate, Inc. or its assigns and MSP Property Management LLC dated January 11, 2023. Approximately seven supportive housing units at 30% CMI will be set aside for CVSO. CVSO, MSP Real Estate, Inc., and MSP Property Management LLC will partner with the Homeless Services Consortium for these supportive housing units at Yellowstone Apartments to work toward the goal of ending homelessness for individuals and/or families by providing a preference for households experiencing homelessness.

Sincerely,

A handwritten signature in blue ink, appearing to read "Bridgette Nelson".

Bridgette Nelson
Deputy Director.

7. Certification of Registration for ENERGY STAR Multifamily New Construction & EPA Indoor air PLUS

ONLINE PARTNERSHIP AGREEMENT

Home Builders and Developers

[Contact ENERGY STAR](#) | [Exit Application](#)

Your Organization

Your Partnership

Certification

Contacts

Review

Sign and Submit

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-0005167-20230717**. 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-0005167-20230717%20\[OPA\]](mailto:energystarhomes@energystar.gov?subject=Agreement%20Status%20#PA-0005167-20230717%20[OPA])) or Indoor airPLUS ([mailto:Indoor airPLUS@epa.gov](mailto:Indoor_airPLUS@epa.gov)), as appropriate.

Additional Partnership Opportunities - WaterSense

Through the [WaterSense®](https://www.epa.gov/watersense/) 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 [criteria for performance and efficiency](https://www.epa.gov/watersense/specifications-and-certifications).

Become a WaterSense Partner



Exit Application

Alyssa Klecker

From: energystarhomes@energystar.gov
Sent: Monday, July 17, 2023 3:05 PM
To: Alyssa Klecker
Subject: ENERGY STAR Partnership Agreement Application Received

Is this email not displaying correctly? [View it in your browser.](#)



Alyssa Klecker
MSP Real Estate, Inc.
Milwaukee, WI
Confirmation Number: PA-0005167-20230717

Thank you for your interest in joining the ENERGY STAR program! Your Partnership Agreement application has been received and is now being reviewed by the program.

You will receive another email once your Partnership Agreement has been accepted and your partnership has been activated. At that time, you will receive an additional email containing a username and password that you will use to access your organization's [My ENERGY STAR Account \(MESA\)](#), where you will be able to download the ENERGY STAR logos and other partner-only resources.

If you have additional questions, please contact us at energystarhomes@energystar.gov.

Sincerely

The ENERGY STAR Residential New Construction team

ENERGY STAR® is the simple choice for energy efficiency. For 25 years, EPA's ENERGY STAR program has been America's resource for saving energy and protecting the environment. Join the millions making a difference at energystar.gov.



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Alyssa Klecker

From: energystarhomes@energystar.gov
Sent: Friday, July 21, 2023 1:58 PM
To: Alyssa Klecker; Mark Hammond
Subject: Welcome to ENERGY STAR, New Builder/Developer Partner
Attachments: partnership-agreement.pdf



Dear MSP Real Estate, Inc.,

Thank you for choosing to partner with EPA's ENERGY STAR Residential New Construction program. Attached is a signed copy of your completed Partnership Agreement including the [terms and commitments](#) that govern your partnership. Please keep this document on hand for future reference.

As a partner, you now have access to a suite of ENERGY STAR logos, as well as other technical and marketing resources to help you make the most of your partnership. Your organization will also appear on the [ENERGY STAR Partner Locator](#) in the city and state listed in your Partnership Agreement. Additional states and service areas will be added as ENERGY STAR certified homes and/or apartments in those areas are submitted for your organization. You also have the opportunity to add a web link from the ENERGY STAR Partner Locator to your own website. To obtain this link, simply ensure that your website complies with our [web linking policy](#) and provide your website information to us.

Key resources available to ENERGY STAR partners include:

My ENERGY STAR Account (MESA)

[My ENERGY STAR Account \(MESA\)](#) is a password-protected area of the ENERGY STAR website that is your gateway to many of the resources available only to partners, including the ENERGY STAR program logos. It is also where you can update your organization and contact information to ensure that you receive important emails, such as updates to our program requirements and recognition opportunities. We require each partner to have at least one contact receiving emails from ENERGY STAR.

You will receive a separate e-mail containing your MESA username and password. Please keep this available for



future use, as you will need it for continued access. If you do not receive this email within 24 hours, please email us at energystarhomes@energystar.gov. For additional guidance on using your My ENERGY STAR Account, please refer to the [Introduction to MESA \(PDF\)](#).

Technical Resources and Guidance

You should already be working with a Energy Rating Company (e.g., Energy Rater/Provider) or Manufactured Home Quality Assurance Provider (QAP), depending on the verification method that you will be using to certify your homes/apartments. The [Program Requirements](#) section of the ENERGY STAR website contains a wealth of additional technical information. For manufactured home plants, visit [Getting Started with ENERGY STAR Certified Manufactured Homes](#).



Training and Educational Resources

ENERGY STAR offers free, live webinars, on-demand training videos, and other materials on a variety of subjects to help partners understand, interpret, and effectively implement the ENERGY STAR program in their organizations, as well as learn about emerging energy efficiency and building science-oriented topics that may be of interest. [Find these resources here](#). Included are the following fact sheets:

[Introduction to the ENERGY STAR Single-Family New Homes \(SFNH\) program](#) — Provides an overview of the SFNH program, including eligibility, key features, its relationship to federal tax credits, and how to get started.

[Introduction to the ENERGY STAR Multifamily New Construction \(MFNC\) program](#) — Provides an overview of the MFNC program, including eligibility, key features, its relationship to federal tax credits, and how to get started.

Marketing and Promotional Resources

A suite of no-cost [marketing tools](#) are available to educate prospective homebuyers about the features and benefits of ENERGY STAR certified homes and apartments. These include the ENERGY STAR logos, a consumer brochure and videos, fact sheets, point-of-sale signage, and a sales training toolkit to help prepare sales agents to effectively sell the value of ENERGY STAR to customers. Many of these materials can be customized and co-branded. For manufactured home plants, a [specialized promotional fact sheet](#) is available. For details on proper use of the



ENERGY STAR logo, please review the [ENERGY STAR Logo Use Guidelines](#).

Additional Opportunities: 100% Commitment and Awards Programs

ENERGY STAR builder/developer partners that wish to receive special recognition can commit to building 100% of their homes/apartments to meet ENERGY STAR program requirements. Partners making this commitment are identified with a special 100% icon on the [ENERGY STAR Partner Locator](#) and have access to a special 100% Commitment program logo. Only partners who make this commitment are eligible to receive our most prestigious awards, including the ENERGY STAR Partner of the Year and ENERGY STAR Market Leader recognition. [Learn more about these additional opportunities](#).



Should you have any questions about your participation, please contact us at energystarhomes@energystar.gov.

Sincerely,

The ENERGY STAR Residential New Construction team

ENERGY STAR[®] Partnership Agreement

For Home Builders and Developers

ORGANIZATION INFORMATION

Organization Name: MSP Real Estate, Inc.
Address: 7901 West National Avenue
Milwaukee, Wisconsin
53214
United States
Website: <https://msprealestateinc.com/> (https://msprealestateinc.com/)
Organization Phone Number: (952) 351-4540
Display on Partner Locator: Yes

PARTNERSHIP INFORMATION

Organization Type: Multifamily Builder/Developer
Organization Sub-Type(s): Multifamily Low Rise Buildings
Market Area(s): Affordable Housing;Market Rate Housing
Typical Annual Build Rate: 150

ENERGY RATING COMPANY

Energy Rating Company: Sustainable Building Solutions

CONTACTS

Name: Alyssa Klecker
Title: Development Associate
Role(s) in Organization: Administrative
Email Address: aklecker@msphousing.com (mailto:aklecker@msphousing.com)
Address: 7901 West National Avenue
Milwaukee, WI 53214
United States
Primary Phone: (414) 308-6142 [Work]
Secondary Phone:
Contact Type: Primary; Signatory

Name: Mark Hammond
Title: Vice President of Development
Role(s) in Organization: Executive Management/Owner
Email Address: mhammond@msphousing.com (mailto:mhammond@msphousing.com)
Address: 7901 West National Avenue
Milwaukee, WI 53214
United States
Primary Phone: (612) 868-9997 [Mobile]
Secondary Phone:

ENERGY STAR[®] Partnership Agreement

For Home Builders and Developers

Contact Type: Primary

Authorized Company Representative: This partnership agreement application represents a binding agreement by the submitting organization.

Signing below indicates that you have read and understand the [Terms and Commitments](https://www.energystar.gov/partner_resources/es_partnership_agreement_home_builders) (https://www.energystar.gov/partner_resources/es_partnership_agreement_home_builders) of this partnership agreement and are authorized to bind this organization to the Terms and Commitments of this partnership agreement.

Printed Name: Alyssa Klecker **Signature:** [Alyssa Klecker] **Date:** 07/17/2023

To be Completed by US EPA

Jonathan Passe, Chief, ENERGY STAR Residential Branch

Signature: [Jonathan Passe] **Date:** 07/21/2023

For more information, contact us at energystarhomes@energystar.gov (mailto:energystarhomes@energystar.gov) or visit www.energystar.gov/homes

Alyssa Klecker

From: energystarhomes@energystar.gov
Sent: Monday, July 17, 2023 3:05 PM
To: Alyssa Klecker
Subject: Indoor airPLUS Partnership Agreement Application Received



Alyssa Klecker
MSP Real Estate, Inc.
Milwaukee, WI
Confirmation Number: PA-0005167-20230717

Thank you for submitting your Indoor airPLUS Partnership Agreement application. Your application has been received and is now being reviewed.

Once approved, you will receive an additional email notifying you that your Indoor airPLUS partnership has been activated and that you can access Indoor airPLUS logos and other partner resources through your [My ENERGY STAR Account \(MESA\)](#).

Please note that your Indoor airPLUS partnership status is dependent on your continued activity as an ENERGY STAR Certified Homes partner.

If you have any questions, please contact us at Indoor_airPLUS@epa.gov.

Sincerely,
The Indoor airPLUS Team

This message was sent to you on behalf of Indoor airPLUS. Each Indoor airPLUS partner organization must have at least one primary contact receiving e-mail to maintain partnership. If you are no longer working on Indoor airPLUS and wish to be removed as a contact, please update your contact status in your MESA account.



1200 Pennsylvania Ave. NW,
Washington, DC
20460

Alyssa Klecker

From: Indoor_airPLUS@energystar.gov
Sent: Friday, July 21, 2023 1:58 PM
To: Alyssa Klecker
Cc: indoor_airplus@epa.gov
Subject: Getting Started with Your Indoor airPLUS Partnership
Attachments: partnership-agreement.pdf



Thank you for joining EPA's Indoor airPLUS Program! You've joined a group of leading builders nationwide taking advantage of EPA's labeling program for indoor air quality that distinguishes new homes built to minimize exposure to airborne pollutants and contaminants. We look forward to helping you improve the health, safety, comfort, and durability of the homes you build, while offering tools to market the benefits of purchasing an Indoor airPLUS qualified home.

A signed copy of your Indoor airPLUS Partnership Agreements has been attached to this email. **Please keep a copy for your records.**

Follow the steps below to take advantage of your new partnership with Indoor airPLUS:

1. Visit Your [MY ENERGY STAR Account \(MESA\)](#)

Access Indoor airPLUS logos and marketing materials through your [MY ENERGY STAR Account \(MESA\)](#). Use your account to update your organization and contact information to ensure that you receive important program announcements.

2. Review the Indoor airPLUS Construction Specifications

Learn more about the indoor air quality measures required to earn the Indoor airPLUS label by reviewing the [Indoor airPLUS Construction Specifications](#). EPA has also developed a guide called "[How to Find Indoor airPLUS Compliant Low-Emission Products](#)" that is particularly helpful in assisting builders and Raters with selecting and verifying compliant materials.

The Department of Energy's [Building America Solution Center](#) also provides extensive guidance to help partners understand the technical basis for the Indoor airPLUS requirements.

3. Work with Your Home Energy Rater

Indoor airPLUS qualified homes must also earn the ENERGY STAR label. To receive ENERGY STAR and Indoor airPLUS labels, you must have your home verified by a Home Energy Rater. Raters can perform the ENERGY STAR and Indoor airPLUS inspections at the same time. Instructions for Indoor airPLUS verification are listed in the Construction Specifications. If you are not already working with a Rater, visit [ENERGY STAR Certified Homes Partner Locator](#) to find one in your area.

4. Understand the Verification and Report Process

The Indoor airPLUS reporting process is integrated with ENERGY STAR and follows the same quarterly reporting schedule. Work with your Rater to verify your homes and ensure that they are reported properly each quarter. You can verify your Indoor airPLUS reported homes by visiting your [MY ENERGY STAR Account \(MESA\)](#) or the publicly available [ENERGY STAR Certified Homes Partner Locator](#). After the home is completed, your Rater can provide you and your homebuyer with:

1. **an Indoor airPLUS sticker label** for the home's electrical panel,
2. **an Indoor airPLUS certificate**, and
3. **a letter of appreciation from EPA.**

Note that it is a partnership requirement to provide each qualified home with an Indoor airPLUS label and certificate.

5. Promote Your Indoor airPLUS Partnership

Be sure to check out the [Indoor airPLUS Sales and Marketing Resources](#) page to access tools and learn tips to promote your partnership! This page includes the latest marketing resources, such as the Discover Indoor airPLUS Homes Customizable Booklet, the Indoor airPLUS Sales Training Kit, and web linking tools to promote your company. Some of these materials are available to the public, while others are limited to Indoor airPLUS partners and can only be accessed through your [My ENERGY STAR Account \(MESA\)](#). **The Indoor airPLUS logos and customizable resources are exclusively available for active partners to download and promote your partnership. Visit the Indoor airPLUS website for more [tips on marketing and social media](#).**



Additionally, your listing on the [ENERGY STAR Certified Homes Partner Locator](#) will include an Indoor airPLUS icon to distinguish your partnership with Indoor airPLUS. And if you choose to elect the 100% Indoor airPLUS Commitment (below), your listing will highlight this designation, as well. If you'd like to have your company's website linked directly from the

Partner Locator, you can make this request following the Indoor airPLUS [Web Linking Guidelines](#).

6. Commit to Building 100% Indoor airPLUS

Take the next step towards healthier homebuilding by committing to constructing 100% of your homes to earn the Indoor airPLUS label. Join a number of builder partners – including custom, regional production, and affordable builders – in giving ALL your homebuyers a safer, healthier, more durable home.



Sign into your [MY ENERGY STAR Account \(MESA\)](#) to select the Indoor airPLUS 100% Commitment designation for the coming year and to access additional program marks to promote your participation.

7. Learn from the Experts

The Indoor airPLUS [podcast series and video collection](#) feature discussions on many current Indoor airPLUS topics, including marketing tips for selling Indoor airPLUS homes, high performance construction practices, healthy home design, and business opportunities in today's home building market. These videos and podcasts are great for both staff training and customer education!

8. Stay Connected

Follow Indoor airPLUS on [Twitter](#) to learn about home building events, construction tips and healthy homes. Connect with Indoor airPLUS on [Facebook](#) to network with experts in the field of green and healthy home construction and learn about the experiences of other home builders and verifiers.

Add the following email addresses to your preferred contacts to make sure you receive timely updates on Indoor airPLUS marketing resources and program changes:

- Indoor_airPLUS@epa.gov
- IAP@icf.com

Contact Us

Please feel free to contact us at Indoor_airPLUS@epa.gov with any questions you have about Indoor airPLUS. We look forward to supporting you in the construction of your Indoor airPLUS homes.



This message was sent to you on behalf of the EPA Indoor airPLUS Program. As a condition of partnership, each Indoor airPLUS partner must have at least one person authorized to receive periodic e-mail updates. This requirement ensures that the organization is aware of program changes, new resources, and other important program news. If you are not the appropriate person in your organization to receive these e-mails, please email Indoor_airPLUS@epa.gov with "Unsubscribe" as the subject and your name and company name in the email. You can reach us at the same email address if you would like to subscribe to program update emails.

Indoor Air Quality (IAQ).

Indoor airPLUS Partnership Agreement

For Home Builders and Developers

ORGANIZATION INFORMATION

Organization Name: MSP Real Estate, Inc.
Address: 7901 West National Avenue
Milwaukee, Wisconsin
53214
United States
Website: <https://msprealestateinc.com/> (https://msprealestateinc.com/)
Organization Phone Number: (952) 351-4540
Display on Partner Locator: Yes

CONTACTS

Name: Alyssa Klecker
Title: Development Associate
Role(s) in Organization: Administrative
Email Address: aklecker@msphousing.com (mailto:aklecker@msphousing.com)
Address: 7901 West National Avenue
Milwaukee, WI 53214
United States
Primary Phone: (414) 308-6142 [Work]
Secondary Phone:
Contact Type: Primary; Signatory

Name: Mark Hammond
Title: Vice President of Development
Role(s) in Organization: Executive Management/Owner
Email Address: mhammond@msphousing.com (mailto:mhammond@msphousing.com)
Address: 7901 West National Avenue
Milwaukee, WI 53214
United States
Primary Phone: (612) 868-9997 [Mobile]
Secondary Phone:
Contact Type: Primary

AUTHORIZED COMPANY REPRESENTATIVE

Printed Name: Alyssa Klecker
Signature: [Alyssa Klecker]
Date: 07/17/2023

TO BE COMPLETED BY US EPA

Signature: [Nick Hurst]
Date: 07/21/2023

Indoor airPLUS Partnership Agreement

For Home Builders and Developers

Indoor airPLUS Partnership Agreement

For Home Builders and Developers

Indoor airPLUS Partnership Agreement for Homebuilders participating in the Indoor airPLUS Program

Updated December 23, 2020

General Terms and Commitments for participation in the Indoor airPLUS Program and for the use of Indoor airPLUS Marks

Through this AGREEMENT, the registered organization ("Partner") joins in partnership with the U.S. Environmental Protection Agency (EPA). Partner recognizes that by accepting this AGREEMENT, it is expected to support EPA in its efforts to educate consumers on the benefits of improved indoor air quality through the Indoor airPLUS Program.

This AGREEMENT is voluntary and can be cancelled by either party at any time and for any reason, with no penalty. Upon cancellation of this AGREEMENT, Partner will no longer have access to program benefits and must promptly cease its use of the Indoor airPLUS name and marks in all applications.

The EPA Indoor airPLUS Program is a voluntary partnership and labeling program that helps improve the quality of indoor air by requiring construction practices and product specifications that minimize exposure to airborne pollutants and contaminants. Indoor airPLUS offers partner organizations an avenue to participate in this mission and differentiate their business in the market. The EPA Indoor airPLUS Program Partnership makes it easy for consumers to identify organizations that build homes/apartments to earn the Indoor airPLUS label.

This partnership and the Indoor airPLUS label are to be used to promote indoor air quality as an easy and desirable option for new homebuyers, current homeowners, and renters to help protect their health and the environment.

This AGREEMENT contains the general terms applicable to partners' use of the Indoor airPLUS marks and describes the commitments made by the EPA and partners for the benefit of the Indoor airPLUS Program and its partners. EPA may periodically amend these Terms and Commitments and will provide notice to partners.

By affixing an electronic signature to the AGREEMENT, the signatory understands that he/she is committing their organization to a partnership with the Indoor airPLUS Program, acknowledges EPA's commitments to its partners, and agrees to comply with all Terms and Commitments of this AGREEMENT.

EPA Commitments

1. EPA will work to increase public awareness of the Indoor airPLUS label, benefits of improved indoor air quality, and the best practices to achieve improved indoor air quality through the construction and verification of Indoor airPLUS homes/apartments.
2. EPA will provide Partner with timely program updates, information, and resources via the Indoor airPLUS website, webinars, e-mail, and presentations.
3. EPA will provide Partner with public recognition for their involvement in Indoor airPLUS and role in protecting human health and the environment through the online partner locator tool, the [Indoor airPLUS](http://epa.gov/indoorairplus/) (<http://epa.gov/indoorairplus/>) web site, and potentially through special awards, and/or other media.
4. EPA will respond to requests for information or clarification regarding Indoor airPLUS Program policies.

Indoor airPLUS Partnership Agreement

For Home Builders and Developers

5. EPA will maintain the integrity of the Indoor airPLUS marks and take all possible steps to deter their misuse.
 6. EPA will actively pursue resolution of noncompliance related to the use of the Indoor airPLUS marks.
-

General Terms and Commitments for All Indoor airPLUS Partners

1. Partner will use the Indoor airPLUS name and marks in accordance with the most current edition of the [Indoor airPLUS Promotional Guidelines](https://www.epa.gov/indoorairplus/indoor-airplus-promotional-guidelines) (<https://www.epa.gov/indoorairplus/indoor-airplus-promotional-guidelines>) (i.e., Logo Use Guidelines) and ensure that its authorized representatives (including, but not limited to, advertising agencies, distributors, installers, subcontractors, sales agents, and retailers) also abide by these requirements.
 2. Partner understands that EPA periodically updates the Indoor airPLUS program requirements and will provide notice to Partner before the effective date of the amendment. Partner is responsible for monitoring EPA's communications about the program, as well as the ENERGY STAR and Indoor airPLUS websites, and will incorporate any program changes into its activities.
 3. Partner will not construe, claim, or imply that its participation in the Indoor airPLUS Program constitutes federal government approval, acceptance, or endorsement of anything other than Partner's commitment to Indoor airPLUS. Partnership does not constitute federal government endorsement of the Partner or its homes or services.
 4. Partner will not imply that homes/apartments built to Indoor airPLUS program requirements will necessarily improve the health of the occupants or that specific health outcomes will be guaranteed as a result of purchasing or renting an Indoor airPLUS labeled home/apartment. Additionally, Partner will not state or imply that the Indoor airPLUS label indicates that a home or building is structurally sound; constructed in accordance with applicable laws, regulations or codes; or free of mold, mildew, volatile organic compounds, allergens, or soil gases (including radon).
 5. Partner understands that the activities it undertakes in connection with Indoor airPLUS are voluntary and not intended to provide services to the federal government. As such, Partner will not submit a claim for compensation to any federal agency for its Indoor airPLUS activities.
 6. Partner understands that EPA does not provide warranties and is not liable for construction and/or product defects or deficiencies resulting from the proper or improper application of the Indoor airPLUS program requirements.
 7. Partner understands that failure to comply with any of the terms of this AGREEMENT can result in its termination and suspension of access to the benefits of Indoor airPLUS, including use of the marks.
 8. Partner and EPA will assume good faith as a general principle for resolving conflict and will seek to resolve all matters informally, so as to preserve maximum public confidence in Indoor airPLUS.
-

Additional Terms and Commitments for Homebuilders participating in the Indoor airPLUS Program

1. Partner understands that, in order to be certified as Indoor airPLUS, all homes and multifamily buildings must be independently inspected, tested, and verified by an eligible Indoor airPLUS Rating Company to meet all Indoor airPLUS program requirements.
2. Partner will use the partnership and the Indoor airPLUS label to promote indoor air quality as an easy and desirable option for new homebuyers and renters to help protect their health and the environment.

Indoor airPLUS Partnership Agreement

For Home Builders and Developers

3. Partner must ensure that a completed Indoor airPLUS certification label is affixed to the circuit breaker box (or other suitable location) of all homes/apartments that are verified to meet the Indoor airPLUS Program requirements. For site-built single-family homes and multifamily apartments, Partner must also provide an Indoor airPLUS certificate.
4. Partner will maintain current ENERGY STAR Certified Homes partnership and complete required ENERGY STAR trainings.
5. To maintain an active partnership, Partner must maintain at least one organizational contact that is receiving required programmatic communications from EPA, and have at least one Indoor airPLUS labeled home/apartment built and reported to EPA by an accredited Home Energy Rating Provider partner in the preceding 12-month period (or 24 months for multifamily builders/developers and single-family builders who construct five (5) homes or fewer annually).
 - a. If this requirement is not fulfilled, Partner will be deemed 'inactive,' will no longer have access to program benefits, and must promptly cease its use of the Indoor airPLUS name and Marks in all applications.
 - b. To re-activate the partnership, an active contact from the organization must acknowledge their review of the most recent program requirements and Terms and Commitments of this AGREEMENT (<http://www.epa.gov/indoorairplus/join-indoor-airplus-program>) and have at least one Indoor airPLUS home/apartment certified by a Rating Company partner, or a home/apartment in the process of Indoor airPLUS certification.
6. Partner must clearly inform homebuyers and renters when their new homes/apartments are certified for the Indoor airPLUS label and be able to describe the features and benefits of these Indoor airPLUS labeled homes/apartments. For each certified home/apartment, provide the homeowner or renter with an Indoor airPLUS label affixed to the circuit breaker box (or other suitable location) as well as an Indoor airPLUS certificate.
7. Upon request, Partner must provide EPA with relevant documentation regarding any home/apartment that was certified as Indoor airPLUS (or potentially represented to homebuyers or renters as such), including, but not limited to, energy rating reports, ENERGY STAR and Indoor airPLUS inspection checklists, and promotional materials.
 - a. If EPA determines that a home/apartment has been improperly certified as Indoor airPLUS, Partner will take necessary actions to resolve the deficiencies documented by EPA in a timely manner.
 - b. If Partner is unable to document that a home/apartment has been properly built and verified to meet program requirements, the Indoor airPLUS label must be removed, as well as any other promotional materials that imply that the home/apartment is certified.
8. If Partner fails to comply with any of the Terms and Commitments of this AGREEMENT, uses the Indoor airPLUS marks improperly, or is found to have other documented infractions pertaining to the construction, marketing, and verification of homes/apartments, their partnership may be terminated, and access to the benefits of Indoor airPLUS, including use of the marks would be suspended.