

DANE COUNTY APPLICATION FOR 2025 AFFORDABLE HOUSING DEVELOPMENT FUND

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

APPLICATION SUMMARY

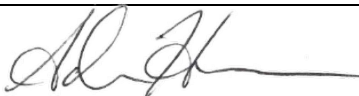
ORGANIZATION NAME	Volker Development Inc., Gabe Fritz and Lutheran Social Services of Wisconsin and Upper Michigan, Inc.		
MAILING ADDRESS If P.O. Box, include Street Address on second line	464 S Hickory St., Ste C, Fond du Lac, WI 54935		
TELEPHONE	952-334-7294	LEGAL STATUS	
FAX NUMBER	N/A	☐ Private, Non-Profit ☒ Private, For Profit ☐ Other: LLC, LLP, Sole Proprietor	
NAME CHIEF ADMIN/ CONTACT	Travis Fauchald Dennis Hanson	Federal EIN: <u>93-2833865</u>	
INTERNET WEBSITE (if applicable)	https://volker.co/ https://www.lsswis.org/	Unique Entity Identifier (UEI):	
E-MAIL ADDRESS	t.fauchald@volker.co dennis.hanson@lsswis.org		

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

PROJECT NAME	PROJECT CONTACT PERSON	PHONE NUMBER	E-MAIL
Volker and LSS - Madison 4% (E Wash & Fair Oaks)	Travis Fauchald	952-334-7294	t.fauchald@volker.co

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
\$63,550,000	\$5,500,000	8.65%



 Signature of Chief Elected Official/Organization Head
 Adam Hanson

Printed Name

 President of Operations
 Title

8/5/2025

Date

PROJECT DESCRIPTION

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

Project Name:	Volker and LSS - Madison 4% (E Wash & Fair Oaks)
Project Address:	Fair Oaks: 3357, 3359, 3361, 3371, 3375 E. Washington Ave., 922, 926, 930 N Fair Oaks Ave.
City, State, Zip:	Madison, WI 53704
Parcel Number:	081032411077, 081032411085, 081032411093, 081032411100, 081032411118, 081032411134, 081032411142, 081032411150
Census Tract:	31540-55-025-0026.01

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

Due to the strategically selected location, thoughtful design, and proactive, open-minded development approach, the project has been well received by all stakeholders during the predevelopment efforts over the past year. Situated in the City of Madison, within the City's 2025 Affordable Housing Target Area and the subsequent Transit-Oriented Development Area, City staff has welcomed the project.

The development team has proactively collected feedback and incorporated it whenever possible to incorporate and deliver the best project that meets the goals and desires of all project partners. See below for the outreach conducted for each project to date, along with the feedback collected from sellers, neighbors, relevant neighborhood associations, staff members, local Alderwomen, applicable commissions, and third-party consultants.

November 2, 2024 - Purchase Agreement Signed (3361, 3365, 3371, 3375 E Washington, 922, 926, 930 N Fair Oaks)

December 2, 2024 - Concept Meeting with the City's Community Development Department

December 5, 2024 - Concept presented at the City of Madison's Development Assistance Team (DAT) meeting.

December 23, 2024 - Concept call with Alder Amani Latimer Burris (former Alder)

December 23, 2024 - Notification of Upcoming Land Use Submission to the Neighborhood Association

January 6, 2025 - Submission of Demolition Permit and Rezoning Application (This land use submission aims to establish a consistent zoning district across all parcels.)

January 23, 2025 - Project-Specific Neighborhood Meeting

January 24, 2025 - Follow-up call with Planning and Traffic Engineering after the neighborhood meeting.

January 29, 2025 - Follow-up meeting with several individual neighbors to discuss retail preferences, the building's color palette, and the landscaping plan.

February 3, 2025 - Follow-up meeting with the City's Community Development Department

March 3, 2025 - Planning Commission Rezoning and Demolition Permit Approval (Unanimous)
 March 5, 2025 - Urban Design Commission Informational Presentation
 March 11, 2025 - Approval of Common Council Rezoning and Demolition Permit (Unanimous)
 April 10, 2025 - Meeting with Adjacent Landowner (3357-3359 E. Wash)
 May 2, 2025 - Signed LOI to acquire the adjacent land located at 3357-3359 E Wash.
 May 16, 2025 - Notification of Upcoming Land Use Submission to the Neighborhood Association
 May 26, 2025 - Conference call with the City's Economic Development team to promote retail space and brainstorm potential mission-driven users.
 June 13, 2025 - CSM and Land Use Application (Conditional Use Permit) Submissions

Forthcoming Meetings:

August 13, 2025 - Urban Design Commission - Initial/Final Approval
 August 25, 2025 - Planning Commission Vote on CSM and Land Use Application (Conditional Use Permit) Submissions
 September 2, 2025 - Common Council Vote on CSM and Land Use Application (Conditional Use Permit) Submittals

Below is a summary of the major requests from stakeholders and the corresponding revisions from Volker:

Over the course of the last year or so, have been requests from the Alder and the neighborhood for additional mixed-use elements and retail space on-site, beyond the original plans that only included space for a supportive provider. In response, several residential units were eliminated, and 2,700 square feet of retail space was incorporated, which will be leased to meet the needs of the community. There were also some calls for enhanced buffers to the neighboring single family homes, which were provided in the form of 2-story townhomes south of the building.

Based on the responsiveness and willingness to collaborate with and incorporate the requests of City staff—including the Community Development Department (CDD), the Development Assistance Team (DAT), members of the Urban Design Commission (UDC), Planning and Zoning staff, and Traffic personnel—along with the project's neighbors and adherence to the processes requested by the Alder, there is support for the project at various levels.

Whether it involves design, the nature of improvements, retail considerations, or concerns about noise, Volker believes that collaboration is essential. All stakeholders should be treated as partners, and their input has been and will be valued and considered throughout the development process and after project completion. This approach ensures the best possible outcome and maximizes impact and success for all parties.

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

The City will provide density bonuses, certain exemptions from impact fees, and assistance in filling the Community-Focused Commercial Space at the Fair Oaks project. For example, the City of Madison offers a Park Infrastructure Impact Fee exemption for each low-cost rental unit, defined as one reserved for households with incomes at or below 60% of the Area Median Income (AMI), with a land use restriction period of at least 30 years. This exemption will be applied to 96 of the project's total units, amounting to \$1,388.13 per unit for multi-family housing, resulting in total savings of \$133,260.48 for the project.

Tax Increment Financing and Affordable Rental Housing Development Funds will be applied for, but their awards is pending as of the date of this application. If awarded City Soft Funds, the City will also participate in leasing assistance, provide referrals, and more.

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

Yes, the project is eligible and will be submitting an application in response to the 2025 City of Madison Affordable Rental Housing Development Tax Credit Request for Proposals (RFP).

The project has been designed and will be developed in a manner that meets the City of Madison's AHF requirements while also accommodating as many of the City's AHF preferences as possible to secure an award.

The locations of the project fall within the City's Affordable Housing Target Area Map. Although there are limited eligibility criteria due to their proximity to the airport, the project is dedicated to addressing noise concerns by incorporating various noise-attenuating measures throughout the buildings. These measures include, but are not limited to, enhanced window glazing, sound mats within the walls, the installation of resilient channels, solid core doors, and improved gypsum drywall. The project team intends on working extremely closely with the City to address noise concerns and to ensure project is designed to adequately attenuate noise.

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

On March 11, 2025, the City of Madison's Common Council voted on a zoning map amendment to establish a consistent zoning district across the majority of the site (CC-T), thereby permitting the proposed multifamily project to proceed. The CC-T zone is designed to create a buffer between high-density commercial areas and residential zones, facilitating a blend of uses that cater to both the daytime workforce and nearby residents, according to the City of Madison. This zoning district typically encompasses a combination of commercial and residential development, emphasizing pedestrian-friendly design and integration with the surrounding neighborhood.

After the successful rezoning on March 11, Volker met with the adjacent landowners who offered to sell and contribute additional land to the project. This addition and modification have been well received by the staff, and they understand that a subsequent rezoning request is forthcoming to rezone the two added parcels from TR-V1 to CC-T. Another successful rezoning is anticipated in the fall of 2025.

Regarding the future land use, the City's Comprehensive Plan recommends Community Mixed Use (CMU) development for the project site. Generally, development within the CMU land use category is intended to support intensive growth, encompassing both commercial and residential uses. CMU areas are designed to feature buildings ranging from two to six stories in height, with a greater emphasis on residential space compared to commercial space. Development and design within CMU areas should promote walkability and be transit-oriented, ensuring strong connectivity to surrounding developments.

Published in 2024 after years of neighborhood planning sessions, public meetings, and community feedback, the Northeast Area Neighborhood Plan reflects a vision shaped by both residents and community stakeholders. This plan began in early 2023 and was completed in summer of 2024, where the public voiced their values along with their concerns and desires for the neighborhood.

The most notable pieces of feedback were regarding walkable neighborhoods, a mix of housing types, transit oriented development, new development and more housing options.

The Fair Oaks development provides a direct response to these long-standing goals that have been years in the making. In addition to supporting the broader City of Madison's Comprehensive Plan, the proposal directly addresses the priorities outlined in the Northeast Area Neighborhood Plan. This local plan emphasizes the need for more affordable housing along the East Washington Avenue corridor in high intensities at major transit corridors, including a diverse mix of unit sizes to accommodate multigenerational and larger families. The Fair Oaks projects will fulfill that request by offering larger units to support larger units and multigenerational families, as well as smaller 1-bedroom units for individuals and couples. Furthermore, the project incorporates ground-floor commercial space, directly responding to the Plan's call for enhanced access to onsite support services and community partnerships that enable residents to thrive.

While the project is appropriately zoned and aligned perfectly with the City's and Neighborhood's Comprehensive Plan, a few routine approvals are still needed from the City of Madison.

- Certified Survey Map (CSM) Approval: The City must grant approval for proposed plats to combine individual lots into a single lot for each project.

- Conditional Use Permit (CUP) and Site Plan Approval - In the City of Madison, larger multifamily residential developments that exceed a specific unit count typically require a Conditional Use Permit (CUP). The CUP process and its associated site plan review are standard procedures in the City. Detailed architectural and civil drawings, which accompany a building permit submission, are necessary to meet these requirements.

- Urban Design Commission Review (Informational & Initial/Final Reviews) - In specific areas of the city, developments are subject to the Urban Design Commission's review and approval of building massing, landscaping, and the exteriors and elevations of buildings.

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

Volker Development, Gabe Fritz and Lutheran Social Services of Wisconsin and Upper Michigan, Inc. (LSS) are grateful for the opportunity to apply for gap financing to present a project that addresses and aligns with many of the core values outlined in the published Dane County Regional Housing Strategy (RHS). This initiative aims to build income and rent-restricted affordable housing at scale, thereby helping advance the County's Annual Housing Production Goals established in the Strategic Action Plan published in 2024.

With one family project consisting of 177 units —this redevelopment will enhance the burgeoning East Washington corridor by transforming aging retail storefronts, commercial buildings, and outdated single-family homes into a vibrant, mixed-income housing community. This apartment community has been designed in exact alignment with the City of Madison's recently amended Comprehensive Plan.

The location has been specifically chosen to facilitate the development of affordable housing in close proximity to public transportation, jobs, schools, community centers, neighborhood services, retail, and healthcare.

The redevelopment project at the intersection of North Fair Oaks Avenue and East Washington Avenue will feature a mixed-use apartment building designed for families, along with commercial

spaces that will be leased to organizations aimed at benefiting both residents and the broader neighborhood. This project includes larger units, specifically two- and three-bedroom types, and will be complemented by six adjacent three-bedroom townhomes that provide family-sized housing in a more urban, walkable, and connected environment. The initiative aims to replace several outdated, dilapidated, and vacant commercial buildings, revitalizing an important corner on East Washington Avenue. The project additionally incorporates the "missing middle" housing type that not only serves as a buffer to adjacent single family homes but also diversifies product types.

The community will offer permanent rent- and income-restricted housing at various income levels (30%, 50%, and 80%) for both individuals and families. The project aims to provide housing for very low-income individuals and families with children. A significant portion of the units will be deeply affordable, with over 20% of the total units (36 units in total) designated for those at 30% of the Area Median Income (AMI). These units will prioritize individuals and families who may be experiencing homelessness or residing in temporary housing, emergency shelters, or other locations not intended for human habitation. The units will encompass a variety of types and will be supported by on-site service providers who will offer resources, case management, and general care to all residents of the project.

There will be 60 units at 50% AMI.

The mixed-use project has been designed to incorporate feedback received from various stakeholders over the past year. They will be sustainable and accessible, featuring a range of amenities tailored to the project's family demographic. Common area amenities will include on-site property management and supportive service providers, a community room, a fitness center, storage lockers, bike parking, mail and package rooms, an outdoor plaza with grilling stations, outdoor games, an outdoor playground for children, a fireplace, lounge and patio seating, green space, and a rooftop patio with a clubroom. The project will also include a large solar system installed on the roof, and a Bcycle station for residents and neighbors to use, with memberships included for residents. Additionally, the project will offer underground garage parking along with surface parking options for residents and visitors.

See below for amenities, accessibility features, and sustainable attributes, along with supportive service options and other benefits that this project will provide to residents and the neighborhood, as well as the city and county.

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

The project is proposing being permanently affordable.

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

Yes, some permanent displacement of residential and commercial tenants will be necessary as part of this redevelopment.

The project will offer relocation services and assistance to residents currently residing on-site, in accordance with a relocation plan that complies with Wisconsin State Statute, the Uniform Relocation Act (URA), HUD Handbook 1378, and Section 104(d) of the Housing and Community Development Act. This relocation assistance is voluntary, as no federal funds are anticipated at this time.

This assistance will involve interviewing residents, collecting necessary information, determining eligibility, providing referrals for replacement housing, offering and processing relocation payments, collecting bids from professional moving companies, facilitating the moving process, and finally, monitoring, maintaining, and closing relocation files upon successful relocation.

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

N/A

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

Yes	No
☒	☐

If yes, indicate which certification will be pursued:

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

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

N/A

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

ON OR BEFORE	MILESTONES
August 2025	Submit for soft funds
October 2025	Submit for WHEDA Bond Inducement and Tax Credits
February 2026	Obtain Land Use Approvals
March 2026	Submit drawings for permits, obtain site plan approval, bid packages released
May 2026	Award bids, execute construction contract
June 2026	Obtain permits, start construction
August 2026	Sitework, Utilities, Foundations
September 2026	Vertical Construction
January 2028	Substantial Completion and TCO, lease-up begins
May 2028	Certificate of Occupancy
October 2028	Project leased

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

ADDRESS #1:	E Wash & Fair Oaks: 3357, 3359, 3361, 3371, 3375 E. Washington Ave., 922, 926, 930 N Fair Oaks Ave										
	# of Bedrooms						Projected Monthly Unit, including Utilities				
% of County Median Income (CMI)	Total # of Units	# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs	\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
≤30%	36		15	14	7			\$645	\$771	\$882	
40%											
50%	60		26	23	11			\$1,132	\$1,355	\$1,557	
60%											
80%	81		35	31	15			\$1,615	\$2,164	\$2,569	
Affordable Sub total											
Market											
Total Units							Notes:	All 36 of the project's 30% AMI units will prioritize homeless individuals and families. Rents are NMR after UA subtraction.			

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

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

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

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

For the project's 50% AMI units, it is anticipated 100% LIHTC net max rents will be charged across one-, two- and three-bedroom units. These rents are supported by a recently obtained market study completed by Baker Tilly.

For the project's units designated for 80% Area Median Income (AMI):

One-bedroom units are underwritten at 86.73% of the Low-Income Housing Tax Credit (LIHTC) maximum.

Two-bedroom units are underwritten at 96.98% of the Low-Income Housing Tax Credit (LIHTC) maximum.

Three-bedroom units are underwritten at 100% of the maximum allowable limit for Low-Income Housing Tax Credits (LIHTC).

Aside from the project's 80% Area Median Income (AMI) units, all other rents listed above are at the maximum allowable rates for 100% Low-Income Housing Tax Credit (LIHTC) units.

That said, depending on rent increases, rents at project completion, the team is open to offering lower rents (90% and below, especially on 80% AMI units) on an ongoing basis after lease-up to ensure that affordable rent levels are maintained and to prevent cost burdens on residents. Rent increases for existing residents at lease renewal will be capped at 2% to protect long-term residents from substantial rent hikes that may be permissible at other LIHTC communities. This measure aims to prevent and eliminate unnecessary displacements for residents.

K. SITE AMENITIES: Check all that apply.

☐	Community Building, square feet:
☒	Community Room, square feet: 3,286
☐	Garages, number: and monthly rent:
☐	Surface parking, number: 41 and monthly rent: 0
☒	Underground parking, number 114 and monthly rent: \$75

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

In-Unit Amenities:

The proposed apartment amenities will include the following features in every unit: LVP flooring, a patio or balcony, ceiling fans in the bedrooms, garbage disposals, dishwashers, a pantry, a microwave, granite or quartz countertops, walk-in closets, ENERGY STAR appliances (range/oven, refrigerator), a washer and dryer, window blinds, and key fob access.

Indoor Amenities:

Indoor common area amenities available to residents to include, but are not limited to, the following: mailboxes, a parcel room, an on-site community service provider, a community room, a fitness center, bike storage, elevators, a smoke-free environment, and on-site property management with private offices for confidentiality. Each unit will also include a storage unit at no additional cost to tenants.

Outdoor Amenities:

The project will provide a variety of outdoor amenities designed to accommodate families with young children and pets. On-site features will include a playground, a picnic area, a spacious dog run, and a Bicycle stations for residents and the neighborhood's use and enjoyment. Additionally, a beautifully landscaped outdoor plaza will offer space for grilling stations and outdoor seating areas.

Solar and Renewable Energy:

The project will incorporate several sustainability features, including, but not limited to, an estimated 376 kW solar PV system with 855 solar panels on the roof. These systems will be installed on the rooftops to generate as much clean and renewable energy as possible. With an associated energy storage system and plans to minimize electricity consumption based on solar production and the finalization of the electrical system, the project has the potential to eliminate utility expenses for tenants and sell excess energy back to the grid.

The project will provide a number of electric vehicle (EV) parking stalls and EV-ready infrastructure to accommodate additional EV parking in the future. It will also promote public transit by offering ample bike parking for residents. In accordance with the 2026 Madison Zoning Requirements, the project will ensure that 4% of parking spaces are equipped with EV charging stations, while 20% of parking spaces will be designated as EV-ready.

The project will collaborate with Focus on Energy and Eco Achievers to ensure that the selected features exceed the requirements of the baseline energy code. They aim to achieve at least a 20% reduction in projected Energy Use Intensity (EUI) compared to the baseline energy code, working towards obtaining a Wisconsin Green Built Communities Gold Plus certification.

Accessibility Features:

The project commits to ensuring that at least 50% of the total units are designed to meet WHEDA Universal Design Requirements. Additionally, at least 50% of the total units will be classified as Type A units or Type B units that can be converted to Type A.

Homeownership Program:

To assist growing families, the project will commit to setting aside at least 5% of tenant-paid rent for use in a homeownership program, with a reserve created in the amount of approximately \$125,000 for this purpose. The owner shall enter into a binding contract with all tenants of Low-Income Housing Tax Credit (LIHTC) units as part of their initial lease agreement, which will include a provision for a rent rebate should the tenant household transition directly into homeownership upon vacating the project. The rent eligible for rebate must be accrued for the tenant's entire term of occupancy within the project. Any vesting period shall not exceed one year of continuous occupancy.

Community-Focused Commercial Space:

Approximately 2,700 square feet of commercial space will be leased at no cost to a community organization that will benefit both the project's residents and the local neighborhood. In engaging with the neighborhood association, residents, the Alder, and through neighborhood meetings regarding this project and others, there have been calls for retail space that have yet to be addressed.

Volker has been collaborating with various business communities and networks to identify two community organizations that can occupy this space. Whether it is a small business, a fair-trade coffee shop, a community organization, a mission-driven retail company, a service provider, or a non-profit, Volker intends to offer this space free of charge in response to the demand for more retail options at this busy intersection. Through goods, services, and programming, Volker aims to activate the street-level environment and enhance the already amenity-rich neighborhood. Volker and their commercial retail broker, Bryant Meyer of Oakbrook Corporation, have contacted the following groups for referrals to potential interested businesses:

Boys and Girls Clubs of Dane County
City of Madison's Office of Business Resources (Michael Miller, George Reistad)
City of Madison's AFFR BizReady Program
Urban League of Greater Madison, Black Business Hub, Madison Black Chamber of Commerce
Wisconsin Latino Chamber of Commerce and Madison Chamber of Commerce
Wisconsin LGBT Chamber of Commerce
Wisconsin Veterans Chamber of Commerce

LOCATION

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

The project is strategically situated to offer residents convenient access to public transportation and essential neighborhood amenities, each designed to meet the specific needs of their residents.

The project is located in a redeveloping, activity-rich corridor directly across from Hawthorne Elementary and just 0.1 miles from Sunny Ridge Kids Childcare, providing convenient access to early education and daycare services. Families enjoy

immediate bus access along East Washington Avenue to travel throughout Madison for recreation or employment, as well as nearby resources such as the nearby Hy-Vee Grocery Store, the East Towne Mall, Heartland Credit Union, Access Community Health Center, and UW Health Evjue Clinic Pharmacy. The site is also within half a mile of Madison College and several public parks, promoting learning and recreation for all ages.

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	Hy-Vee Grocery Store	0.4 miles
Public Elementary School	Hawthorne Elementary School	0.1 miles
Public Middle School	Sherman Middle School	1.5 miles
Public High School	Madison East High School	1.4 miles
Job-Training Facility, Community College, or Continuing Education Programs	Madison College / Madison Area Technical College	0.5 miles
Childcare	Sunny Ridge Kids Childcare	0.1 miles
Public Library	Madison Public Library - Hawthorne	.9 miles
Neighborhood, Community, or Senior Center	East Madison Community Center	0.5 miles
Full Service Medical Clinic or Hospital	Access Community Health Center	0.1 miles
Pharmacy	UW Health Evjue Clinic Pharmacy	0.1 miles
Public Park or Hiking/Biking Trails	Carpenter Ridgeway Park	0.3 miles
	Hawthorne Elementary School Park	0.1 miles
Banking	Heartland Credit Union	0.1 miles
Retail	Madison East Shopping Center	1 mile
	East Towne Mall	1.4 miles
Other (list the amenities)		

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

The project is located in the City's Transit Oriented Development (TOD) Overlay District, given it's close proximity (less than .25 mile) to multiple high-frequency bus lines along the East-West Rapid Corridor, which will take residents and other members of the community throughout Dane County and the rest of Madison.

The site is directly across the street from several bus stops, ensuring families have rapid, consistent connection to schools, jobs, daycare, and neighborhood amenities.

Pricing for the bus lines is subject to the following fares:

- \$2.00 single ride / \$1.00 reduced fare
- \$5.00 per day / \$2.50 reduced fare
- \$16.25 per week / \$7.00 reduced fare
- \$65.00 per month / \$28.00 reduced fare

Reduced fare rates are available for low-income individuals, seniors 65+, youth (Ages 6-12 (or K-12 students)), Medicare card holders, and people with disabilities during non-rush hours.

Key nearby bus stops within .1 miles of the project sites include #9322, #9405, #10117, and #10118.

E Washington at Wright (stop #9322, #9405) is westbound on the 3398 block of E Washington after Wright:

1) Route L - Service every 75 minutes (with connections and transfers to Monona (37 min) and Fitchburg (45 min), along with connections to Route B, C, G and D

Wright-Fair Oaks Station (stop #10117, #10118) is located at the 3400 block of East Washington Avenue (center station platforms on the west side of the Wright Street intersection):

2) Route A - Wright-Fair Oaks station - .1 miles, part of the BRT's Rapid Route A (providing east and westbound service (with connections and transfers to Sun Prairie, Downtown Madison (15 minutes) University of Madison (20 minutes), Madison Area Technical College (6 minutes), Capital (18 minutes), Route A also provides easy connections to Route B and D via the Milwaukee-North station (6 min), along with connections to Bus Route G and P.

These transit options reinforce the development's alignment with the TOD goals of reducing car dependency while enhancing resident mobility and regional access to neighborhood necessities.

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

Volker's property management team will include a full-time property manager, a full-time maintenance technician, and a part-time assistant property manager and/or leasing consultant, all of whom will be on site each business day.

The on-site property management staff—covering both office and maintenance personnel—will be present and available to assist residents during standard business hours, Monday through Friday from 9:00 a.m. to 5:00 p.m., with the potential for limited weekend hours by appointment. These hours will be firmly established and clearly communicated to residents.

Outside of business hours, even when staff are not physically on-site, there will be clear, responsive, and accessible lines of communication between residents and the property management team. In addition, maintenance and emergency coverage will always be available, ensuring residents have access to emergency services 24/7.

Property management staff will also be eligible for a staff discount should they choose to live on-site, provided they meet the applicable income qualifications.

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

At the outset—during the application process, lease signing, and move-in—Volker will provide residents with clear communication regarding lease terms, payment due dates, any available grace periods, payment plan options, and resources for rent assistance or financial counseling.

If a resident misses multiple payments, the property management team will proactively engage before beginning any eviction proceedings. Management will promptly reach out to the resident to address the issue, understand their circumstances, and offer flexible solutions such as rent adjustments, payment plans, waiving late fees, or connecting the resident with financial assistance programs and local support organizations—all with the goal of resolving issues early.

If an eviction filing becomes necessary, management will issue a pre-eviction notice along with a clear explanation of the tenant's rights. Legal aid and mediation services will be made available, as well as access to applicable city and county support programs. Transparent communication will be maintained throughout the process. After filing, management will also consider forgiving outstanding rent balances or damage-related costs.

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

Volker is committed to ensuring that all marketing and property management practices comply fully with federal, state, and local fair housing laws, including but not limited to the Fair Housing Act and the Americans with Disabilities Act. All Volker developments and property management procedures are designed to foster a welcoming, inclusive, and equitable environment for all individuals.

As part of project marketing efforts, application and outreach materials will be made available in multiple languages to accommodate individuals with limited English proficiency. Materials will also be offered in alternative formats and in designated locations to ensure accessibility for persons with disabilities.

When needed or requested, Volker will provide interpreters and translators to assist applicants and residents during the application process, meetings with office staff and service providers, or broader community events.

These practices are supported by Volker's continued training for property management staff, which emphasizes cultural competency, anti-bias strategies, fair housing compliance, accessible design, and inclusive marketing practices.

PROJECT APPROACH

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

Please see below for partnerships that have been formed to not only bring this project to fruition, but also to serve the residents of the proposed project and broader community.

Non-profit, Co-Owner and Co-Developer:

- Lutheran Social Services of Wisconsin and Upper Michigan (LSS) — WI and MI

BIPOC, Emerging Developer serving as Co-Owner and Co-Developer:

- Gabe Fritz - Louisville, KY

General Contractor:

- McShane Construction Company—Madison, WI

Architect:

- Knothe & Bruce Architects, LLC—Middleton , WI

Design Consultants:

- Civil Engineer: JSD —Verona, WI
- Landscape Design: JSD —Verona, WI
- Solar: Full Spectrum Solar—Madison, WI
- Environmental: Braun Intertec—Minneapolis, MN
- Geotech: CGC, Inc.—Madison, WI
- Green Consulting: Eco Achievers—Chicago, IL
- Energy Consulting: Focus On Energy—Madison, WI

Property Management:

- Volker Legacy Holdings Inc. (dba Volker Management) —Fond du Lac, WI

Supportive Services:

- Lutheran Social Services of Wisconsin and Upper Michigan (LSS) — WI and MI

Legal Counsel:

- Reinhart Boerner Van Deuren s.c.—Madison, WI and Milwaukee, WI
- Winthrop & Weinstine—Minneapolis, MN

Misc:

- Madison BCycle—Madison, WI
- First American Title Insurance Company—Madison, WI
- Revival Development Services (Relocation Consultant) - Chandler, AZ

- S. **VOUCHER HOLDER ACCESS:** Will the project commit to lowering rent on units affordable to households at 80% AMI to meet public housing authority payment standards for otherwise eligible applicants who are voucher holders?

Yes	No
☐	☒

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

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

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

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

Yes	No
☒	☐

1.	Prior to a denial based on a criminal record, the housing provider shall provide the applicant access to a copy of the criminal record at least five days prior to the issuance of denial and an opportunity to dispute the accuracy and relevance of the report, which is already required of HUD assisted housing providers. See 24 C.F.R. § 982.553(d), which applies to public housing agencies administering the section 8 rent assistance program.
2.	Prior to a denial based on a criminal record, the housing provider shall provide the applicant the opportunity to exclude the culpable family member as a condition of admission of the remaining family members.

3.	Prior to a denial decision, the housing provider is encouraged to meet with the applicant to review their application and make an individualized determination of their eligibility, considering: (a) factors identified in the provider's own screening policies, (b) if applicable, federal regulations, and (c) whether the applicant has a disability that relates to concerns with their eligibility and an exception to the admissions rules, policies, practices, and services is necessary as a reasonable accommodation of the applicant's disability. In making a denial decision, the housing provider shall consider all relevant circumstances such as the seriousness of the case, the extent of participation or culpability of individual family members, mitigating circumstances related to the disability of a family member, and the effects of denial on other family members who were not involved in the action or failure.
4.	The property manager will base any denial on sufficient evidence. An arrest record or police incident report is not sufficient evidence. Uncorroborated hearsay is not sufficient evidence.
5.	Denial notices shall include the following: a) The reason for denial with details sufficient for the applicant to prepare a defense, including: i) The action or inaction forming the basis for the denial, ii) Who participated in the action or inaction, iii) When the action or inaction was committed, and iv) The source(s) of information relied upon for the action or inaction. b) Notice of the applicant's right to a copy of their application file, which shall include all evidence upon which the denial decision was based. c) Notice of the applicant's right to copies of the property manager's screening criteria. d) Notice of the right to request an in-person appeal meeting on the denial decision by making a written request for a hearing within 45 days. The housing provider is not required to hold the unit open while the appeal is pending. e) Notice of the right to have an advocate present at the in-person appeal meeting and of the right to be represented by an attorney or other representative. f) Notice of the right to present evidence in support of their application, including, but not limited to evidence related to the applicant's completion or participation in a rehabilitation program, behavioral health treatment, or other supportive services.
6.	If the applicant requests an in-person appeal meeting, the hearing will be conducted by a person who was not involved in or consulted in making the decision to deny the application nor a subordinate of such a person so involved.
7.	The in-person appeal meeting shall be scheduled within ten working days of the request, unless the applicant requests a later date.
8.	A written decision on the application shall be provided to the applicant within ten working days after the in-person appeal meeting.

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

Yes	No
☒	☐

a.	Security Deposits. The amount of a security deposit shall not be more than one month's rent.
b.	Late Fees and Other Fees. Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent.
c.	All other fees. All other fees must be directly related to the cost for a specific amenity or service provided to the tenant and comply with all applicable laws. Non-essential services must be transparently identified, and allow tenant to opt out of services if tenant chooses. Junk fees are prohibited and defined as unnecessary, deceptive, or poorly disclosed charges not tied to a legitimate service or cost, and that place an undue burden on tenants. (For example, application fees above \$25 dollars pursuant to Wis. Stat. § 704.085, compounding fees, penalty fees, eviction filing fees, attorney's fees, processing fees, convenience fees for payment, pest control fees, insurance fees, administrative fees or any fees that encompass basic tenancy service.)
d.	Rights of Youth to Access Common Spaces. Youth under the age of 18 are allow to use and enjoy common areas without supervision. This does not preclude reasonable rules in ensure the safety of children and youth.
e.	Written Notice for Termination of Tenancy. Landlord or landlord's agent must serve written notice upon the tenant specifying the grounds (e.g., the dates of relevant event/s, names of parties, reasoning, source of information and relevant documents) for the action at least 30 days before the termination of tenancy, unless shorter timeframe is required by federal funding. Termination for imminent threat of serious physical harm under WI Statute § 704.16(3) and criminal activity under WI Statute § 704.17(3m) are exempted from this requirement.
f.	Good Cause for Termination. A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined in include the following: (i) a serious violation of the lease; (ii) repeated minor violations of the lease; or (iii) a refusal to re-certify program eligibility. Repeated means a pattern of minor violations, not isolated incidents. Termination notices and procedures shall comply with Chapter 704 of Wisconsin Statutes and federal law, when applicable. Written notice is required for non-renewal and shall include the specific grounds for non-renewal and the right of the tenant to request a meeting to discuss the non-renewal with the landlord or landlord's property management agent within fourteen (14) days of the notice. If requested, the landlord or property management agent will meet with the tenant to discuss the non-renewal, allow the tenant to respond to the alleged grounds for non-renewal, and pursue a mutually acceptable resolution.
g.	Reasonable Guest Rules. Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not limited to the following: (1) Prior authorization of guests by the property management, unless the guest is staying for an extended period of time (e.g. more than 2 weeks); (2) Prohibition on overnight guests; (3) Requiring that the resident be with the guest at all times on the property. (4) Requiring guests to show ID unless requested by the tenant. (5) Subjecting caregivers, whether caring for a child or children, or an adult with disabilities, to limitations on the number of days for guests. Landlord may ban a person who is not a tenant from the rental premises if the person has committed violent criminal activity or drug related criminal activity at rental premises. No person shall be banned from the rental premises without the consent of the tenant unless the following have taken place: (1) A notice of the ban is issued to the tenant stating the: (a) name of the person banned, (b) grounds for the ban including, (i) the specific facts detailing the activity resulting in the ban; (ii) the source of the information relied upon in making the ban decision; and (iii) a copy of any criminal record reviewed when making the ban decision; and (c) the right of the tenant to have a meeting to dispute the proposed ban, discuss alternatives to the ban, and address any unintended consequences of the proposed ban.

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

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

The project is fully committed to reserving more than 20% of total units for individuals, seniors, and families experiencing or at risk of homelessness.

Volker and LSS are dedicated to forming lasting, mutually beneficial partnerships with members of the Homeless Services Consortium (HSC) of Dane County to help prevent and end homelessness in the City. Coordination will begin six months prior to construction completion to start identifying potential referrals and applicants.

With LSS's experience working with HSC and Coordinated Entry Systems Managers—and through the provision of safe, high-quality affordable housing and comprehensive supportive service plans—this will play an active role in supporting those in need. Volker and LSS will work promptly to secure referrals, assist with applications, and ensure that those in need have access to the designated units.

Volker and LSS agree not to institute a minimum income requirement beyond what is necessary to cover rent plus utilities for applicants referred through the homeless set-aside. They will waive any minimum income requirement if a rental subsidy program is covering the applicant's rent.

Once leased, LSS will provide on-site case management, ongoing engagement, trauma-informed care, harm reduction services, and serve as a liaison between residents and property management. These efforts will help ensure successful outcomes and contribute to the goal of permanently ending and preventing homelessness.

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

177	36	20.34%
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Name of Supportive Services Provider for Coordinated Entry referrals?

Lutheran Social Services of WI & Upper MI, Inc. (LSS)

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

Yes, LSS has lots of experience working with CE referrals in Dane County.

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

LSS and Volker's property management team will provide as much assistance as reasonably possible throughout the application process. Whether it is walking through applications step-by-step, completing online applications if one might not have a computer or laptop, helping obtain, organize or request necessary documents, coordinate travel (bus schedule, directions) to pick up documentation, provide follow ups or reminders, work alongside property management to ensure documentation is adequately or promptly processed, communicate to or on the behalf of the resident (send emails, obtain either translation, interpretation), etc.

Volker and LSS is committed to provide basic support to expedite the application process, ensuring applicants can get housed as fast as reasonably possible.

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

The project's property management team, Volker's compliance team, alongside LSS (subject to other financing partners and their consultant's review and approval) will evaluate other methods and potential waivers of requirements that might be available to remove any additional barriers, while maintaining compliance with LIHTC program and its requirements).

For example, the following may be considered: simplification of required documentation, waiver of certain requirements based on attestations, if associated backup or documentation is unavailable, application and deposit financial assistance and programs, case-by-case determinations on application shortcomings, etc.

SUPPORTIVE SERVICES:

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

Supportive Services Partner:	Lutheran Social Services of Wisconsin and Upper Michigan, Inc. (LSS)		
Total annual budget for supportive services at project:	\$180,000		
Amount of annual funding project and/or developer will provide directly to supportive services at project:	\$180,000 with annual escalations		
Full-Time Equivalent position(s) dedicated to providing services at project:	1.45 FTE		

Number of estimated weekly on-site hours of supportive services provided by identified partner:	LSS: 56 hours per week on-site with options for virtual counseling and assistance if needed.			
Project will provide on-site services in a dedicated space:	☒	Yes	☐	No

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

SS has served the subsidized and affordable housing sector for over 30 years, owning and managing more than 30 subsidized communities comprising over 425 units. In partnership with the U.S. Department of Housing and Urban Development (HUD), LSS developments provide safe, decent, and affordable housing for older adults, as well as individuals with developmental disabilities, chronic mental illness, or physical disabilities.

LSS brings both development and supportive service expertise, along with the ability to secure soft funding, helping to ensure the long-term success of each project. The organization collaborates closely with partners who share a commitment to delivering high-quality, affordable rental housing that enhances residents' quality of life.

LSS and Volker have worked together on multiple projects in Wisconsin with similar set-asides and have met several times to coordinate this project's design, service plan, level of service, lease-up steps, and planned team coordination.

As of last year, LSS had 1,698 residents enrolled in service coordination across 161 apartment communities. Over the past 12 months, LSS delivered 54,031 units of direct service to 3,172 individual residents. On average, residents participating in service coordination remain in their housing for more than six years.

For more information, see the attached LSS marketing materials, visit <https://www.lsswis.org> for an overview of experience and qualifications, and <https://www.lsswis.org/tag/award/> for recent awards.

Z. Complete the table for supportive units proposed:

% of County Median Income (CMI)	# of Bedrooms					
	Total # of Units	# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs
≤30%	36		15	14	7	
40%						
50%						
60%						

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

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

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

36 units (20.34%) shall be set-aside for individuals and families experiencing homelessness.

The targeted populations will have priority to other applicants when on the Waiting List. The project will hold open units for a minimum of 30 days or until local collaborative long term service partners, in conjunction with Property Management team, finds a person meeting the target at-risk definition and requisite income qualifications to lease the unit.

When available units cannot be filled from qualified individuals on the Waiting List after 30 days, the units may be leased to any otherwise income qualifying family or individual. Management will target advertising to groups other than the typical population of the neighborhood and will reach out to applicants who are least likely to apply. An affidavit will be executed and filed by Management in the tenant and property files attesting that the unit was marketed in accordance with the 30 day marketing period.

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

Lutheran Social Services (LSS) will provide a range of supportive services to targeted residents of the project, while also offering information on these services to all residents. A designated on-site LSS Service Coordinator will be responsible for connecting residents—particularly homeless individuals and families, and individuals with disabilities—to supportive, medical, and advocacy services within the broader community. The goal is to help tenants develop the skills necessary to maintain a stable and healthy lifestyle and remain independent in their housing.

LSS will work individually with residents to develop ongoing Supportive Services Plans tailored to each tenant's needs. These plans will be regularly reviewed through scheduled meetings with residents to ensure continuous engagement and successful completion of services. Where appropriate, LSS will provide follow-up and case management to sustain tenant progress and connection to resources.

LSS will have one to two service coordinators and an associated supervisor on-site between 40-48 hours a week (1.2 FTE) with virtual availability outside of on-site office hours. LSS will establish a regular schedule of on- or off-site plans to meet with tenants to ensure introduction to, on-going management of, and completion of supportive services programs. Residents will be made aware of the array of services available to them upon move in, or during their new resident orientation. Residents will also be reminded of service opportunities through resident newsletters, calendars, and flyers posted at mailboxes and near entry doors.

Supportive services may include, but are not limited to:

- Completion of an intake assessment by the Service Coordinator (with voluntary tenant participation).
- Development of a personalized case management plan, including referrals to community partners such as Dane County Health and Human Services, the Aging and Disability Resource Center, and workforce development programs.

- Coordination of on-site programming and workshops focused on overcoming personal and financial barriers, such as self-improvement and financial literacy.

Generally, LSS service coordinators act as investigators, educators, community builders, advocates, and service facilitators. Based on resident goals and interests, service coordinators also offer help in the following areas:

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

The project has budgeted these supportive services expenses as part of each project's operating budget.

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

LSS will actively collaborate with residents and Volker's property management team to promote housing stability and retention. This includes:

- Addressing lease violations, late payments, and developing corrective action plans.
- Facilitating maintenance and repair requests in coordination with management.
- Providing case management and support strategies aimed at resolving issues before they threaten housing stability.

Through this wraparound service model, LSS aims to equip families and individuals with the tools to strengthen family relationships, identify helpful community resources, and ultimately increase their length of tenancy. The partnership is designed to stabilize the property while supporting tenants in maintaining long-term housing.

See the memorandum of understanding between LSS and Volker, as well as LSS's supportive services plan for further details.

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

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

difficult conversations and conflict, grief, mediation and de-escalation. Refresher trainings in MI, TIC and Person Centered Planning are additionally provided on an ongoing basis. LSS also maintains a training platform within Essential Learning (Relias Learning). This online database provides many training opportunities for employees as assigned by their supervisor.

Additionally, LSS continually reviews opportunities for external trainings available, within budget limits, applicable to the Service Coordinator's role to provide opportunity for professional development and maintain awareness of local and state resources.

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

Services will be accessed by tenants and the surrounding community on-site in a designated space near the building's principal entrance on the corner of E Wash and N Fair Oaks Ave.

Residents will be also made aware of the array of services available to them upon move in, or during their new resident orientation. Residents will also be reminded of service opportunities through resident newsletters, calendars, email outreach, sign-up sheets and flyers posted at mailboxes and near entry doors.

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

If a service provider does refer a resident to another organization off-site for resources, residents will be provided referral information in a manner that is clear, informative and accessible. The referral (virtually, flyer, physical card, digital information, etc.) will not only include the support group's name, address, contract person, phone number, email, hours and website, but also will include instructions for accessing such service (how to register or make an appointment, what is needed from resident, how to get there, transportation options, etc.). Referral information will be provided in other language for limited English proficient individuals and in alternative formats for persons with disabilities.

Accompaniment services may also be available for the LSS service coordinator to accompany the resident at their first appointment at the off-site organization to provide support and ensure they feel comfortable.

Ongoing case management will ensure residents feel comfortable and capable utilizing off-site community support, leading to better outcomes and better services geared to each individual resident.

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

LSS intends on having one or two service coordinators on-site for about 56 hours per week, on site every day Monday - Friday. An assigned virtual service coordinator will also be available by telephone and email outside of the designated times.

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

With many existing supportive service programs and based on their longstanding reputation as a service provider of choice, their experience level and connectivity, LSS is already very connected with many community service providers in Madison and Dane County.

Whether that be through active participation in and attendance at the Dane County Continuum of Care meetings, LSS will go above and beyond to provide more than case management, counseling, mental health

services, etc. and is already collaborating with and utilizing local government agencies and government contacts to gain introductions to other community organizations.

Whether it is transportation, health care, substance abuse help, school supplies, educational or vocational resources, financial aid, legal assistance, employment assistance, access to other community organizations, service providers, public assistance programs, LSS is a service facilitator who is intending to provide tailored care to the needs of each resident and will research and seek collaboration with any other service provider in the area to allow the project's residents live comfortably and independently.

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

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

The proposed supportive services on site conducted by LSS will be directly paid by Volker as part of the project's direct operating expenses (above the line) starting at \$180,000 annually with annual escalations.

As part of the project's financing, a \$150,000 supportive housing reserve will be created, reserved for ongoing, annual supportive service expenses, to ensure adequate compensation and ongoing support for LSS that is independent of project's financial performance, in the event there are more services needed in a given year, etc..

In combination, the project will be contributing more than \$5,000 of supportive service assistance per 30% AMI unit, demonstrating its commitment to adequately fund and aid LSS's supportive service staff but also to assist, aid and lift up its targeted populations.

Please see attached for MOU between Volker and LSS, along with LSS' SSP

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

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

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

The approach for coordination between property management, service provider and the development team will go as follows:

Initial coordination meeting 6-9 months pre-CO to discuss lease-up process, identify general and target population waitlists, discuss referral and coordinate entry process, needed outreach to any organizations and community partners that haven't already been made.

During lease-up, the property management team, service provider and development team will have weekly meetings to discuss referrals and potential applicants that have been requested and provided from the coordinated entry housing priority list, rapid rehousing programs and other community based housing programs. Once prospective applicants are identified, the teams will collaborate on the status of the steps to ensure applications are completed, processed and approved in a timely manner until the supportive service units are filled with the target population.

Once units are leased, the calls will be tailored towards maintaining a successful service program and financially feasible project, to ensure successful resident relations are had and that any potential issues are identified and addressed to ensure the needs of the tenants are satisfied once moved-in (mental health services, addiction and recovery services, services for persons with disabilities, etc.).

Ongoing processes will be shared amongst team members, clear communication channels will be provided, ongoing reporting mechanisms will be established to share data and track the project's and service program's performance.

As experienced developers, property managers and service providers who have all gone through similar lease-ups and have successfully managed similar projects, we know that the more integration between teams, the better.

Please see the attached for Volker Development Experience - Project List for number of projects closed to date. This list includes each project's supportive housing set-asides and supportive service providers. There are 20+ projects with an element of supportive services which utilizes the aforementioned approach successfully. Half of those projects have veteran housing units and a number have supportive services provided by LSS. This project looks to continue an established supportive service program between Volker and LSS.

EXPERIENCE AND QUALIFICATIONS

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

Volker Development, Inc. was born in 2023 from over 20 years of development experience by Louie Lange, an industry-recognized affordable housing developer and Marine Corps veteran. Volker continues to be committed to excellence in providing the best housing options across diverse communities nationwide. The company was built to be nimble and responsive to current and rapidly changing market conditions, and now owns and operates more than 60+ LIHTC communities nationwide, with a majority of projects being in Wisconsin and financed by WHEDA.

Louie Lange previously founded The Commonwealth Companies in 2001 as a suite of vertically integrated real estate development, design, construction, and property management companies. Between 2001 and 2023 Commonwealth developed more than 100 affordable housing communities across the United States utilizing Section 42 tax credits. In 2023, Louie decided to sell his Commonwealth interests and reestablish his own company in the work that he is passionate about, though he retained 100% ownership interests to all projects developed prior to 2019. Volker launched with an experienced and cohesive leadership team on top of a stable portfolio of properties and proven reputation. Leadership's primary focus is to support and encourage its market leaders who are true local experts creating impactful housing opportunities.

Volker's mission is to provide high-quality affordable housing to better places and people. Playing a pivotal role in addressing the pressing need for accessible and low-cost housing options within communities. Volker works closely with local governments, non-profit organizations, and financial institutions, to implement innovative strategies that promote inclusivity and stability in housing markets.

Since last year's submission for Dane County funds, Volker successfully closed on its first affordable housing project in Dane County with an AHDF - Kelly Station - which will deliver 76 much needed affordable housing units within Madison, WI. Since last year's Dane County AHDF application cycle, Volker successfully closed on its first affordable housing project in Dane County with an AHDF award - Kelly Station Apartments - which will deliver 76 much needed affordable housing units within Madison, WI. Additionally, in the last several months, Volker has closed on three additional LIHTC projects, starting construction on another 128 units of high-quality affordable housing throughout the Country, and has also received two additional 9% LIHTC awards, one in Michigan and one Colorado.

See attached for Volker Development Experience - Project List for an updated number of projects closed to date. This list includes the unit count, location, project and financing type, along with the soft funds utilized, supportive housing set-asides, supportive service providers and joint ventures (if applicable).

LSS has also proudly served the subsidized and affordable housing market for more than 30 years. LSS owns and manages more than 30 subsidized communities, totaling more than 425 units. Offered in cooperation with the U.S. Department of Housing and Urban Development (HUD), and similar to Volker, LSS' developments provide safe, decent and affordable housing for older adults, and persons with developmental disabilities, chronic mental illness, or physical disabilities. LSS has several LIHTC communities in Wisconsin financed by WHEDA tax credits and has partnered some other large national developers to develop, manage and provide services to affordable housing projects all over Wisconsin

LSS has successfully partnered in the above capacities with the following developers:

Herman and Kittle Properties
TW Sather Company
Gorman and Company
Commonwealth Development
Crown Court Properties

Active Developments include:

Pebble Ridge Apartments – Antigo, WI
Jackson Square Apartments – Oshkosh, WI
Croft Place Apartments – New Richmond, WI
Haymarket Lofts – Milwaukee, WI

Tennyson Ridge Apartments – Madison, WI
Union Square Apartments – Appleton, WI
Historic School Apartments – Schofield, WI
Union Corners – Madison, WI
5th Street School Apartments – Milwaukee, WI
Washington School Apartments – Sheboygan, WI

Laslty, Volker and LSS will be partnering with Gabe Fritz, an emerging, BIPOC, developer who has recently started a development company called Edfici (Edfici, LLC). With more than 24 years of experience in the affordable housing industry, Gabe has led development efforts across nonprofit, government, and for-profit sectors.

He began his career as a Neighborhood Revitalization Coordinator and Project Manager at a mission-driven nonprofit, later taking on the role of Development and Marketing Director for a private single-family development firm. He went on to serve as Director of the Office of Housing and Community Development for Louisville Metro Government, where he managed HUD funding programs—including HOME, CDBG, and HOPWA—and created an innovative revolving loan fund that helped finance thousands of affordable units. Most recently, he rejoined the nonprofit where his career began, now serving as Vice President and COO.

Over the course of his career, he has led a wide range of development projects, including the adaptive reuse of schools, hospitals, and industrial buildings into affordable multifamily housing using federal and state historic tax credits. His portfolio includes both greenfield and brownfield new construction, recapitalization of existing assets, and developments financed through 9% LIHTC and USDA Rural Development programs. He brings a strong understanding of supportive housing models, having served on multiple nonprofit boards where he contributed his development expertise to the creation of permanent supportive housing with on-site wraparound services.

He is a BIPOC, approved Emerging Developer and currently serves as co-developer and co-managing member of the Lexington School project in Grand Rapids, a 39-unit LIHTC-funded adaptive reuse project for seniors. This project reflects his long-term goal of continuing to own and manage affordable housing communities, especially in midwest, where he has deep family ties and longstanding community connections.

As the sole member of Edifici, his development entity, he remains committed to producing high-quality, service-enriched affordable housing across the midwest, with a focus on future partnerships that build long-term impact.

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

Founded by Louie Lange in 2001 in Fond du Lac, WI, Volker Management has provided property management services to high-quality, affordable multifamily and senior residential and commercial real estate owners and investors for over 20 years. Services include full service on-site property management, lease-up campaign expertise, compliance, asset management services, rehabilitation and re-positioning of real estate assets. Volker Management currently manages 40 affordable multifamily projects located in Wisconsin & across the county, that are owned by it's affiliate, Volker Legacy Holdings, Inc.,

Managing our own affordable housing communities offers numerous benefits that directly impact the well-being of residents and the overall success of our developments. By taking full control of the management process, Volker ensures a higher level of accountability, responsiveness, and efficiency in meeting the needs of our residents and the expectations of all stakeholders and project partners.

This hands-on approach allows for better control and to maintain a direct line of communication with tenants, promptly address maintenance issues, and implement community-driven initiatives that foster a sense of belonging and pride.

While Volker does not currently own and manage any affordable housing projects in Dane County (one project is intended to be managed but is currently under construction), Volker Management has developed a strong core infrastructure and regional presence, enabling us to respond to needs quickly and efficiently, as well as effectively manage portfolios with assets in multiple areas.

Volker Management's experienced management team create value through day to day supervision and long-term strategic planning. They analyze market trends to determine how to effectively position a property within a given market, then develop a custom marketing, leasing and management strategy to maximize its potential value.

Please see Volker - List of Properties Managed for the unit count, location and asset type of each property currently being managed by Volker.

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

N/A

PROJECT FINANCING

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

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

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

SOURCE	AMOUNT
Federal LIHTC Investor Equity	\$22,801,126
First Mortgage	\$25,414,000
Solar Tax Credit Equity	\$180,462
WHEDA IAL Loan (IAL)	\$650,000
Deferred Developer Fee	\$6,504,312

USES	AMOUNT
Land & Buildings	4,250,000
Construction Cost & Contingency	\$42,037,600
Solar	\$752,000
Design & Engineering	\$2,029,540
Professional Fees	\$145,000

GP/SLP Equity	\$100
Dane County AHDF	\$5,500,000
City of Madison AHF	\$2,500,000
TOTAL	\$63,550,000

Construction & Permanent Financing Costs	\$3,715,467
Other Soft Costs	\$299,021
Tax Credit Fees	\$151,000
Developer Fee	\$8,500,000
Development Reserves	\$1,670,438
TOTAL	\$63,550,000

NN. Which of the identified sources have been secured?

The following sources of financing have been secured ahead of this project's application submission:

LIHTC and Solar Tax Credit Equity Commitments
GP (Owner) Equity
Construction and Permanent Financing Commitments
Deferred Development Fee

Volker will be applying for WHEDA's infrastructure access loan award in the fall to help subsidize some infrastructure improvements that are required by City, but is otherwise ready to proceed outside of City and County gap financing awards.

(The plan is to have this financed by WHEDA 4% noncompetitive tax credits and do not depend on a competitive State LIHTC award or a 9% LIHTC award).

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

The project will be applying for tax-exempt bonds and WHEDA 4% low income housing tax credits (LIHTC) this month, August 2025.

If a gap in the project exists (if local soft funds are not awarded), the project will be applying for 2026 WHEDA state low-income housing tax credits in December for an award in March 2026.

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

The AHDF funds are needed to bring this project to fruition, as the income generated by the rent- and income-restricted housing project are not otherwise able to support enough debt and tax credit equity to cover construction and operational costs.

This is due to: deep set-asides providing housing for very-low-income individuals and families, the construction costs associated with townhomes, providing an energy efficient, amenitized building, large 376 kW PV system, consisting of an estimated 855 solar panels, high operating expenses to support full-time, on-site property management staff and a full-time and part-time supportive service provider.

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

OPERATING BUDGET

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
INCOME										
Gross Potential Rent										
Vacancy										
Other Income										
Total Income										
OPERATING EXPENSES										
Marketing										
Payroll										
Other Administrative Costs										
Management Fees										
Utilities										
Security										
Maintenance Expenses										
Property Taxes										
Supportive Services										
Insurance										
Reserves for Replacement										
Total Operating Expenses										
Net Operating Income										
Debt Service										
Asset Management										
Cash Flow										
	Year 11	Year 12	Year 13	Year 14	Year 15	Year 16	Year 17	Year 18	Year 19	Year 20
INCOME										
Gross Potential Rent										
Vacancy										
Other Income										
Total Income										
OPERATING EXPENSES										
Marketing										
Payroll										

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

Fair Oaks Operating Budget																				
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15	Year 16	Year 17	Year 18	Year 19	Year 20
Revenue																				
Gross Potential Revenue	\$ 3,196,633	\$ 3,260,566	\$ 3,325,777	\$ 3,392,293	\$ 3,460,139	\$ 3,529,341	\$ 3,599,928	\$ 3,671,927	\$ 3,745,365	\$ 3,820,273	\$ 3,896,678	\$ 3,974,612	\$ 4,054,104	\$ 4,135,186	\$ 4,217,890	\$ 4,302,247	\$ 4,388,292	\$ 4,476,058	\$ 4,565,579	\$ 4,656,891
Less: Vacancy	(170,415)	(173,823)	(177,300)	(180,846)	(184,463)	(188,152)	(191,915)	(195,753)	(199,668)	(203,662)	(207,735)	(211,890)	(216,127)	(220,450)	(224,859)	(229,356)	(233,943)	(238,622)	(243,394)	(248,262)
Other Income	211,666	215,899	220,217	224,621	229,114	233,696	238,370	243,137	248,000	252,960	258,019	263,179	268,443	273,812	279,288	284,874	290,571	296,383	302,310	308,357
Total Income	\$ 3,237,884	\$ 3,302,641	\$ 3,368,694	\$ 3,436,068	\$ 3,504,790	\$ 3,574,885	\$ 3,646,383	\$ 3,719,311	\$ 3,793,697	\$ 3,869,571	\$ 3,946,962	\$ 4,025,901	\$ 4,106,420	\$ 4,188,548	\$ 4,272,319	\$ 4,357,765	\$ 4,444,921	\$ 4,533,819	\$ 4,624,495	\$ 4,716,985
Operating Expenses																				
Marketing	8,850	9,116	9,389	9,671	9,961	10,260	10,567	10,884	11,211	11,547	11,894	12,250	12,618	12,997	13,386	13,788	14,202	14,628	15,067	15,519
Payroll	220,500	227,115	233,928	240,946	248,175	255,620	263,289	271,187	279,323	287,702	296,334	305,224	314,380	323,812	333,526	343,532	353,838	364,453	375,386	386,648
Other Administrative Costs	58,850	60,616	62,434	64,307	66,236	68,223	70,270	72,378	74,549	76,786	79,089	81,462	83,906	86,423	89,016	91,686	94,437	97,270	100,188	103,194
Management Fees	161,894	166,751	171,754	176,906	182,213	187,680	193,310	199,109	205,083	211,235	217,572	224,099	230,822	237,747	244,879	252,226	259,793	267,586	275,614	283,882
Utilities	79,650	82,040	84,501	87,036	89,647	92,336	95,106	97,959	100,898	103,925	107,043	110,254	113,562	116,969	120,478	124,092	127,815	131,649	135,599	139,667
Security	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Maintenance Expenses	132,750	136,733	140,834	145,060	149,411	153,894	158,510	163,266	168,164	173,209	178,405	183,757	189,270	194,948	200,796	206,820	213,025	219,416	225,998	232,778
Property Taxes	327,450	337,274	347,392	357,813	368,548	379,604	390,992	402,722	414,804	427,248	440,065	453,267	466,865	480,871	495,298	510,156	525,461	541,225	557,462	574,186
Supportive Services	180,000	185,400	190,962	196,691	202,592	208,669	214,929	221,377	228,019	234,859	241,905	249,162	256,637	264,336	272,266	280,434	288,847	297,513	306,438	315,631
Insurance	97,350	100,271	103,279	106,377	109,568	112,855	116,241	119,728	123,320	127,020	130,830	134,755	138,798	142,962	147,251	151,668	156,218	160,905	165,732	170,704
Reserves for Replacement	53,100	54,693	56,334	58,024	59,765	61,557	63,404	65,306	67,265	69,283	71,362	73,503	75,708	77,979	80,319	82,728	85,210	87,766	90,399	93,111
Total Operating Expenses	\$ 1,320,394	\$ 1,360,006	\$ 1,400,806	\$ 1,442,830	\$ 1,486,115	\$ 1,530,699	\$ 1,576,620	\$ 1,623,918	\$ 1,672,636	\$ 1,722,815	\$ 1,774,499	\$ 1,827,734	\$ 1,882,566	\$ 1,939,043	\$ 1,997,215	\$ 2,057,131	\$ 2,118,845	\$ 2,182,410	\$ 2,247,883	\$ 2,315,319
Net Operating Income	\$ 1,917,490	\$ 1,942,635	\$ 1,967,888	\$ 1,993,238	\$ 2,018,674	\$ 2,044,187	\$ 2,069,763	\$ 2,095,392	\$ 2,121,061	\$ 2,146,756	\$ 2,172,463	\$ 2,198,167	\$ 2,223,853	\$ 2,249,505	\$ 2,275,104	\$ 2,300,634	\$ 2,326,075	\$ 2,351,409	\$ 2,376,613	\$ 2,401,666
Debt Service: First Mortgage Loan	\$ 1,540,056	\$ 1,540,056	\$ 1,540,056	\$ 1,540,056	\$ 1,540,056	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281	\$ 1,695,281
Asset Management Fee	\$ 12,500	\$ 12,875	\$ 13,261	\$ 13,659	\$ 14,069	\$ 14,491	\$ 14,926	\$ 15,373	\$ 15,835	\$ 16,310	\$ 16,799	\$ 17,303	\$ 17,822	\$ 18,357	\$ 18,907	\$ 19,475	\$ 20,059	\$ 20,661	\$ 21,280	\$ 21,919
Cash Flow Available	\$ 364,934	\$ 389,705	\$ 414,571	\$ 439,523	\$ 464,550	\$ 334,415	\$ 359,557	\$ 384,738	\$ 409,945	\$ 435,165	\$ 460,383	\$ 485,583	\$ 510,750	\$ 535,867	\$ 560,916	\$ 585,879	\$ 610,736	\$ 635,467	\$ 660,051	\$ 684,466



Signed letter from designated property management partner that acknowledges their understanding of any lease addendum items the developer is agreeing to in their application

VÖLKER

July 29, 2025

Jenna Wuthrich
Housing Program Specialist
Dane County Department of Human Services
608-242-6454
wuthrich@countyofdane.com

RE: Dane County Affordable Housing Development Fund application – Volker and LSS -
Madison 4% (Fair Oaks)

Please use this letter as a commitment to offer property management services for the proposed project and an acknowledgement of the selected tenancy selection criteria and lease addendum items described in the aforementioned project's application to the Dane County 2025 Affordable Housing Development Fund .

Please also use this letter as confirmation that leases will incorporate the provisions of the Dane County Tenancy Addendum into all tenant leases or as an addendum to all tenant leases.

Thank you,
Volker Legacy Holdings, Inc. (Proposed Property Management Firm)

By: _____

Name: Adam Hanson

Title: Authorized Agent



Signed letter from designated property management partner that acknowledges their understanding of any selected tenancy selection criteria in the project application.

VÖLKER

July 29, 2025

Jenna Wuthrich
Housing Program Specialist
Dane County Department of Human Services
608-242-6454
wuthrich@countyofdane.com

RE: Dane County Affordable Housing Development Fund application – Volker and LSS -
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Thank you,
Volker Legacy Holdings, Inc. (Proposed Property Management Firm)

By: _____

Name: Adam Hanson

Title: Authorized Agent



**Signed letter(s) from designated
supportive services partner(s)
confirming the details of the
application's commitment to end
homelessness and the application's
proposed supportive service plan**

Population Served

All residents of Volker's Fair Oaks project will be given information on the services offered. A wide variety of services will be offered that will meet the needs of families with preference to individuals residing at the targeted set aside units, including those meeting the definition of homelessness, referred from the homeless prioritization list.

There will be 36 Supportive Housing Units (20% of total units), restricted at 30% AMI that will be set aside for individuals and families experiencing homelessness. The supportive housing units will be distributed as follows:

One Bedroom – One Bathroom

- 15 units – 30% AMI – Individuals and families experiencing or at-risk of homelessness

Two Bedroom – Two Bathroom

- 14 units – 30% AMI – Individuals and families experiencing or at-risk of homelessness

Three Bedroom – Two Bathroom

- 7 units – 30% AMI – Individuals and families experiencing or at-risk of homelessness

Onsite service provision will be provided by Lutheran Social Services of Wisconsin & Upper Michigan, Inc. (LSS). The responsibilities associated with the coordination of services are estimated to be full-time, averaging 56 hours per week. In addition to onsite supportive services, LSS will coordinate directly with Institute for Community Alliances-Wisconsin to obtain referrals of individuals currently listed on the homelessness prioritization list. From this list of referrals, LSS will engage with individuals to identify potential tenants interested in residency at Volker's Fair Oaks development and make associated referrals to the Project's management team.

Supportive Services

Volker is partnering with Lutheran Social Services (LSS) to provide a variety of supportive services to the targeted residents of the Fair Oaks project. Tenants will have access to the help they need through an LSS Service Coordinator who will help to address their specific challenges, and arrange services, that they may learn the skills necessary to develop and maintain a healthy, stable lifestyle. A designated Service Coordinator will be responsible for linking the target population at the site with supportive, medical or advocacy services in the general community for which they are entitled, with a desired outcome of keeping them independent in their units.

LSS will be on-site and will work with residents to identify funding sources and develop an on-going Supportive Services Plan, based on needs of the tenants, to ensure supportive services are made available to the tenants at the Project. LSS will establish a regular schedule of on or off-site plans to meet with tenants to ensure introduction to, on-going management of, and completion of supportive services programs. Residents will be made aware of the array of services available to them upon move in, or during their new resident orientation. Residents will also be reminded of service opportunities through resident newsletters, calendars, and flyers posted at mailboxes and near entry doors. Services offered by the LSS Service Coordinator are voluntary to all residents at Volker's project. LSS will establish a regular schedule of on or off-site plans to meet with the tenants to ensure introduction to, on-going management of, and completion of supportive services programs.

These services may include, but are not limited to, the following:

- Completion of an intake assessment by the Service coordinator. It is understood and agreed that the resident has to voluntarily agree to participation in the process.
- Development of a case management plan. This plan may include referral to other resources, including, Dane County Department of Health and Human Services, the Aging and Disability Resource Center, workforce development, and other community supports.
- Coordination of onsite programming and/or workshops to assist residents in overcoming barriers as identified on the tenant assessments. Potential sessions include self-improvement, employment opportunities and financial management.

The goal of the Service Coordinator is to enhance the success of each resident served, to promote their ability to remain a tenant at Volker's project. The services identified above will work to enhance the resident's housing success and promote dignity of residents by addressing needs with a one-on-one approach. LSS's approach will include ongoing follow-up and case management where needed. Through provision of the wrap around service model, families and individuals at Volker's project will have the tools necessary to strengthen family relations, identify necessary and beneficial resources, and positively impact their length of tenancy in this community.

Lutheran Social Services' Experience with Providing Supportive Services

Lutheran Social Services of Wisconsin & Upper Michigan, Inc. provides a multitude of services including but not limited to the following services:

- Services to promote the well-being of children and families.
- Quality mental health services for people of all ages.
- Innovative services for older adults and their family caregivers.
- Comprehensive addiction and recovery services. Our programs work in partnership with most.
- Wisconsin counties, the Department of Health Services, and state and federal corrections departments.
- LSS operates multiple subsidized housing apartment buildings for older adults, persons with developmental disabilities, persons with chronic mental illness, and persons with physical disabilities.
- Services for persons with disabilities, including support and supervision within more independent living situations and support to learn skills in order to remain independent.
- Services aimed at organizing communities to better provide individuals with their most basic needs of shelter, food, clothing, hope and connection with the ultimate goal to alleviate the conditions associated with poverty, homelessness, disaster and isolation.

Traditional service provision through LSS has long included services to individuals experiencing homelessness.

Current LSS programs known to include disabled individuals as participants/service recipients include:

- HUD Housing and HUD and Tax Credit Housing Service Coordination

- Off the Square Club- a daytime drop in center for people with serious and persistent mental illness as well as homelessness. Emotional support, vocational and recreational opportunities, and structuring of individual schedules are available.
- Rapid Rehousing and Housing First programming in Dane, Waukesha and Racine counties in Wisconsin, and several counties in the Upper Peninsula in Michigan. Including active participation in and attendance at the Dane County Continuum of Care meetings, as well as the Veterans Committee on Homelessness.
- Veterans Housing and Recovery Programming - residential facilities for homeless veterans to receive the job training, education, counseling and rehabilitative services they need to obtain steady employment, affordable housing and the skills to sustain a productive lifestyle
- Outpatient Treatment Services- intensive outpatient treatment for adults and adolescents dealing with addiction.
- Quality Mental Health clinics and services
- Comprehensive addiction and recovery services. Our programs work in partnership with most Wisconsin counties, the Department of Health Services, and the state and federal corrections departments.
- Community Supported Living and Support Brokering for older adults and individuals with disabilities

VOLKER DEVELOPMENT INC.

LUTHERAN SOCIAL SERVICES OF
WISCONSIN AND UPPER MICHIGAN,
INC.

By: David Ritchay 8/1/2025
David Ritchay, Chief Development Officer

By:  8/1/2025
Dennis Hanson, Vice President

Memorandum of Understanding For
Volker 4% - Fair Oaks
Madison, WI

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

Scope of Services:

LSS will provide Service Coordination services to target the tenants (homeless and disabled individuals and families) residing in the project's 36 30% AMI units, who require and request access to supportive services to maintain housing. A designated Service Coordinator will be responsible for linking the target population at the site with supportive, medical or advocacy services in the general community for which they are entitled, with a desired outcome of keeping the tenant housed in their unit. Specific services to be offered under this agreement include:

- Established open office hours onsite at Volker's project to conduct individual, one-to-one supportive services meetings. Services will be targeted to the tenants residing in the project's 30% set aside units. The Service Coordinator will also provide coordination of educational programs and workshops, wellness activities and other ongoing programming to be available to residents onsite. Potential sessions include self-improvement, employment opportunities and financial management.
- Completion of an intake assessment for residents. The Service Coordinator will make reasonable effort to engage residents in this process. It is understood and agreed that the tenant has to voluntarily agree to participation in the process.
- Development of a case management plan for residents completing the intake assessment. This plan may include referral to other resources, including services and resources specific to their needs. This will include linking residents with programs that support independence and self-sufficiency, employment opportunities and financial assistance and management.
- Outreach to tenants at the project, to market and encourage engagement in the Supportive Services program. The onsite Service Coordinator will provide brochures and maintain a local resource directory of community services and benefit programs available to tenants. Information will be available and posted in communal areas at the property, and as applicable through door-to-door distributions. In addition, the Service Coordinator will maintain a recurring newsletter to inform residents of the services and schedule of programming each month.
- The Service Coordinator is identified as part of the project's management team. Programming and supportive services for the project will be done through:
 - Site visits by the assigned Service Coordinator during the pre-lease up phase of the development, and attendance at recurring lease up coordination meetings with the property management and development team. After lease-up, the assigned Service Coordinator will provide supportive services onsite (estimated to be about 56 hours per week) for the term of this agreement. An assigned service coordinator will also be available by telephone and email outside of the designated times above.
 - Participation and engagement in ongoing site team meetings. These meetings will provide general property updates, concerns related to resident health and safety, information on lease violation notices provided to residents, and additional topics as needed where the onsite service coordinator can be of support.

In addition, LSS agrees to assist the property management group in outreach efforts with community partners to raise awareness of this unique opportunity with the target population. LSS will work with the management company to market the set aside units to the target population including individuals experiencing homelessness off the Coordinated Entry list. LSS will refer clients from Dane County's Coordinated Entry list and/or LSS's Dane County Homelessness's programs to Volker's project during lease up. Thereafter, Volker's property management team will inform LSS of any open set aside units to refer applicable clients to the property.

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

Annual Budget

The estimated fee for providing Service Coordination as above is \$180,000 for Year 1 of services, thereafter a 3% annual cost of living adjustment will be added to the prior year's annual contracted rate through the length of the project compliance period. These amounts will be paid by Developer to LSS commencing with certificate of occupancy for the named project, and annually thereafter through completion of the compliance period, as indicated above, on the anniversary of initial certification of occupancy.

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

VOLKER DEVELOPMENT INC.

By: David Ritchay

Date: 8/1/2025

LUTHERAN SOCIAL SERVICES OF WI AND UPPER MI

By: Dennis Hanson

Date: 8/1/2025

Dennis Hanson, Vice President



**Certification of registration for any
selected green energies/sustainability
certification**

VÖLKER

July 29, 2025

Jenna Wuthrich
Housing Program Specialist
Dane County Department of Human Services
608-242-6454
wuthrich@countyofdane.com

RE: Dane County Affordable Housing Development Fund application – Volker and LSS -
Madison 4% (Fair Oaks)

Please use this letter as a commitment to pursue and obtain the following green technologies, sustainability standards and certifications for the project:

Tier One - Wisconsin Green Built Communities Gold Plus (New Construction)

Thank you,
Volker Development Inc.

By: _____

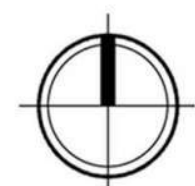


Name: Adam Hanson

Title: Authorized Agent



Site Plan and Building Plans



Locator Map

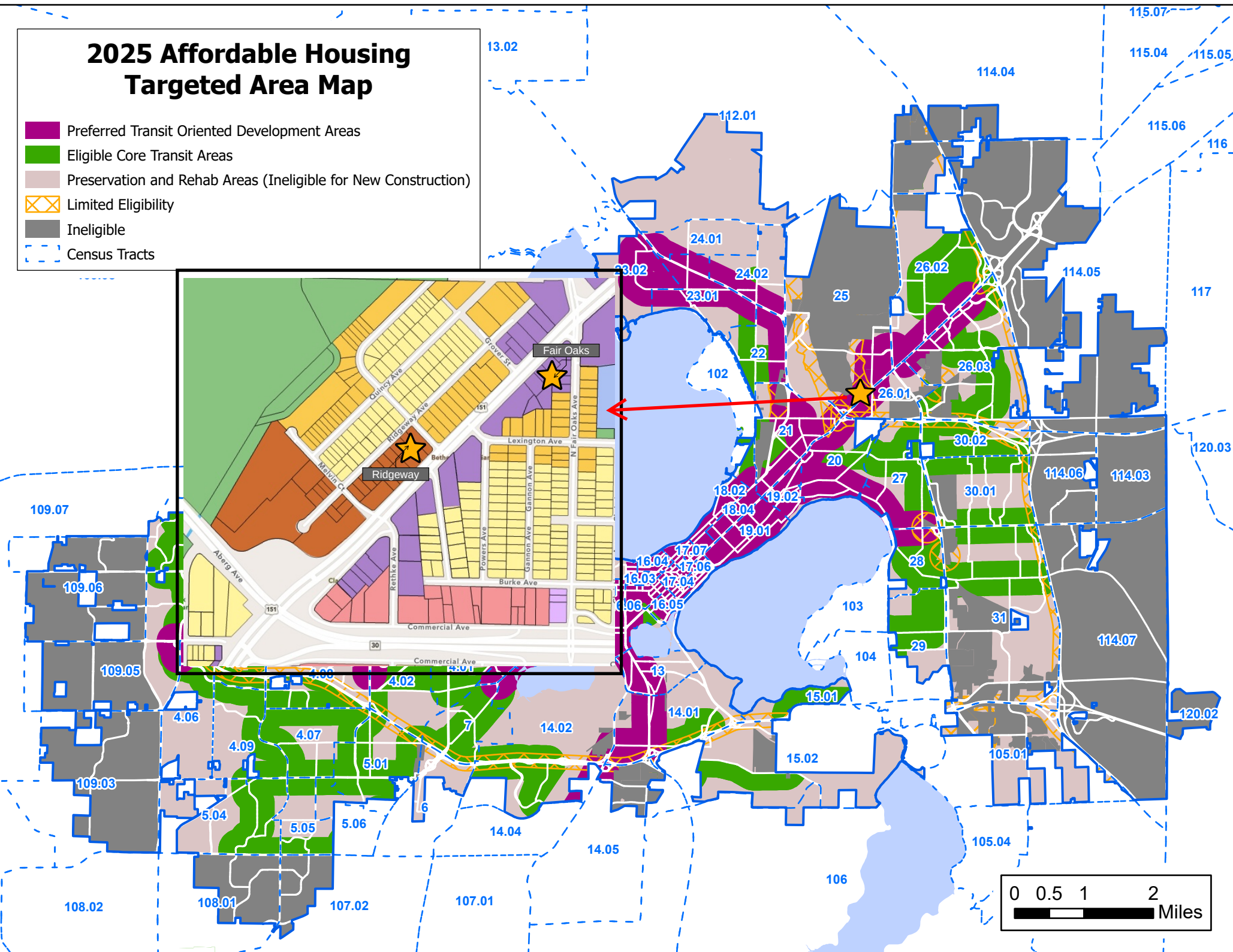
Mixed-Use Redevelopment
3357-3375 E. Washington Ave. & 922-930 N. Fair Oaks Ave., Madison, WI

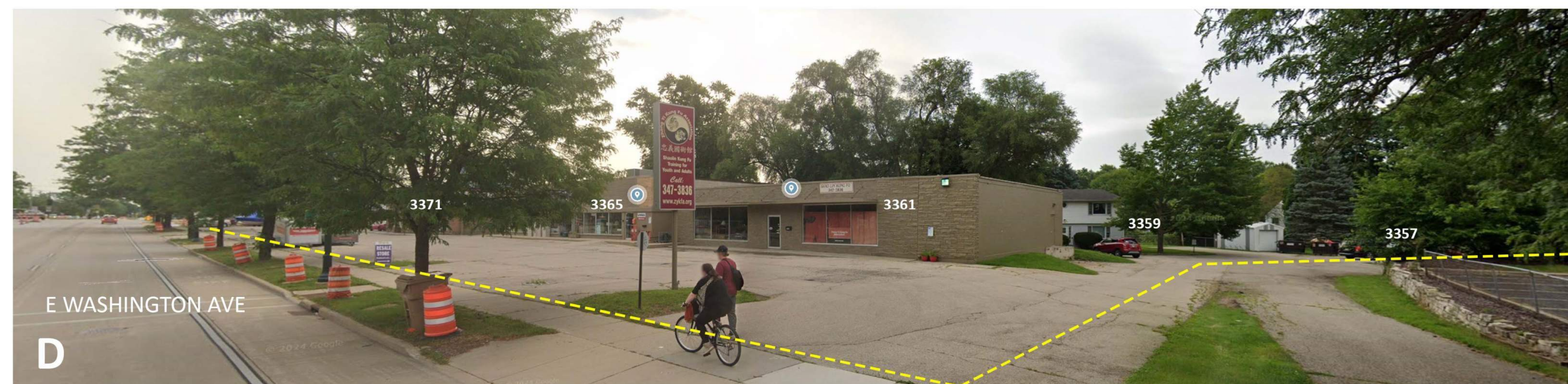
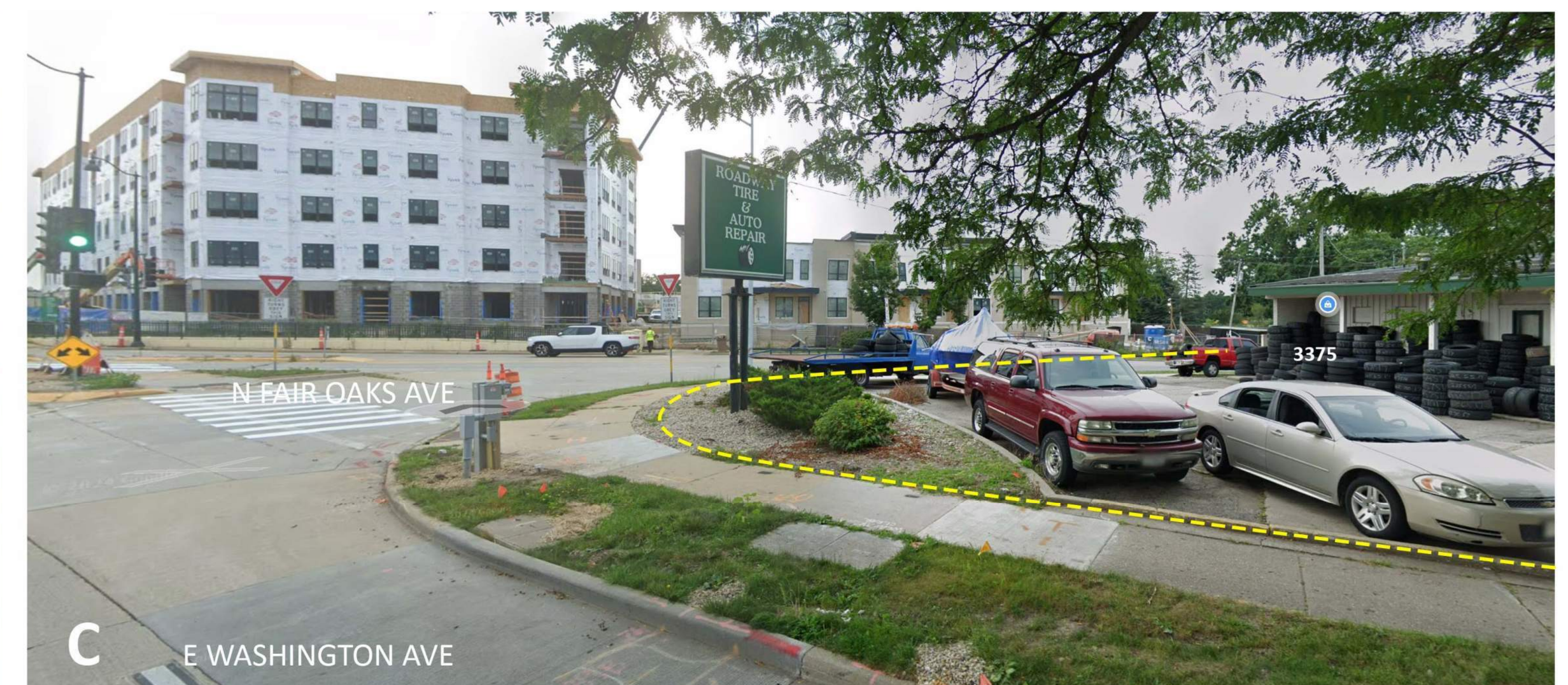
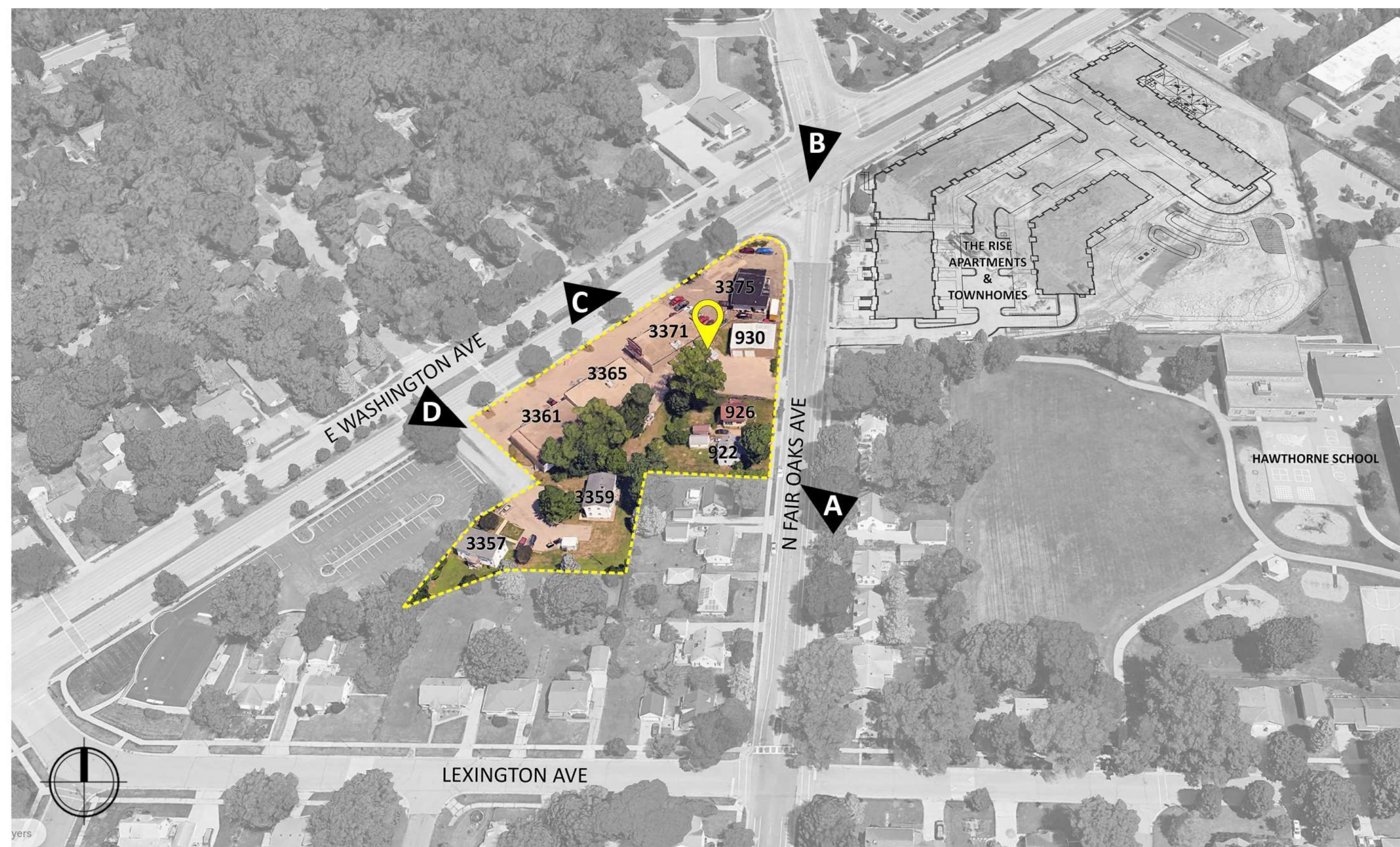
UDC FINAL PRESENTATION | 2025.07.30 | 2439



2025 Affordable Housing Targeted Area Map

- Preferred Transit Oriented Development Areas
- Eligible Core Transit Areas
- Preservation and Rehab Areas (Ineligible for New Construction)
- Limited Eligibility
- Ineligible
- Census Tracts





Context Photos

3357-3375 E. Washington Ave. & 922-930 N. Fair Oaks Ave., Madison, WI

Mixed-Use Redevelopment

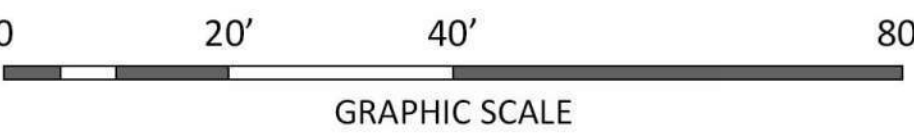
UDC FINAL PRESENTATION | 2025.07.30 | 2439

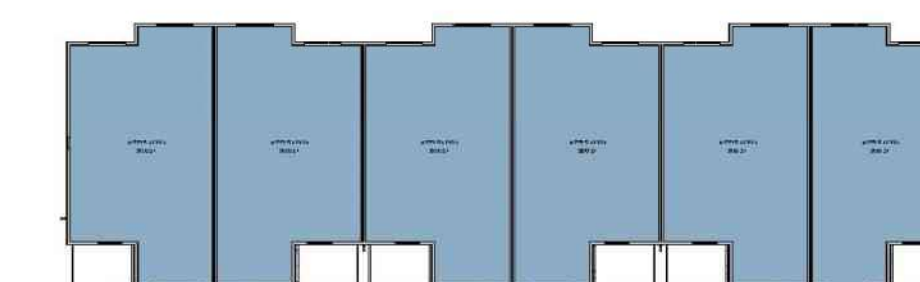
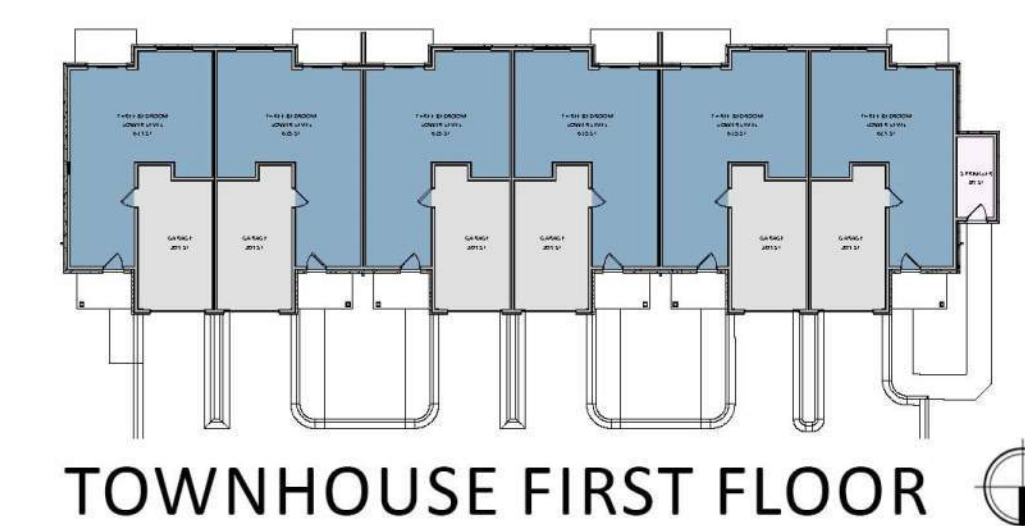
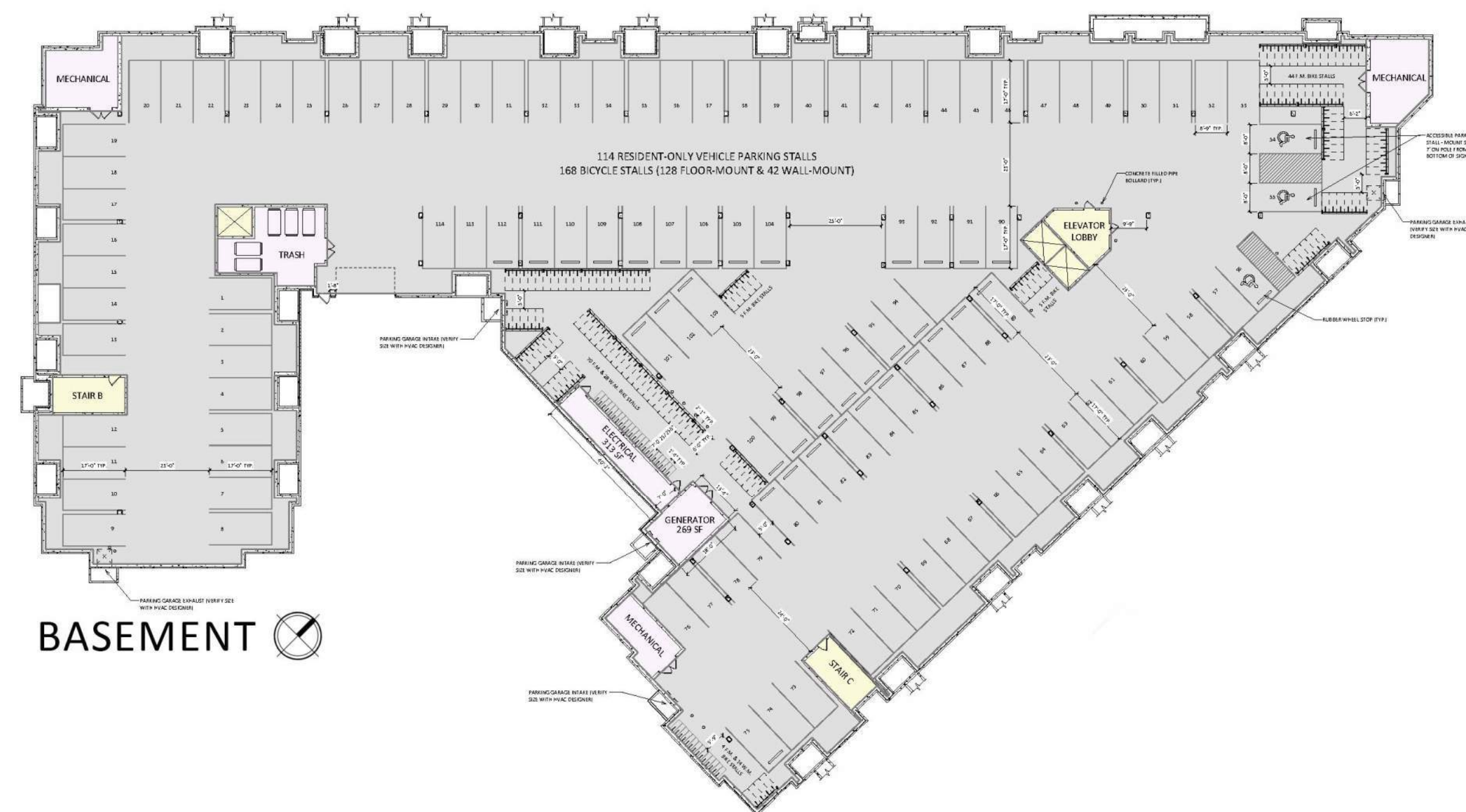




Site Plan

Mixed-Use Redevelopment
3357-3375 E. Washington Ave. & 922-930 N. Fair Oaks Ave., Madison, WI
UDC FINAL PRESENTATION | 2025.07.30 | 2439



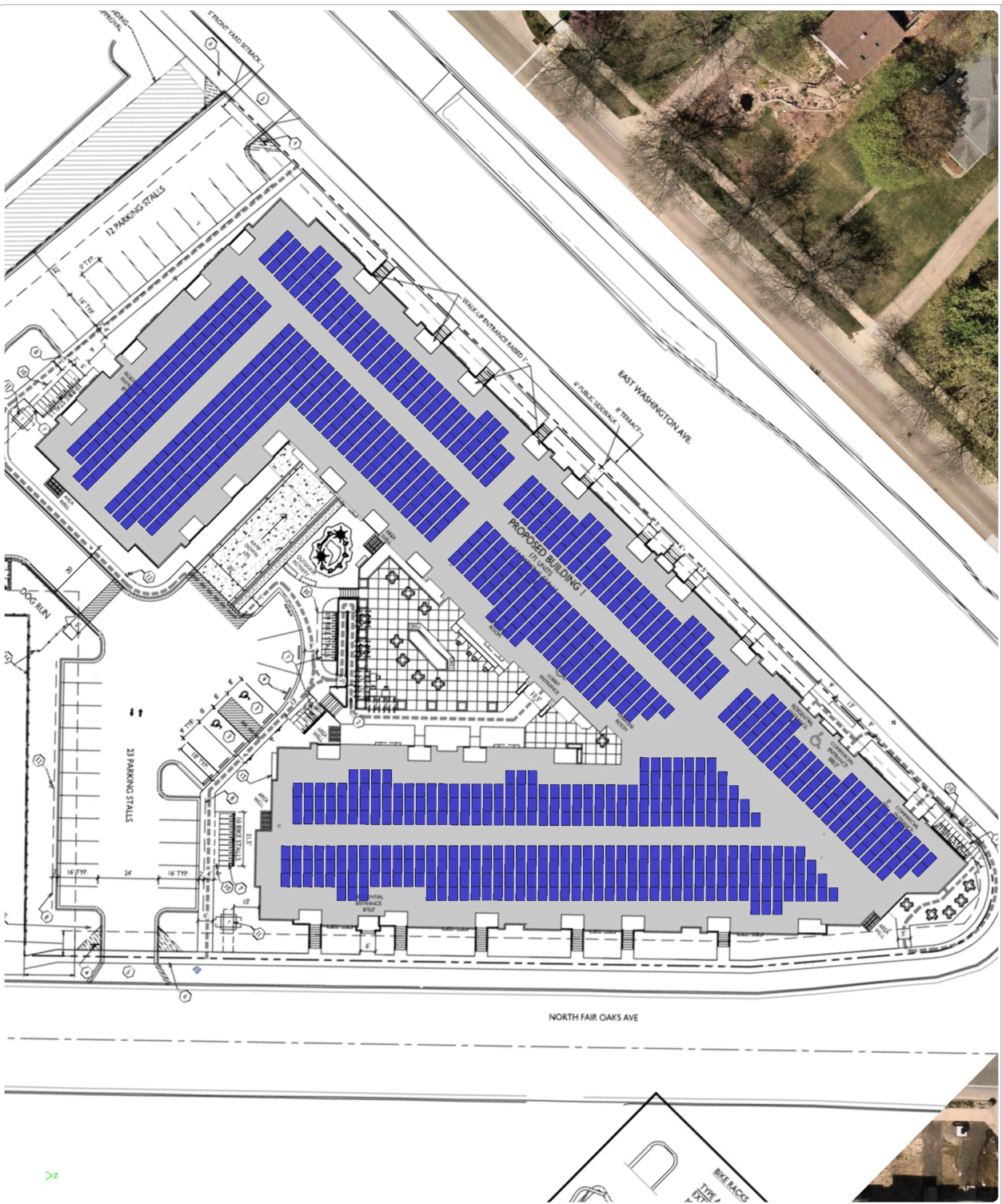


LEGEND

	CIRCULATION
	AMENITY - LEISURE
	1 BEDROOM
	2 BEDROOM
	3 BEDROOM
	STORAGE
	PARKING
	UTILITY
	COMMERCIAL

Floor Plans

Mixed-Use Redevelopment
3357-3375 E. Washington Ave. & 922-930 N. Fair Oaks Ave., Madison, WI





NORTHWEST ELEVATION ALONG E. WASHINGTON AVE.



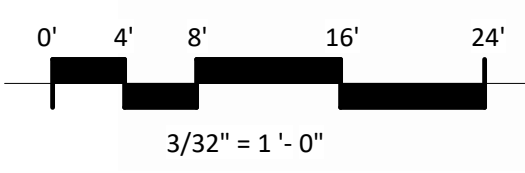
NORTHEAST ELEVATION AT CORNER



EAST ELEVATION ALONG N. FAIR OAKS AVE.



SOUTHWEST ELEVATION



EXTERIOR MATERIAL SCHEDULE			
MARK	BUILDING ELEMENT	MANUFACTURER	COLOR
01	COMPOSITE LAP SIDING 6" EXPOSURE	JAMES HARDIE	AGED PEWTER
02	COMPOSITE LAP SIDING 6" EXPOSURE	JAMES HARDIE	RICH ESPRESSO
03	COMPOSITE PANEL	TBD	SW6629 JALAPENO
04	COMPOSITE PANEL	TBD	SW6670 GOLD CREST
05	COMPOSITE PANEL	TBD	WHITE
06	COMPOSITE TRIM	JAMES HARDIE	MATCH ADJ. MATERIAL
07	BRICK VENEER	SUMMIT BRICK	EBONY
08	CAST STONE	ROCKCAST	SMOKEHOUSE
09	RAILINGS & HANDRAILS	SUPERIOR	BLACK
10	COMPOSITE WINDOW	ANDERSEN	BLACK
11	ALUMINIUM STOREFRONT	KAWNEER	BLACK



SOUTH ELEVATION



INTERIOR EAST ELEVATION



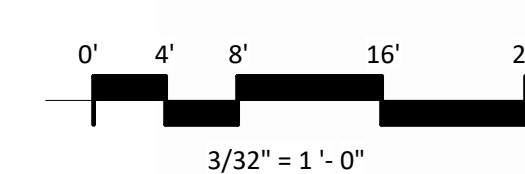
INTERIOR NORTHWEST ELEVATION



INTERIOR SOUTHWEST ELEVATION



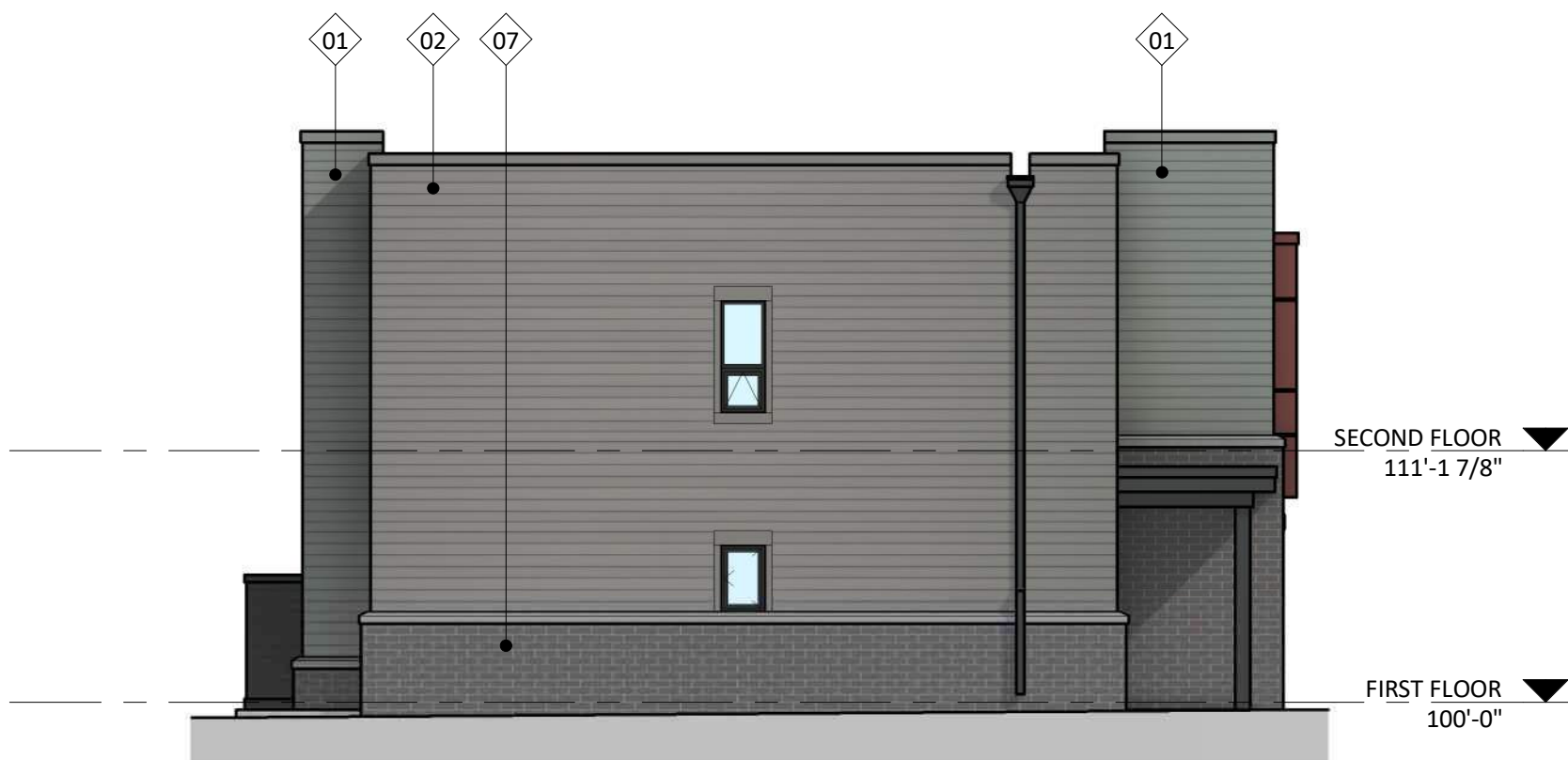
SOUTHEAST ELEVATION



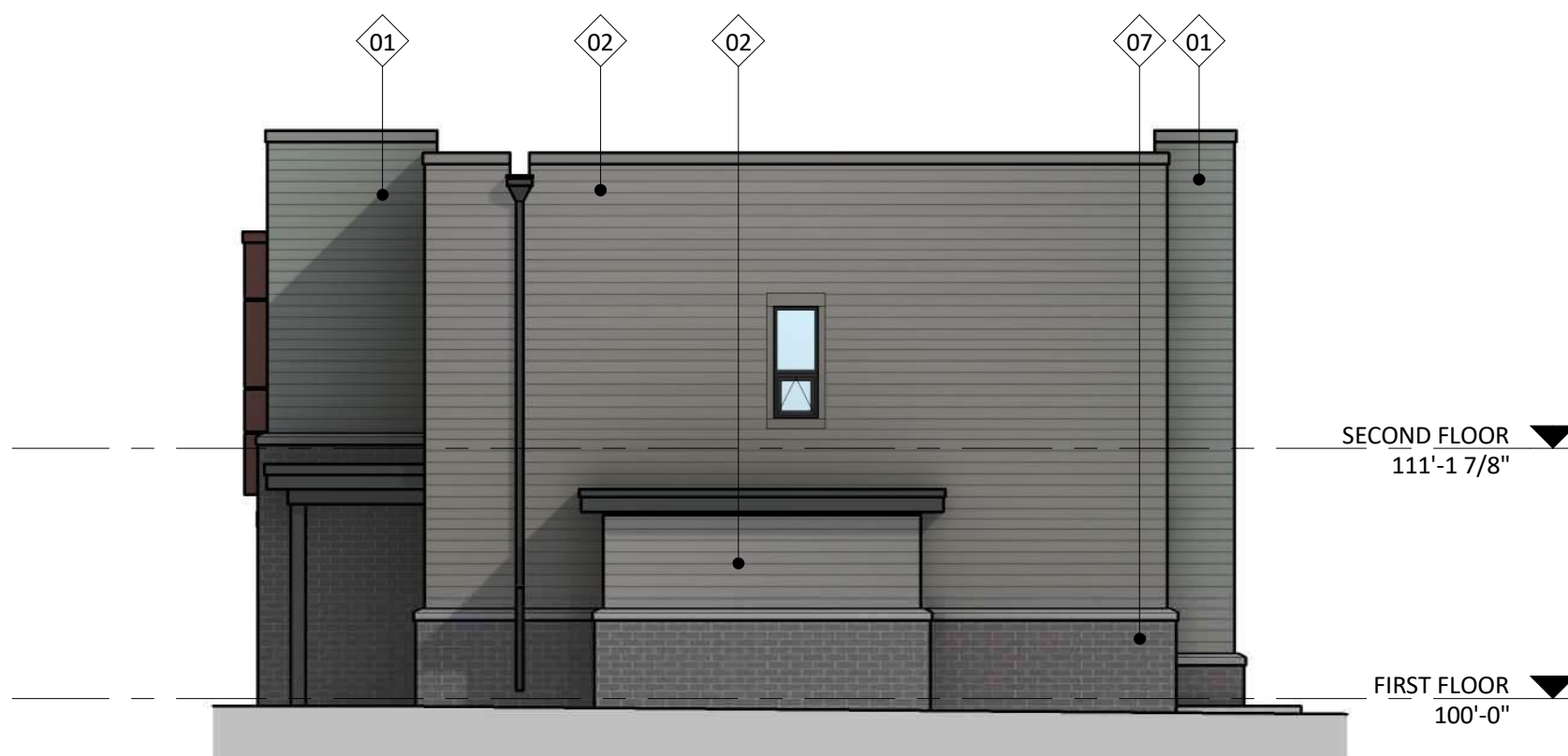
EXTERIOR MATERIAL SCHEDULE			
MARK	BUILDING ELEMENT	MANUFACTURER	COLOR
01	COMPOSITE LAP SIDING 6" EXPOSURE	JAMES HARDIE	AGED PEWTER
02	COMPOSITE LAP SIDING 6" EXPOSURE	JAMES HARDIE	RICH ESPRESSO
03	COMPOSITE PANEL	TBD	SW6629 JALAPENO
04	COMPOSITE PANEL	TBD	SW6670 GOLD CREST
05	COMPOSITE PANEL	TBD	WHITE
06	COMPOSITE TRIM	JAMES HARDIE	MATCH ADJ. MATERIAL
07	BRICK VENEER	SUMMIT BRICK	EBONY
08	CAST STONE	ROCKCAST	SMOKEHOUSE
09	RAILINGS & HANDRAILS	SUPERIOR	BLACK
10	COMPOSITE WINDOW	ANDERSEN	BLACK
11	ALUMINIUM STOREFRONT	KAWNEER	BLACK



NORTH ELEVATION

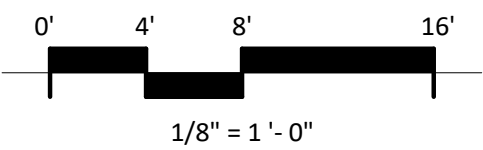


EAST ELEVATION



WEST ELEVATION

EXTERIOR MATERIAL SCHEDULE			
MARK	BUILDING ELEMENT	MANUFACTURER	COLOR
01	COMPOSITE LAP SIDING 6"	JAMES HARDIE	AGED PEWTER
02	COMPOSITE LAP SIDING 6"	JAMES HARDIE	RICH ESPRESSO
03	COMPOSITE PANEL	TBD	SW6629 JALAPENO
04	COMPOSITE LAP SIDING 6"	JAMES HARDIE	DARK CHARCOAL
05	UNIT ENTRY DOOR	TBD	BLACK
06	COMPOSITE TRIM	JAMES HARDIE	MATCH ADJ. MATERIAL
07	BRICK VENEER	SUMMIT BRICK	EBONY
08	CAST STONE	ROCKCAST	SMOKEHOUSE
09	COMPOSITE WRAPPED COLUMNS & CANOPY TRIM	JAMES HARDIE	DARK CHARCOAL
10	COMPOSITE WINDOW	ANDERSON	BLACK
11	SPRINKLER ROOM DOOR	TBD	MATCH WITH ADJ. SIDING
12	GARAGE DOOR	TBD	DARK CHARCOAL



SOUTH ELEVATION



Concept Image



Concept Image



Concept Image



Concept Image



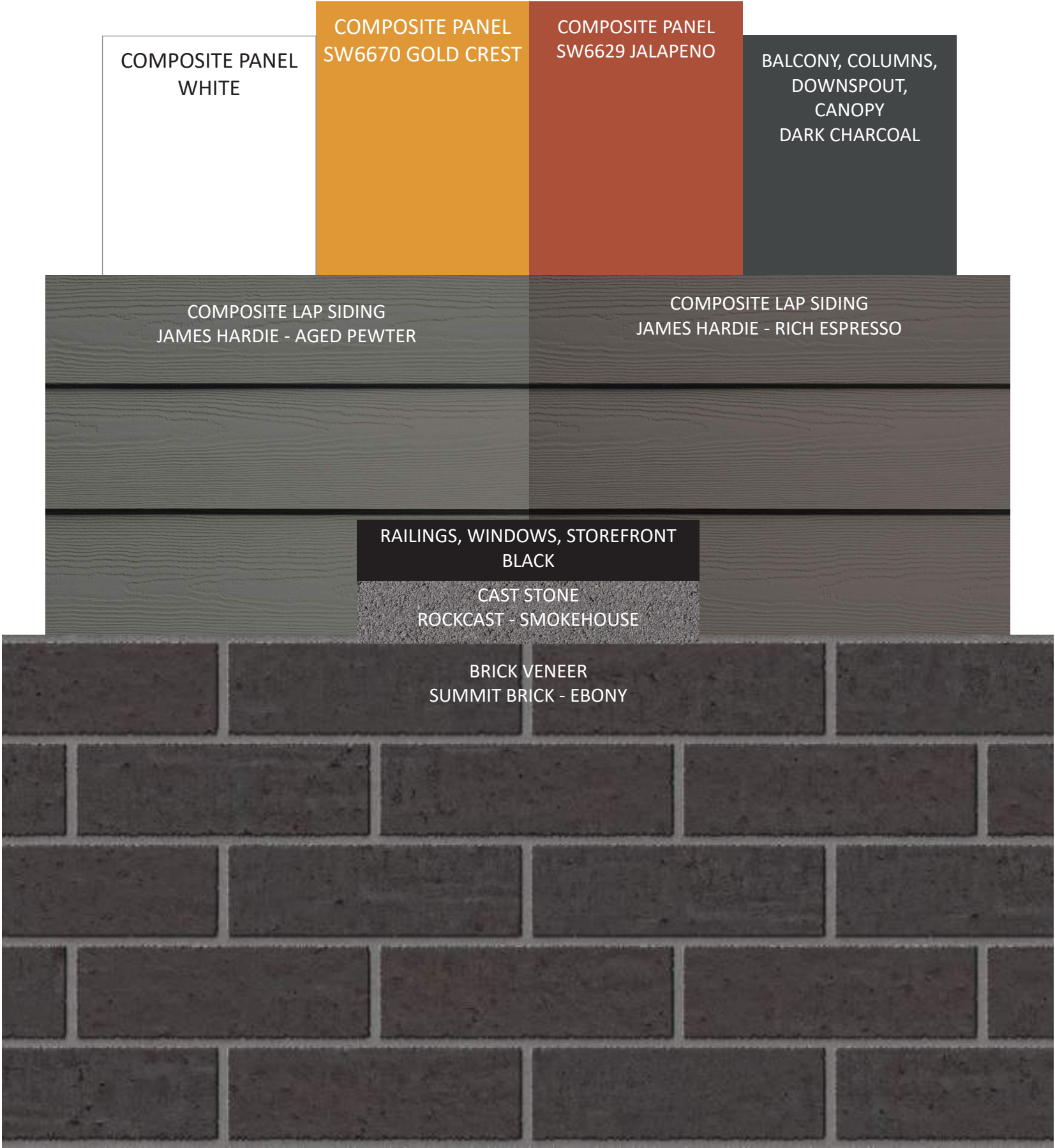
Concept Image



Concept Image



Concept Image



Material Board

Mixed-Use Redevelopment
3357-3375 E. Washington Ave. & 922-930 N. Fair Oaks Ave., Madison, WI





Volker Resume and Background



VÖLKER

WWW.VOLKER.CO

VÖLKER
FLATS

EMPOWERING COMMUNITIES

HIGH-QUALITY AFFORDABLE HOUSING
TO BETTER PLACES AND BETTER PEOPLE.

Our History



OVER 20 YEARS OF DEVELOPMENT AND EXPANSION

Völker was born from over 20 years of development experience coming together to develop over 60 affordable housing communities across 12 states. This all started back in 2001 when Louie Lange set out on his own, seeking to make an impact in communities across the country. Since then, organizational structures have come and gone, but the impact of our developments is stronger than ever.

Our 70+ person strong management company continues to manage most of the legacy portfolio properties, albeit under the new Völker flag.

The Völker organization is comprised of passionate and caring professionals operating under Völker Development Inc. and Völker Management. The portfolios of Völker Housing Partners, LLC and Völker Legacy Holdings Inc. are cultivated and residents cared for by these employees as our Core Values are on display every day.

Völker Legacy Holdings is a certified Service Disabled Veteran Owned Small Business.



Our Mission

HIGH-QUALITY AFFORDABLE HOUSING TO BETTER PLACES AND BETTER PEOPLE

We are an organization looking to make a real difference in the lives of our residents and the communities they live in. From procurement to development, construction, and management we are experienced in delivering the best affordable multifamily housing.

Core Focus & Values

AT VÖLKER WE ARE

PARTNERS

Collaboration is key, we view all our clients as partners and teammates throughout projects as well as long after.

OWNERS

We strive to be a beacon of excellence, defining ourselves by our ability to anticipate challenges and hold ourselves accountable.

EXPLORERS

We are always seeking to explore new possibilities. Staying curious and adventurous is at the heart of our organization.

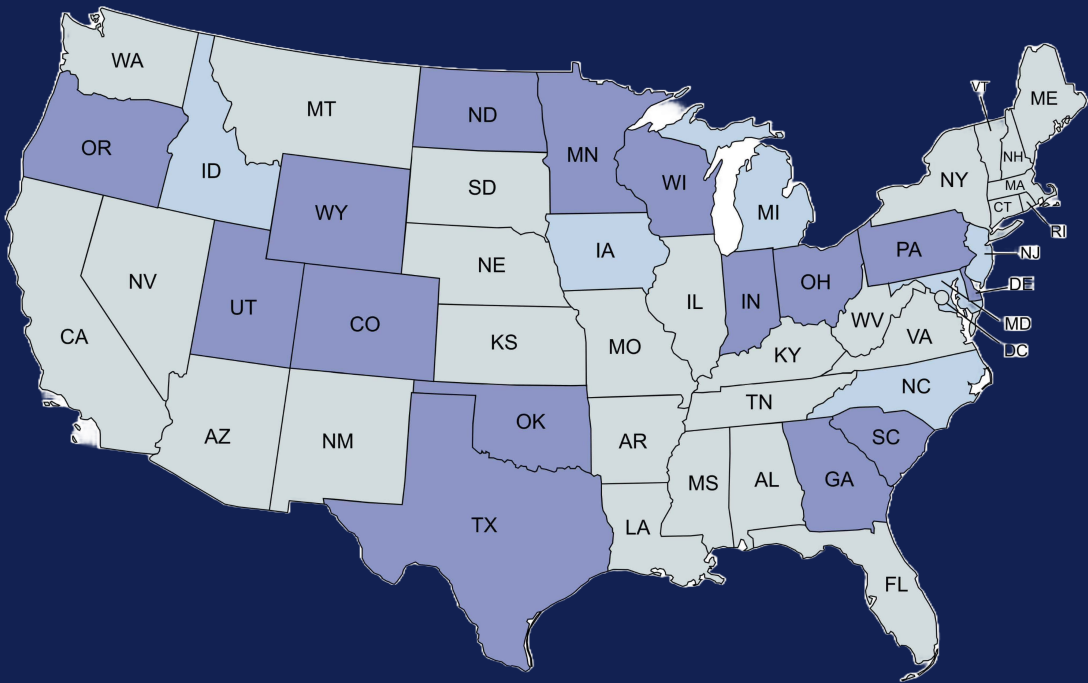
TIRELESS

As an organization, we are tirelessly committed to excelling in our field. Our approach is always results-oriented.

STUDENTS

We are in the mindset of a student who is always learning, we pull this into all our endeavors.

Our Properties



What We Do

DEVELOPMENT

DESIGNED TO MAKE A DIFFERENCE

Playing a pivotal role in addressing the pressing need for accessible and low-cost housing options within communities, we are dedicated to the development of high-quality affordable housing. We work closely with local governments, non-profit organizations, and financial institutions, to implement innovative strategies that promote inclusivity and stability in housing markets.

REAL ESTATE DEVELOPMENT

Our commitment to integrity and long-term growth drives every decision we make. From innovative design concepts to incorporating environmentally friendly practices in our buildings, we strive to create developments that not only provide affordable housing but also contribute to the long-term vitality of the neighborhoods we serve.

With Völker, you can trust that you're working with a partner who is deeply invested in improving neighborhoods and enhancing quality of life for the long-term. Let us help you build a brighter future, one community at a time.

Providing housing management
to those who need it.

MANAGEMENT

PEACE OF MIND FOR OUR TENANTS

Managing our own affordable housing communities offers numerous benefits that directly impact the well-being of residents and the overall success of our developments. By taking full control of the management process, we ensure a higher level of accountability, responsiveness, and efficiency in meeting the needs of our residents. This hands-on approach allows us to maintain a direct line of communication with tenants, promptly address maintenance issues, and implement community-driven initiatives that foster a sense of belonging and pride.

Ultimately, managing our own affordable housing communities empowers us to create lasting positive change and build stronger, more vibrant communities for generations to come. After all, who is going to take better care of our properties than ourselves?

REAL ESTATE MANAGEMENT

Through steady growth, we have developed a strong core infrastructure, enabling us to respond to clients' needs quickly and efficiently, as well as effectively manage portfolios for clients with assets in multiple areas. Völker Management's experienced management team create value through day to day supervision and long-term strategic planning. They analyze market trends to determine how to effectively position a property within a given market, then develop a custom marketing, leasing and management strategy to maximize its potential value.

We Focus On

RESPONSIVE RESIDENT/TENANT
RETENTION PROGRAMS

TECHNOLOGY INTEGRATION

ASSET PRESERVATION AND
PROACTIVE MAINTENANCE

COMMUNITY ENGAGEMENT

DEVELOPMENT ADVISORY
SERVICES

LEASE-UP CAMPAIGN EXPERTISE

TRAINING

CUSTOMIZED MARKETING

Meet Our Team

LEADERSHIP TEAM



LOUIE LANGE
FOUNDER & CEO



ADAM HANSON
PRESIDENT



LANCE MUELLER
GENERAL COUNSEL



DAVID RITCHAY
CHIEF DEVELOPMENT
OFFICER



ASHLEY KUMBIER
VICE PRESIDENT - FINANCE



MARY WAGENRIN
VICE PRESIDENT -
PROPERTY OPERATIONS

DEVELOPMENT TEAM



GREG BARON
MANAGING DIRECTOR OF
DEVELOPMENT



LAUREN SCHEVETS
MANAGING DIRECTOR OF
DEVELOPMENT



MATTHEW PADRON
MANAGING DIRECTOR OF
DEVELOPMENT



TRAVIS FAUCHALD
MANAGING DIRECTOR OF
DEVELOPMENT



MICHAELA ALLWINE
ASSOCIATE DIRECTOR OF
DEVELOPMENT



DARLENE METZ
SENIOR DEVELOPMENT
MANAGER

PROPERTY OPERATIONS TEAM



ERIC KNAPTON
REGIONAL
PROPERTY MANAGER



DANIELLE LEE
REGIONAL
PROPERTY MANAGER



AMY COUEY
REGIONAL
PROPERTY MANAGER



ALLY KASER
COMPLIANCE MANAGER



RAYMOND SARTLER
REGIONAL
PROPERTY MANAGER

VÖLKER

Founded in 2023 by Louie Lange, an industry-recognized affordable housing developer and Marine Corps veteran. Volker translates to 'defender of people'. Louie founded Volker on the dual maxims of People First and Keep it Simple. Volker is committed to excellence to provide the best housing options across diverse communities nationwide. The company is built to be nimble and responsive to current and rapidly changing market conditions.

Louie Lange previously founded The Commonwealth Companies in 2001 as a suite of vertically integrated real estate development, design, construction and management companies. Between 2001 and 2018 Commonwealth developed 62 affordable housing communities in 12 states, primarily throughout the Midwest, contributing 2,553 homes to the housing ecosystem. Commonwealth Development was named to the *Affordable Housing Finance Top 50 Developers* numerous times and achieved the 7th largest affordable housing developer designation in 2018.

In the Fall of 2018 Louie sold a majority interest in Commonwealth's development, construction and design companies with the dual purposes of expanding capacity and realizing corporate value. Between 2019 and 2023 Commonwealth developed 36 affordable communities while expanding its geographic footprint.

Louie decided to sell his remaining Commonwealth interests and reestablish his own company in the work that he is passionate about, though he retained 100% ownership interests to all projects developed prior to 2019.

Louie's new company, Volker, launched with an experienced and cohesive leadership team on top of a stable portfolio of properties and proven reputation. Leadership's primary focus is to support and encourage its market leaders who are true local experts creating impactful housing opportunities.

Louie formed Volker with the former Commonwealth CEO, Adam Hanson; General Counsel, Lance Mueller; and President of Development, David Ritchay; who are the basis of our new development firm along with four established and successful developers: Matt Padron in the Northeast, Greg Baron and Travis Fauchald in the Midwest and Lauren Schevets in the Mountain West.

Volker operates a 77-person strong property and asset management platform, led by Mary Wangerin and Ashley Kumbier. Volker manages a majority of its owned properties and asset manages all current and future properties.



Volker Development Experience List

Volker Development Inc.
Experience as of 7.23.25

Name of Project	City	State	Total Units	LH/TC Units	Property Type	LH/TC Type	Financing	Occupancy Type	Award Year	Date Placed in Service	Property Manager	Soft Funds	Green Building Certification	Integrated Supportive Housing Services and/or Set-Asides	Joint Venture Partner
Fond du Lac Center	Milwaukee	WI	24	22	NC/Apts.		9% Conventional	Family	2005	8/31/06	Volker	City of Mke HOME	N/A	N/A	N/A
Prince Hall Village	Milwaukee	WI	24	24	NC/TH & Apts.		9% Agency	Family	2007	8/1/08	Volker	N/A	N/A	N/A	Vanquard Group, LLC
Fond du Lac Townhomes	Fond du Lac	WI	48	48	NC/TH		9% Conventional	Family	2009	8/1/10	Volker	HOME, WHEDA State TC,	N/A	N/A	Advocap
Mission Village of Menasha	Menasha	WI	66	66	New Const/Cottages		9% Housing Agency	Senior	2009	8/2/10	Volker	TIF, HOME, AHP	N/A	N/A	N/A
Mission Village of Sheboygan	Sheboygan	WI	76	76	NC/Cottages		9% Conventional	Family	2010	11/15/11	Volker	HOME	N/A	N/A	Bowie Properties, LLC
The Townhomes of Craftsman Village	Plover	WI	44	43	NC/TH		9% Housing Agency	Senior	2010	9/29/11	Volker	HOME	N/A	N/A	N/A
Auxiliary Court	West Bend	WI	59	59	NC/Apts.		9% Conventional	Senior	2010	4/23/12	Volker	Wt Preservation Fund	N/A	N/A	Preservation Housing Partners
Indianhead Cottages	Mosinee	WI	24	23	NC/Rehab/Cottages		9% Conventional	Family	2011	11/25/12	Volker	HOME	N/A	N/A	N/A
Lyndale Village	Grand Chute	WI	60	60	NC/Apts.		9% Conventional	Senior	2010	1/26/12	Volker	HOME	N/A	N/A	Bowie Properties, LLC
Pleasant View Townhomes	Plymouth	WI	24	23	NC/TH		9% Conventional	Family	2011	11/26/12	Volker	HOME	N/A	N/A	Martinez Business Consulting
Trinity Square	Fond du Lac	WI	35	35	NC/TH & Apts.		9% Conventional	Family	2011	8/28/12	Volker	N/A	Wisconsin Green Built	N/A	Martinez Business Consulting
Western Townhomes	Neeenah	WI	68	64	NC/TH		9% Conventional	Family	2011	10/29/12	Volker	N/A	N/A	N/A	N/A
Riverside Senior	Fond du Lac	WI	46	41	NC/Apts.		9% Conventional	Senior	2012	11/1/13	Volker	TIF, HOME, AHP	Wisconsin Green Built	N/A	Advocap
The Village on Water	Marinette	WI	49	42	NC/TH & Cottages		9% Conventional	Family	2011	11/26/13	Volker	HOME, AHP	Wisconsin Green Built	N/A	NewCap
Mission Village of Tahlequah	Tahlequah	OK	24	21	NC/Cottages		9% Conventional	Senior	2013	10/31/14	Volker	N/A	Energy Star	N/A	N/A
Historic Lincoln School	Shawano	WI	24	24	Adaptive Reuse-Apt., NC/TH		9% Conventional	Family	2013	8/21/14	Volker	N/A	Wisconsin Green Built	(6) homeless units with case management provided by NewCap	Martinez Business Consulting
Jefferson Street Apartments	Ripon	WI	24	23	NC/TH & Apts.		9% Conventional	Family	2013	9/30/14	Volker	HOME	Wisconsin Green Built	(6) homeless units with case management provided by Advocap	Advocap
Elementary School Apartments	Schofield	WI	36	33	Adaptive Reuse		9% Housing Agency	Family	2014	12/1/15	Volker	HOME	Wisconsin Green Built	(9) veteran units - case management provided by LSS	Martinez Business Consulting
Union Square Apartments	Appleton	WI	50	50	NC/TH		9% Conventional	Family	2014	10/29/15	Volker	HOME	Wisconsin Green Built	(13) veteran units - case management provided by LSS	Martinez Business Consulting
Mission Village of Greeley	Greeley	CO	50	46	NC/TH & Cottages		9% Conventional	Family	2015	10/21/16	Volker	TIF, HOME	Enterprise Green Communities	N/A	N/A
Historic Berlin School	Berlin	WI	40	40	Adaptive Reuse-Apts, NC/TH		9% Conventional	Family	2015	11/30/16	Volker	AHP	Wisconsin Green Built	(10) homeless veteran units	Advocap
Mission Village of Dodgeville	Dodgeville	WI	40	40	NC/Cottages		9% Conventional	Family	2015	7/29/16	Volker	HOME, AHP	Wisconsin Green Built	(10) veteran units - case management provided by LSS	Martinez Business Consulting
Newbury Place	Ripon	WI	40	40	NC/Apts & TH		9% Conventional	Family	2014	3/31/16	Volker	Advocap soft funds	Wisconsin Green Built	(10) veteran units with case management	Advocap
Historic Blue Bell Lofts	Columbia City	IN	52	52	Adaptive Reuse/Apts		9% Conventional	Senior	2016	1/30/17	Volker	City Grant	N/A	N/A	N/A
Little Crow Lofts	Warsaw	IN	42	42	Adaptive Reuse/Apts		9% Conventional	Senior	2016	11/30/17	Volker	N/A	Green Communities	(8) PWD or homeless units	N/A
Beacon Avenue Cottages	New London	WI	40	34	NC/Cottages		9% Conventional	Family	2016	7/31/17	Volker	HOME, AHP	Enterprise Green Communities	Preference for Veterans/homeless residents	Martinez Business Consulting
Mission Village of Kaukauna	Kaukauna	WI	60	51	NC/Cottages		9% Housing Agency	Family	2015	3/29/17	Volker	WHEDA Subordinate Financing	Green built home	(15) veteran units	Martinez Business Consulting
Fourteen91 Lofts	Muncie	IN	72	72	Adaptive Reuse/Apts, NC/TH		9% Conventional	Family	2017	11/28/18	Volker	Indiana Housing and Community Dev Subordinate Financing	NGBS-emerald	N/A	Preservation Housing Partners
Garden View Senior Apartments	Elkhart	IN	55	55	Adaptive Reuse/Apts		9% Conventional	Senior	2016	6/28/18	Volker	N/A	Enterprise Green Communities	Supportive service referrals	none
Altwood Pointe	Florence	SC	52	52	NC/Apts		9% Conventional	Family	2016	6/5/18	Volker	HOME	Energy Star	N/A	PHP Mission Village of Florence, LLC & North Charleston Renaissance, Inc.,
Lawler School Lofts	Prairie du Chein	WI	40	34	Adaptive Reuse/Apts		9% Conventional	Family	2016	10/30/18	Volker	HOME, AHP	Green Built Homes	(10) homeless veteran units	Martinez Business Consulting
Parish School Apartments	Fond du Lac	WI	47	40	Adaptive Reuse/Apts, NC/TH		9% Conventional	Family	2016	3/23/19	Volker	N/A	Wisconsin Green Built	(11) homeless veteran units - case management provided by Advocap, County veterans servic and Aging and Disability Resource Center	Advocap
Presene at Chatham Parkway	Savannah	GA	144	144	NC/Apts.		4% Conventional	Family	2017	7/29/19	Volker	N/A	N/A	N/A	N/A
Dunbar Commons	Oklahoma City	OK	52	52	Adaptive Reuse/Apts		9% Conventional	Senior	2017	10/1/19	Volker	N/A	Green Building	N/A	N/A
Barton School Apartments	West Bend	WI	40	40	Adaptive Reuse/Apts, NC/TH		9% Conventional	Family	2018	11/1/19	Volker	HOME, AHP, WHEDA Subordinate Financing	Green Built Homes	(8) units - veterans &/or at risk of homelessness - Veteran Service office	Wisconsin Partnership for Housing Development
Cottages on Main Street	Hortonville	WI	40	34	NC/Cottages & TH		9% Conventional	Family	2017	1/1/19	Volker	HOME, AHP	Green Built Homes	N/A	Preservation Housing Partners
Friar House Flats	Green Bay	WI	40	40	Adaptive Reuse/Apts		9% Conventional	Family	2018	11/12/19	Volker	Brown County Loan, HOME, AHP	N/A	N/A	Wisconsin Partnership for Housing Development
Mission Village of Evans	Evans	CO	68	68	NC/Cottages		9% Conventional	Family	2019	7/31/20	Volker	HOME, CDBG Disaster Recovery	Enterprise Green Communities	N/A	Greeley Area Habitat for Humanity
Mission Village of Cheyenne	Cheyenne	WY	41	41	NC/Walk up		9% Conventional	Family	2017	1/21/20	Volker	HOME	Enterprise Green Communities	N/A	N/A
Magnolia Pointe	Florence	SC	24	24	NC/Apts	HOME/AHTF	N/A	Senior	2018	5/1/21	Volker	HOME, NHTF - SC Housing, SC SHTF Loan	N/A	N/A	N/A
Mission Village of Pecos	Pecos	TX	60	49	NC/TH		9% HUD 221d4	Family	2013	8/11/15	FDI	HOME	N/A	N/A	SDA 1305, LLC (a TX HUB)
Mission Village of Jacksonville	Jacksonville	TX	48	48	NC/Cottages		9% HUD 221d4	Family	2014	8/31/16	FDI	City Loan	N/A	N/A	SDA 1305, LLC (a TX HUB)
Mission Village of Monahans	Monahans	TX	49	44	NC/Cottages		9% HUD 221d4	Family	2014	11/5/16	FDI	HOME, City Loan	N/A	N/A	N/A
Station Square	Roy	UT	31	25	NC/Apts.		9% Housing Agency	Senior	2015	12/30/16	Evergreene Management	Olene Walker Housing Fund	Enterprise Green Communities	(2) Homeless units and (3) Veterans-case management by Weber HA	Weber Housing Authority and Veterans Affairs
Historic Apartments on 4th	Mandan	ND	39	39	Adaptive Reuse/Apts		9% Conventional	Family	2017	12/18/18	Metro Plains	Community Works North Dakota	Enterprise Green Communities	Mother Theresa Outreach services	N/A
15th Street Flats	Wilmar	MN	47	47	NC/Apts.		9% Housing Agency	Family	2018	8/30/19	Kandiyohi County HRA	N/A	Enterprise Green Communities	United Community Action Partnership & Kandiyohi County Health and Human Services (GRH)	Kandiyohi County HRA
White Pines	Cloquet	MN	35	35	NC/Apts		9% Housing Agency	Family	2019	10/23/19	Metro Plains	MHFA Subordinate Financing	N/A	N/A	Cloquet Housing Authority
The Edge Artist Flats	Fargo	ND	42	42	NC/Apts		9% Conventional	Family	2018	7/30/19	Metro Plains	HTF Loan	N/A	N/A	Wisconsin Partnership for Housing Development
Sunset Village Apartments	N. Albany	OR	40	40	NC/Apts		9% Conventional	Family	2018	12/20/19	Viridian Management	Oregon Housing and Community Services Loan	Earth Advantage	Homeless 18-22 yr olds	Jackson Street Youth Center
The Ridge	Colorado Springs	CO	60	60	NC/Cottages		9% Conventional	Family	2018	7/1/20	Grecoio	TIF, HTF	Green Communities	Greccio offers services and classes	Greccio Housing Unlimited, Inc.,
Cherokee Place	North Branch	MN	48	48	NC/Cottages		4% HUD Risk Share	Family	2019	7/17/20	Volker		Enterprise Green Communities	Rise - (5) PSH & (6)LTH units	N/A
Surf View Village	Newport	OR	110	110	NC/Walk up		4% Conventional	Family	2019	6/18/20	Viridian Management	Oregon Local Innovation Fast Track Funding	Earth Advantage	none	N/A
Avenue Commons	Andrews	TX	60	50	NC/Walk up		9% HUD 221d4	Family	2018	3/16/20	FDI	N/A	N/A	Better Texans Foundation-Supportive service coordination & classes/services	N/A
Ganett Square	Cleveland	OH	49	49	NC/Apts		9% Conventional	Senior	2023	Under Lease-Up	Barton Communities	City of Cleveland HTF	N/A	N/A	N/A
Puritas Senior	Cleveland	OH	48	48	NC/Apts		9% Conventional	Senior	2023	Under Construction	TBD	TBD	N/A	N/A	N/A
Chapel Branch	Lewes	DE	42	42	NC/Walkup		9% Conventional	Family	2023	Under Construction	East Coast	TBD	N/A	N/A	N/A
Carmany Place	Annnville	PA	48	48	NC/Walkup		9% Conventional	Family	2023	Under Construction	VLH	HOME, HFLB, PHARE HTF, State LH/TC,	N/A	N/A	N/A
Walton Senior	Cleveland	OH	52	52	NC/Apts		9% Conventional	Senior	2024	Awarded, not yet closed	Barton Communities	City of Cleveland HTF, HOME	N/A	N/A	N/A
Steigel School Apartments	Philadelphia	PA	42	42	Adaptive Reuse		9% Conventional	Senior	2024	Closed, Under Construction	TBD	TBD	N/A	N/A	N/A
2640 E. Lehigh	Philadelphia	PA	36	36	NC/Apts		9% Conventional	Family	2024	Closed, Under Construction	TBD	TBD	N/A	N/A	N/A
Blossom Commons	Westminster	CO	50	50	NC/Apts		9% TBD	Senior	2025	Closed, Under Construction	Ross-Envolv	HOME, State AHTC, City Funds, State TOC TC	Green Building	N/A	N/A
Kelly Station	Madison	WI	76	76	NC/Apts		4% Conventional	Family	2025	Closed, Under Construction	Volker	Madison AHF, Dane County AHDF	Wisconsin Green Built	LSS - (10) units for disabled veterans and (9) units for individuals and families experiencing homelessness	Cordon Housing
Alpine Senior	Grand Rapids	MI	52	52	NC/Apts		9% TBD	Senior	2025	Awarded, not yet closed	Volker	45L Credits, HOME, AHP	TBD	ICOF Community Homes (homeownership prep and financial literacy classes)	Equity First Community Development, LLC and Little River Real Estate Management, LLC



Volker List of Properties Managed

Volker Legacy Holdings, Inc., d/b/a Volker Management Inc.

List of Managed Projects

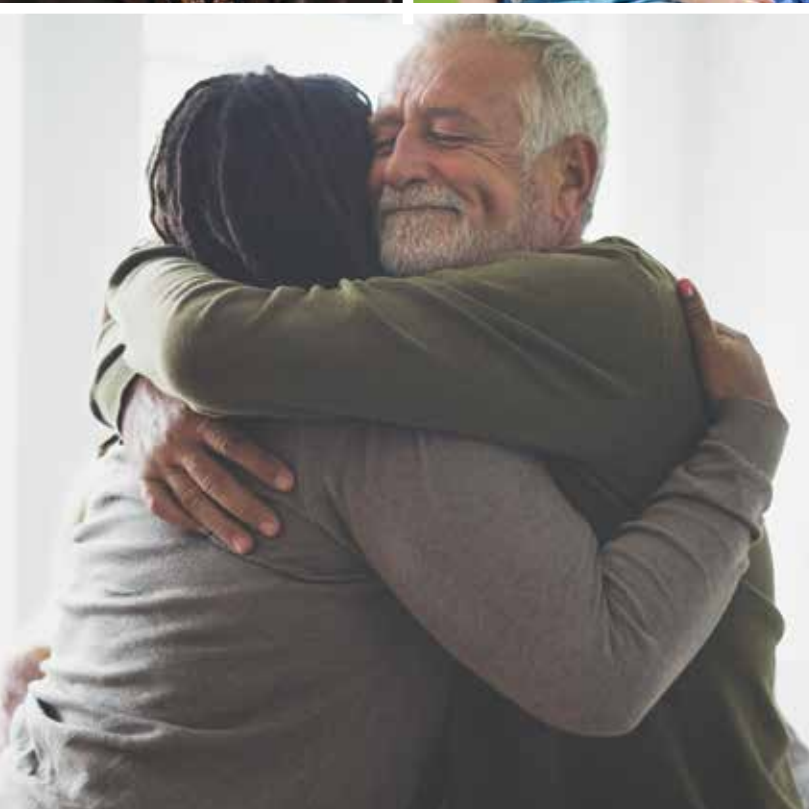
7/23/2025

Name of Project	City	State	Total Units	LIHTC Units	Property Type
Fond du Lac Townhomes	Fond du Lac	WI	48	48	NC/TH
Mission Village of Menasha	Menasha	WI	66	66	New Const/Cottages
Mission Village of Sheboygan	Sheboygan	WI	76	76	NC/Cottages
The Townhomes of Craftsman Village	Plover	WI	44	43	NC/TH
Auxiliary Court	West Bend	WI	59	55	NC/Apts.
Indianhead Cottages	Mosinee	WI	24	23	NC/Rehab/Cottages
Lynndale Village	Grand Chute	WI	60	60	NC/Apts.
Pleasant View Townhomes	Plymouth	WI	24	23	NC/TH
Trinity Square	Fond du Lac	WI	35	35	NC/TH & Apts.
Western Townhomes	Neenah	WI	68	64	NC/TH
Riverside Senior	Fond du Lac	WI	46	41	NC/Apts.
The Village on Water	Marinette	WI	49	42	NC/TH & Cottages
Mission Village of Tahlequah	Tahlequah	OK	24	21	NC/Cottages
Historic Lincoln School	Shawano	WI	24	24	Adaptive Reuse-Apt., NC/TH
Jefferson Street Apartments	Ripon	WI	24	23	NC/TH & Apts.
Elementary School Apartments	Schofield	WI	36	33	Adaptive Reuse
Union Square Apartments	Appleton	WI	50	50	NC/TH
Mission Village of Greeley	Greeley	CO	50	46	NC/TH & Cottages
Historic Berlin School	Berlin	WI	40	40	Adaptive Reuse- Apts; NC-TH
Mission Village of Dodgeville	Dodgeville	WI	40	40	NC/Cottages
Newbury Place	Ripon	WI	40	40	NC/Apts & TH
Historic Blue Bell Lofts	Columbia City	IN	52	52	Adaptive Reuse/Apts
Little Crow Lofts	Warsaw	IN	42	42	Adaptive Reuse/Apts
Beacon Avenue Cottages	New London	WI	40	34	NC/Cottages
Mission Village of Kaukauna	Kaukauna	WI	60	51	NC/Cottages
Fourteen91 Lofts	Muncie	IN	72	72	Adaptive Reuse/Apts; NC/TH
Garden View Senior Apartments	Elkhart	IN	55	55	Adaptive Reuse/Apts
Attwood Pointe	Florence	SC	52	52	NC/Apts
Lawler School Lofts	Prairie du Chein	WI	40	34	Adaptive Reuse/Apts
Parish School Apartments	Fond du Lac	WI	47	40	Adaptive Reuse/Apts; NC/TH
Preserve at Chatham Parkway	Savannah	GA	144	144	NC/Apts.
Dunbar Commons	Oklahoma City	OK	52	52	Adaptive Reuse/Apts.
Barton School Apartments	West Bend	WI	40	40	Adaptive Reuse/Apts; NC/TH
Cottages on Main Street	Hortonville	WI	40	34	NC/Cottages & TH
Friar House Flats	Green Bay	WI	40	40	Adaptive Reuse/Apts
Mission Village of Evans	Evans	CO	68	68	NC/Cottages
Mission Village of Cheyenne	Cheyenne	WY	41	41	NC/Walk up
Magnolia Pointe	Florence	SC	24	24	NC/Apts
Carmany Place*	Anncville	PA	48	48	NC/Walk up
Steigal School Apartments*	Philadelphia	PA	42	42	Adaptive Reuse/Apts
Kelly Station*	Madison	WI	76	76	NC/Apts
40			2002	1934	

*Currently under construction



Lutheran Social Services of Wisconsin and Upper Michigan, Inc. Information



WE ARE LUTHERAN
SOCIAL SERVICES
OF WISCONSIN AND
UPPER MICHIGAN



A LETTER FROM OUR PRESIDENT AND CEO

Dear friends,

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

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

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

Thank you for your continued support.

Sincerely,

A handwritten signature in black ink, appearing to read 'Hector Colon', with a stylized flourish at the end.

Héctor Colón
President & CEO



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

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

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

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

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

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

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



Our Mission

Act compassionately.
Serve humbly.
Lead courageously.

Our Vision

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

Our Guiding Philosophy

Servant Leadership

Our Core Belief

We believe in the infinite worth of every person.

Our Core Values



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



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



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



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



COMMUNITY-BASED SERVICES

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

Behavioral Health and Recovery

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

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



Developmental Health and Supportive Services

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

Individuals and families often benefit from programs such as:

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

Restorative Justice

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

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

Refugee Resettlement

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

Foster Care and Adoption

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



"It was a rewarding experience to be there and support this little one, even if it was for only a short time."

Spring, LSS Foster Parent

The Rewards of Foster Care Keep on Giving

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

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

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

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



IRIS Connections

The lack or loss of personal independence resulting from a disability or the effects of aging can be frustrating and devastating. LSS supports older adults and individuals living with disabilities in making meaningful choices to live the life they choose and achieve their goals through our IRIS (Include, Respect, I Self-Direct) Connections program. To learn about IRIS Connections eligibility, contact the Aging and Disability Resource Center:

www.dhs.wisconsin.gov/adrc

DHSwebmaster@dhs.wisconsin.gov

608-266-1865 | TTY: 711 or 800-947-3529

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



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

Rosetta, Connections Participant

Helping Rosetta Move Forward

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

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

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

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

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

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



RESIDENTIAL SERVICES & HOUSING PROGRAMS

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

Residential Services

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

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

Housing Services

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

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

Dave Found His Home As a Teacher At Homme

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

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

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

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



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

Dave, LSS Teacher



About Us

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

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

Stay in Touch

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lsswis.org | (414) 246-2300 | info@lsswis.org





Community Impact Report 2024

You Can Impact Your Community.
You Are Making a Difference.
You Will Change Lives.

You renew *connection*

Your compassion ensures a forever family for Nolan

When Baby Nolan was placed with Foster Mom Vicky at age 4 months, he had already lived in three different homes. After several months, it was clear that returning to his family of origin was not best for Nolan. By that time, Vicky realized she loved Nolan and wanted to do whatever it took to be his forever mom. LSS stood alongside Vicky, helping her understand the lengthy legal process that ensued and referring her to appropriate resources to support Nolan's development. Nolan and Vicky are now a forever family!

Every child needs a supportive family in which to grow, learn and thrive. Your partnership wraps children like Nolan in love so that in their forever family they can heal from past trauma, build resilience, and open their own hearts to receive love.



You renew *independence*

Your love shelters Henry in his new home

Chronic health issues led to Henry losing his job and home, forcing him to live in an abandoned RV deep in the woods with no electricity or running water. He felt lonely and hopeless. He became hospitalized and was diagnosed with severe dehydration and depression. He was referred to LSS Gaining Ground, a well-coordinated system of support to meet the comprehensive needs of the people it serves.

Our case worker walked beside Henry to develop goals. She helped Henry complete housing applications, update his Social Security and Disability status, and advocate for access to other community-based resources. In time, Henry found an affordable apartment. He sees doctors to manage his health concerns and receives Meals on Wheels. Henry is flourishing.



Everyone deserves a safe, stable home. Through your generosity each person's specific situation is addressed by assessing the underlying issues that led to homelessness and providing wrap-around services and care coordination to ensure housing is sustainable.



You renew *purpose*

Your dedication lights the way to Laura's bright future

Laura experienced significant trauma in her young life. As a junior in high school, she was acting out in anger and aggression. She was referred to LSS School Centered Mental Health (SCMH) for robust, holistic services that provide help at school and in her home. Our licensed therapists worked with Laura and her counselors, teachers, staff, and mom to help develop a treatment plan for her. Our family coach met with Laura's mom at her home and in the community to provide counseling and resources in support of the health and well-being of her entire family.

Laura worked with our therapist to strengthen her coping skills, address her anger responses, and find healthier ways to express her needs. She has rebuilt her relationship with her mom and siblings. She graduated in May 2024 and is now attending college.

Students like Laura need help to heal and cope before they exhibit harmful behaviors towards themselves or others. Your compassion provides a pathway to well-being.

You renew *confidence*

Your generosity helps Kenny find his way

When Kenny first arrived at LSS Clubhouse he was unemployed, nearly homeless, and grappling with thoughts of suicide. LSS staff and other Clubhouse members accepted him with kindness, warmth and understanding. **"They guided me through my dark depression. They pointed me in the right direction to healing and happiness again,"** Kenny said.

LSS Clubhouse offerings are based on a recognized international model that provides social contact in a structured, meaningful daily routine for those diagnosed with mental illness. The program has proven vital in relieving feelings of hopelessness which lessens the risk of psychiatric hospitalization.

Kenny received our transitional employment services and was assigned a position as property caretaker at a senior living apartment complex. Eventually, the company hired him as an employee.

Recovery is a process that is seldom linear. Because you care, people in recovery will always have a supportive community in which to use their God-given gifts to serve.

Some names and photos are changed for privacy.



You renew *empowerment*

Your welcoming heart opens doors to new beginnings

In 2024, LSS Refugee Resettlement celebrated 50 years of service. Over that time we helped 11,000 individuals and families lawfully and permanently enter the U.S. after having fled unspeakable violence and war. In the first 90-days alone, LSS helps to secure initial housing; food and clothing; school enrollment for children; English as a second language classes; job services and placement. We then continue working with individuals and families to help them become independent and self-sufficient. This generally occurs within 6-to-12 months. After that initial period, LSS is on-call to answer questions and serve as a resource. The goal for each refugee is self-sufficiency as quickly as possible. Eighty-eight percent of the refugees served by LSS are employed within 6 months of arrival.



- Fatima, recently resettled from Afghanistan, works at major healthcare provider coordinating appointments for newly arrived refugees.
- Sonda, a Rohingya woman, is now a case manager at a local agency assisting in resettling new refugees.
- Ahmad, who served as a judge in Afghanistan, is working at a local immigration service supporting Afghan clients on their path to citizenship.

Building a new life, becoming self-sufficient and remaining independent requires a firm foundation and an occasional helping hand.

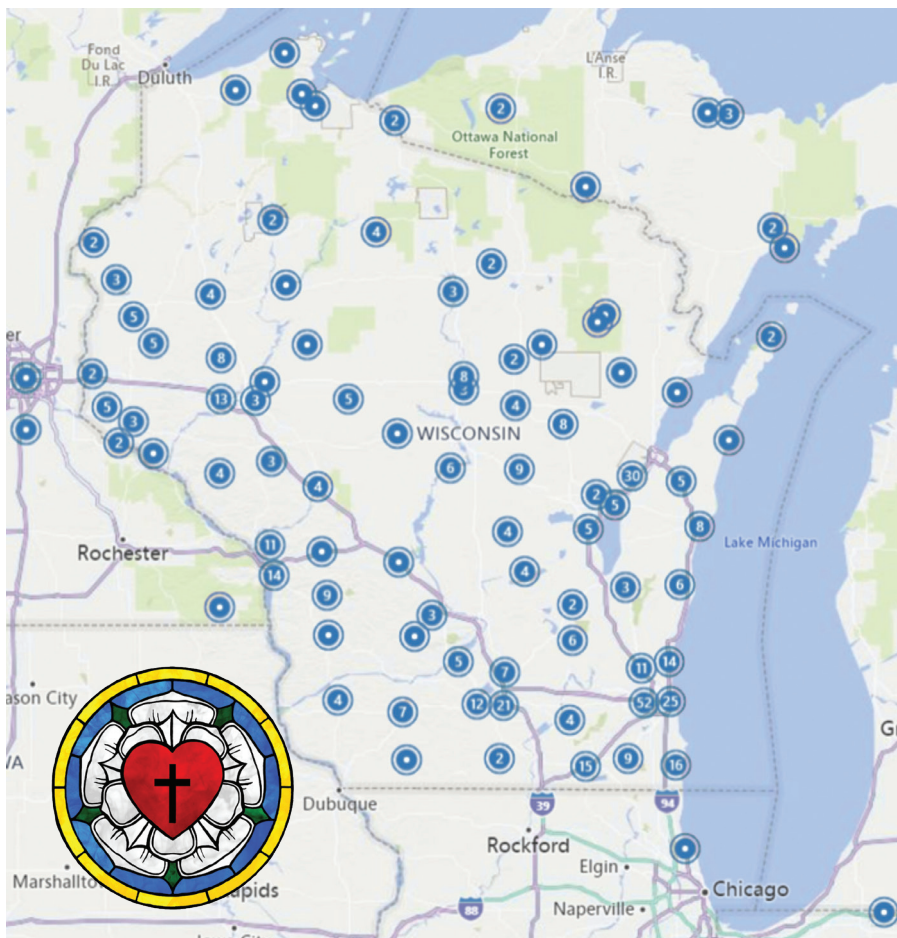
Some names and photos are changed for privacy.

Loving Lutherans:

Renewing the LSS-Lutheran Partnership

LSS and Lutheran congregations have a long history of interconnected social services work. Providing financial support of our ministry is also a long-standing and beloved Lutheran tradition. And that support is only growing!

But in 2024, one generous and creative donor did something to turn that around! With the promise of a \$1 million match on all new and increased gifts received by 12/31/24, this anonymous donor agreed inspired Loving Lutherans and their churches to donate more than \$770,000 to LSS!



Inaugural 2024 *Loving* Lutheran Congregations



We had so much fun consulting with bishops, pastors, and leaders across Wisconsin and Upper Michigan, chatting with members on the phone, and visiting your congregations and Synod events. By year-end a movement had been born, and LSS was eager to keep it going! And because we were so committed and successful, the donor graciously extended the challenge until we reach the full \$1 million!

Let us know if you would like to promote the Loving Lutherans Challenge at your church through temple talks, sermons, adult forums, etc. To learn more, or to see if your Lutheran church qualified as one of the 234 inaugural 2024 Loving Lutheran congregations, visit www.lsswis.org/lovinglutherans/.

Thanks to our anonymous donor and the Lutherans who answered their call, we will strengthen families, inspire recovery, and empower independence for people living in our shared communities who have the greatest needs.

Dear Friends,

As we look back on 2024 at LSS, one word echoes through every story, every milestone, and every act of service: **renewal**. Renewal of purpose. Renewal of connection. Renewal of the compassion we extend to our neighbors across Wisconsin and Michigan's Upper Peninsula.

This past year, your unwavering generosity, acts of service, and advocacy have been the heartbeat of our work in the communities where we serve. Through every challenge, opportunity, and triumph your support has been our foundation and our inspiration.

Because you care, 2024 was a year of incredible impact. Your kindness, and financial support empowered us to strengthen families and expand hope in transformative ways. With deep gratitude, here are a few of the milestones that shaped this year of renewal. Together, we:

- **Doubled the reach** of our Superior Futures for Youth (SFFY) services in Upper Michigan which assists young people (ages 12-24) in crisis, provided support to those at risk of running away or experiencing homelessness.
- **Launched new research** on the impact of our School Centered Mental Health family coaches on the social determinants of health for youth thanks to a three-year Wisconsin Partnership (WPP) grant and the chance to team up with academic researchers at UW-Milwaukee's Institute for Child and Family Well-Being.
- **Expanded affordable housing solutions** for residents across Wisconsin combining tax credit housing, property management, and care coordination to address the growing housing crisis.
- **Invested in early intervention services**, reaching families before a crisis, ensuring children and caregivers receive the support they need to thrive.
- **Celebrated 50 years of the LSS Foundation** and the transformative funding that has sustained innovation and helped open new programs to meet evolving community needs.

Your ongoing support is more than just appreciated, it is essential. With you by our side, we are not just meeting needs, we are renewing hope and dignity for people rebuilding their lives. Thank you for reaffirming the power of love and possibility in action through your partnership.

With gratitude,

A handwritten signature in black ink, appearing to read 'Hector Colon'.

Héctor Colón
President & CEO

A handwritten signature in black ink, appearing to read 'Eric Lorenz'.

Eric Lorenz
Operating Board Chair

PS. You may have noticed we've decided to renew our brand, launching with this publication! The three flames in our new logo represent completeness, unity, and divine perfection. This symbolism also acknowledges our deep history, bridging tradition and innovation, ensuring that we honor our roots while continuing to be a dynamic, responsive force for strengthening and healing communities.

2024 Financials

Expenses*

Total Expenses: \$73,901,269



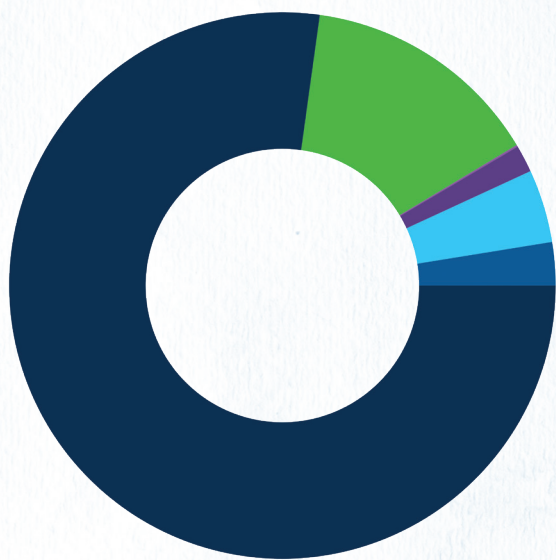
• Program Services
\$65,994,496

• Administrative & General
\$6,670,276

• Fundraising
\$1,236,496

Revenue*

Total Revenue: \$74,392,093



• Federal, State, Local Service
\$57,422,922

• Client Fees, Insurance or Contracts
\$10,572,808

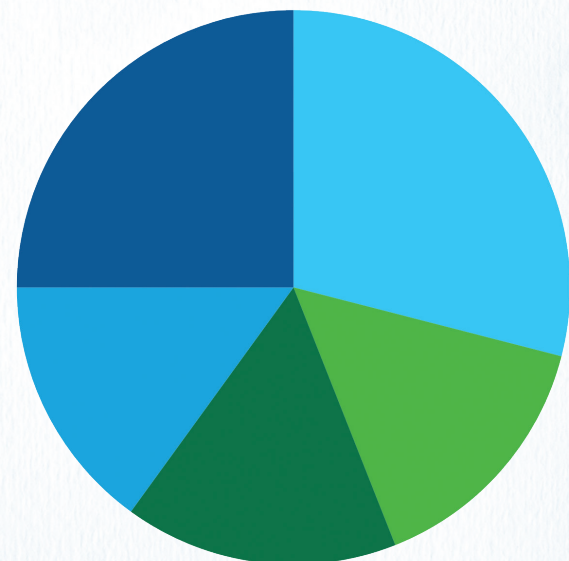
• Grants
United Way: \$80,390
Capital & Other Grants: \$1,198,896

• Bequests & Contributions
\$3,218,114

• Other Income
\$1,898,964

Source of Contributions

Total Contributions: \$4,008,180



• LSS Foundation, 25%
\$989,672

• Individuals, 29%
\$1,171,340

• Corporations & Foundations, 15%
\$608,540

• Organizations, 16%
\$621,908

• Bequests, 15%
\$616,720

*This state of financial positions is prior to audit completion.



6737 W Washington Street, Ste 2275
Milwaukee, WI 53214



Renew your commitment to the future with the LSS Foundation, Inc.

The LSS Foundation has been building a long-term legacy for LSS for over 50 years, providing financial stability annually and extra funding for innovation.

Many donors create a legacy by establishing an endowed fund within the foundation. With an investment \$25,000+ you can leave a legacy in your name, or in memory/honor of a loved one. The gift will support LSS in perpetuity and each gift to your fund is tax-deductible!

For more information, contact Mara Dučkens, Chief Advancement Officer at (414) 416-7843.

LSS Leadership

Héctor Colón, President and CEO
Joe Arzbecker, Chief Operating Officer (2024)
Mara Dučkens, Chief Advancement Officer

Michelle Naples, Chief Integration Officer
Randy Oleszak, Chief Financial Officer
Tara Treglowne, Chief Operating Officer (2025)

LSS Board of Directors

Eric Lorenz, Chair
Joel Treffert, Vice Chair
Héctor Colón, President & CEO
Frank Cumberbatch, Secretary
Mike Groth, Treasurer

Luis Arroyo
Allen Cooper
Keri De Bruin
Dean Gruner
Matt Kirchner

Pastor Bill Knapp
Bishop Felix Malpica
Sue Merkatoris
Dick Pieper
David Remstad

Oralee Schock
Michael Sheppard
Melanie Varin

Housing Service Coordination

Lutheran Social Services of Wisconsin and Upper Michigan

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

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

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

Service Coordinators act as:

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

Empowerment Agents

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

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

Make a difference at your property:

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

From a Property Owner:

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

For additional information please contact:

Leah Gubin, Housing Service Provision Manager

920-312-4835

Leah.Gubin@lsswis.org

www.lsswis.org/housing



Gabe Fritz Resume and Background

August, 2025

Attn: Travis Fauchald
Managing Director of Development, Volker
464 Hickory Street, Suite C
Fond du Lac, WI

RE: Edifici, LLC – Affordable Housing Industry Goals and Objectives

I have worked in the affordable housing industry for the last 24 years. My professional journey began as a neighborhood Revitalization Coordinator and later Project Manager at a not-for-profit 501C3 organization, and then as the Development and Marketing Director at a privately held, for-profit single-family construction and development company. I then returned to work as a Director at that same nonprofit organization before I was approached by the mayor's Office to serve as the Director of the Office of Housing and Community Development for Louisville Metro Government. I then transitioned into the role of Director of Development for a regional for-profit affordable housing and property management company based in Lexington, KY. Just this past fall, I rejoined the original nonprofit where I began my career as VP, COO.

Over the course of the last two decades I have worked on myriad development projects, including historic adaptive reuse renovations of commercial and industrial buildings into affordable multifamily housing through the use of state and federal Historic tax Credits, and adaptive reuse projects which have transformed vacant hospitals, schools and warehouses into affordable housing opportunities for families and seniors. I have also worked on the recapitalization of existing assets using various funding mechanisms, including the 9% LIHTC and RD loan programs. I also have experience with both greenfield and brownfield new construction development across the region.

During my work at the City of Louisville, I managed the office that administered and managed the investment pool and loan portfolio for all HUD formula funding for the MSA, including HOME, CDBG, HOPWA, etc. Our department also created a new revolving loan product that subsidized thousands of units of affordable housing across the city.

I am also very involved as a board member in my community, and in the past have been on the Care Advisory Board at University of Louisville Hospital, Vital Neighborhoods Group at Metro United Way, Friends of the Library, YouthBuild Louisville, The Center for Neighborhoods, and several other organizations. Currently I am on the boards of a local CHDO – River City Housing, Habitat for Humanity of Metro Louisville, and St. John Center, which is homeless day shelter that just opened a new, 80 bed LIHTC permanent supportive housing center called Sheehan Landing. This innovative, state of the art facility has extensive, 24-7, 365 days per year security and access to wrap around services on site, including counseling, healthcare, and job training. I was recruited to the board to bring LIHTC development experience and capacity for this project. From this Board service, I have learned a great deal about supportive service delivery and structuring successful partnerships. These are experiences

that can bring as an Emerging Developer to the ownership and management of LIHTC communities that provide on-site supportive services.

Throughout the scores of projects, thousands of units, and hundreds of millions of dollars of investment associated with this work across my career, I had never had the opportunity to serve in any sort of capacity related to partnership or ownership of a project. But that has always been my long-term goal and intention.

I began a single member company a few years ago to pursue this career aspiration, but due to the nature of my day jobs, I needed to work outside the region of the country (the southeast) where the companies that I have worked for do business. I have focused on the Midwest Region, because I have family there and have been traveling up north for summers for the majority of my life, and I also am familiar with a couple of development companies that do work in these markets because of professional relationships in the industry. I hope to retire one day in near the Great Lakes in fact, and am diligently committed to working to produce affordable housing opportunities. Both of my grandparents were born there. It is also accessible to me and easy to reach by automobile for site visits, etc.

I am currently a co-developer and co-managing member for a MSHDA-funded LIHTC development in Grand Rapids called the Lexington School, which was the historic renovation and adaptive re-use of a school into senior housing. My involvement is as a MSHDA-approved Emerging Developer. The Project received points for my participation as an Emerging Developer. Lexington School has created 39 units of housing, and the project is currently leasing up towards stabilization now. I was absolutely thrilled to be apart of the project, proud to have been a reliable and active partner, and really satisfied with the finished product. I will be involved with the operation and management of that property for the next 15 years.

As the sole member of Edifici, my long-term goals include the development of affordable housing opportunities for seniors and families throughout the Midwest, Wisconsin and other states. The recently awarded Alpine Senior Apartments Project in Michigan and the Fair Oaks and Ridgeway projects in Madison will allow me to increase my experience by working alongside Volker Development, obtaining WHEDA experience.

Although I have experience working in the affordable housing industry, I qualify as an Emerging Developer and meet WHEDA's requirements. I am anxious to pursue additional development opportunities throughout the Midwest and in the Great Lakes Region with Volker as an Emerging Developer and beyond. I bring a unique and valuable skillset to the table, from design to construction to management. I am excited about the opportunity to partner with Volker on Fair Oaks and Ridgeway projects and look forward to work towards ending homeless in Dane County and to continued success in the creation of affordable housing for those that need it the most.

Best,

Gabe Fritz
Edfici, LLC