

# DANE COUNTY APPLICATION FOR 2025 NON-LIHTC FUND

This application should be used for project seeking Dane County Non-LIHTC funds. **Applications must be submitted electronically to DCDHS Division of Housing Access by 12:00 p.m. (CST) on September 5, 2025.** Upload application materials to the [Dane County AHDF Dropbox](#).

## APPLICATION SUMMARY

ORGANIZATION NAME	Casa4U,LLC		
MAILING ADDRESS	If P.O. Box, include Street Address on second line 803 Sunrise Bay, Waunakee WI 53597		
TELEPHONE	608-338-5554	LEGAL STATUS	
FAX NUMBER	608-849-9100	<input type="checkbox"/> Private, Non-Profit <input checked="" type="checkbox"/> Private, For Profit <input type="checkbox"/> Other: LLC, LLP, Sole Proprietor	
NAME CHIEF ADMIN/ CONTACT	Lynette Porior-Arce	Federal EIN: <u>88-2248819</u>	
INTERNET WEBSITE (If applicable)	wisconsinluxurycondorental.com	Unique Entity Identifier (UEI):	
E-MAIL ADDRESS	casarental@protonmail.com		

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

PROJECT NAME	PROJECT CONTACT PERSON	PHONE NUMBER	E-MAIL
606 Reeve Drive Mixed-Use Development – CASA4U, LLC	608-338-5554		casarental@protonmail.com

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

TOTAL PROJECT COST	AMOUNT OF COUNTY FUNDS REQUESTED	PERCENT OF COUNTY FUNDS TO TOTAL PROJECT COST
\$4,130,000.87-	\$850,000.	20.6%

Lynette Porior-Arce  
Signature of Chief Elected Official/Organization Head

Owner  
Title

Lynette Porior-Arce  
Printed Name

August 12, 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:	606 Reeve Drive Mixed-Use Development – CASA4U, LLC
Project Address:	606 Reeve Road,
City, State, Zip:	Waunakee, WI 53597
Parcel Number:	
Census Tract:	
Project Type:	<input type="checkbox"/> New construction <input type="checkbox"/> Preservation of Existing Income & Rent-restricted Rental Housing <input type="checkbox"/> Improvement of Existing Rental Stock through acquisition and/or rehab

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.

Village of Waunakee, Dane County, Wisconsin.

The Village of Waunakee has granted full site plan and zoning approval, confirming the project's alignment with local planning and community development goals. All permits have been submitted, and the project is fully entitled to proceed upon securing final construction financing.

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 Village of Waunakee has been an active and supportive partner throughout the planning and approval process for this project. The Village Board unanimously approved the rezoning from C-2 Highway Commercial to C-1 General Commercial on July 15, 2024, and has provided guidance through site plan review and approval. Village planning staff have worked collaboratively with our architectural and engineering teams to ensure the project aligns with the community's goals for downtown growth, walkability, and housing diversity.

While there is no direct municipal funding for this development, the Village's engagement and swift approvals have been critical in moving the project forward. This partnership ensures the project is fully entitled and ready to proceed upon closing the \$3.5M construction loan, with the Dane County grant serving as the key to meeting lender requirements.

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

The Village of Waunakee does not currently have a municipal affordable housing fund or similar local financial resource available for this type of development. However, this project directly advances the Village's stated goals of increasing housing diversity, improving accessibility for residents of all ages and abilities, and supporting mixed-use developments in walkable locations. By introducing 12 residential units, including affordable units at or below 60% AMI, in close

proximity to essential services and community amenities, the project fills a critical gap in Waunakee's housing stock and supports inclusive community growth.

**D. 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 rental assistance contract, or includes income and rent-restricted units.

The proposed development at 606 Reeve Drive, Waunakee, WI is a transformational, mixed-use project replacing a long-vacant downtown lot—unused for approximately eight years—with a vibrant, two-story building featuring 12 residential units and 1,225 square feet of commercial space. Centrally located in Waunakee's downtown district, the site is within walking distance of the grocery store, post office, Village Hall, EMS building, police department, senior apartments, schools, cafés, restaurants, and churches. This walkable, amenity-rich location supports Dane County's smart growth principles and promotes reduced transportation dependence.

#### Residential Component

- 5 two-bedroom, two-bathroom units – Market rent: \$2,375/month
- 5 one-bedroom, one-bathroom units – Market rent: \$1,850/month
- 2 two-bedroom, one-bathroom units – Market rent: \$2,200/month

At least four one-bedroom units will be reserved for households earning at or below 60% of the Area Median Income (AMI) for Dane County. Affordable rents will remain below the WHEDA Standard Multifamily Project Restore Main Street Loan Estimate Worksheet (April 1, 2025) limits, less the applicable Utility Allowance, ensuring full compliance with program requirements. These units will be ideal for seniors on fixed incomes, single professionals, and individuals seeking manageable, centrally located housing. All affordable units will be identical in quality to market-rate units, featuring granite countertops, upgraded finishes, universal design elements, and elevator access.

#### Key Accessibility & Design Features

- Elevator from underground parking garage to all floors
- 17 underground parking stalls, including two EV charging stations, plus surface parking
- Universal design: grab bars in bathrooms/showers, wide hallways, open layouts for mobility devices, and barrier-free access to all units and common areas
- Premium finishes including granite countertops, high-efficiency appliances, and large windows for natural light
- Landscaped outdoor areas that promote walkability and social interaction

#### Commercial Component

The ground-floor commercial space will be the headquarters of Casa4U, LLC, a minority- and woman-owned business with 28 years in property management and 27 years in real estate sales. Specializing in bilingual (English/Spanish) real estate and insurance services, Casa4U has a proven track record serving first-time and Hispanic homebuyers. This business will generate jobs, provide culturally competent housing services, and serve as a visible example of successful local entrepreneurship.

#### Community & Economic Impact

- Supports downtown revitalization by attracting residents, increasing foot traffic, and complementing nearby businesses
- Provides high-quality, accessible, and affordable housing in a walkable, amenity-rich location
- Demonstrates sustainable design with EV charging stations, high-efficiency windows and insulation, and outdoor spaces designed to encourage community interaction

#### Jurisdiction Support

The Village of Waunakee has granted full site plan and zoning approval, confirming the project's alignment with local planning and community development goals. All permits have been submitted, and the project is fully entitled to proceed upon securing final construction financing.

What is the proposed affordability period for the project?

**Proposed Affordability**

The project will provide a minimum of four (4) one-bedroom units—one-third of the total 12 residential units—at rents affordable to households earning at or below 60% of Area Median Income (AMI), in compliance with Dane County Non-LIHTC program requirements. These units will be maintained for the full 40-year affordability period and capped at or below the WHEDA Standard MTSP 60% AMI Rent Limit for Dane County of \$1,461/month (including utilities), less the applicable Utility Allowance based on tenant-paid utilities.

Designating the affordable units as one-bedroom apartments ensures long-term financial sustainability for the project while meeting an important housing need in Waunakee—quality, centrally located homes for seniors on fixed incomes, single professionals, and individuals seeking smaller, more manageable living spaces.

All affordable units will be identical in quality to market-rate units, featuring:

- Elevator access for full building accessibility
- Universal design elements, including grab bars in bathrooms, wide hallways, and barrier-free layouts
- Premium finishes such as granite countertops, modern cabinetry, high-efficiency appliances, and large windows for natural light

The affordable units will be strategically distributed throughout the building to ensure equitable access to natural light, views, and amenities.

While the program minimum is four units, the development team will continue to evaluate the feasibility of increasing affordability to up to 50% of the building to further enhance community benefit and align with Dane County's housing diversity goals.

By delivering long-term affordable, high-quality, and fully accessible units in a walkable downtown location, the project directly addresses the shortage of centrally located, affordable housing in Waunakee and fosters a more economically diverse and inclusive community.

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

Tier 1	
<input type="checkbox"/>	Zero Energy Ready Homes
<input type="checkbox"/>	WI Green Built Gold Plus
<input type="checkbox"/>	Phius CORE
<input type="checkbox"/>	Enterprise Green Communities (EGC) Plus
Tier 2	
<input type="checkbox"/>	Green Built Gold Net Zero
<input type="checkbox"/>	Phius Zero
<input type="checkbox"/>	Living Building Challenge
<input type="checkbox"/>	LEED Zero Energy

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

ON OR BEFORE	MILESTONES
October 2024	Land acquisition completed
June 2025	Engineering and architectural design completed; Village of Waunakee project approval received.
August 2025	Permit applications submitted (building, zoning, utilities)
September 2025	Contractor bids received and reviewed
October 2025	Contractor selected; all permits approved
December 2025	Grant award notifications; construction financing close
Jan-Feb 2026	Site preparation, excavation, and foundation work
March - May 2026	Framing and building envelope construction
June- August 2026	Interior build-out, MEP (mechanical, electrical, plumbing) installation.
August 2026	Marketing and advertising for residential/commercial leasing begins
September 2026	Substantial completion; final inspections
October 2026	Certificate of Occupancy issued
November 2026	Lease-up begins for residential and commercial units

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

Property management services for the development will be provided directly by Casa4U, LLC, which will operate its main office on the ground floor commercial space of the building. This ensures residents have immediate, on-site access to management staff during regular business hours, as well as a direct point of contact for urgent needs.

On-Site Office Hours:

- Monday–Friday: 9:00 a.m. – 5:00 p.m.
- Saturday: By appointment
- Sunday: Closed (emergency contact available)

After-Hours Support:

A 24/7 emergency phone line will be available for issues requiring immediate attention, including maintenance emergencies, security concerns, or urgent tenant needs.

Benefits to Tenants:

- Ability to meet face-to-face with property management without leaving the building.
- Prompt response times for maintenance requests and resident concerns.
- Enhanced community engagement through informal interaction with management staff in shared spaces.

Because the property management team will work from the same building, tenants will enjoy an exceptional level of access, responsiveness, and personal connection—fostering a safe, well-maintained, and community-oriented living environment.

**H. 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.

With over 25 years of property management experience, we have a proven track record of helping residents find practical solutions to avoid eviction. Our philosophy is solution-focused, grounded in the belief that everyone faces challenges in life and that stable housing is the cornerstone of long-term well-being.

**Approach and Philosophy**

We work closely with tenants to address issues early, often before they escalate into a legal matter. Being located on-site in the ground-floor office allows us to be easily accessible for confidential, face-to-face conversations. We prioritize tenant privacy, creating a safe and respectful space where residents can share concerns without fear of judgment. This respectful approach helps residents maintain their dignity while navigating challenges, and fosters trust that leads to collaborative problem-solving.

**Support Strategies**

**Resource Navigation:** We connect tenants with assistance programs, including utility support (electric bill relief), rental assistance funds, food outreach programs, and other community-based resources.

**Flexible Payment Plans:** We design repayment schedules that address arrears in manageable installments, allowing tenants to remain housed while resolving financial obligations.

**Referrals to Local Services:** Through established relationships with community partners, we can quickly refer tenants to organizations that address financial, health, or family-related needs.

**Early Intervention:** We initiate communication as soon as a potential concern is identified, preventing small issues from growing into crises.

This approach fully aligns with Dane County's Fair Tenant Selection Criteria and housing stability goals by ensuring tenants are treated fairly, supported holistically, and given every opportunity to remain in their homes. Our commitment to compassion, privacy, and problem-solving not only benefits residents but also sustains a stable, positive community and reduces the social and financial costs of eviction.

**I. LANGUAGE & INFORMATION ACCESS:** Describe project's policies 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.

The project is committed to ensuring that all applicants and tenants—regardless of language proficiency or ability—have equal access to information, services, and housing opportunities.

**Language Access**

With decades of experience serving diverse communities, our property management team is fully bilingual in English and Spanish, enabling direct communication with Spanish-speaking applicants and tenants without the need for third-party interpreters. All essential documents, including lease agreements, notices, and tenant handbooks, will be provided in both English and

Spanish. For other languages, we will utilize qualified interpretation and translation services to ensure comprehension at every stage of the housing process.

Our commitment to language access and cultural competence has been recognized by the community—in 2015, we were honored as the Spanish Entrepreneur of the Year by the Latino Chamber of Commerce for outstanding service, leadership, and support of bilingual housing and business services.

#### Accessibility for Individuals with Disabilities

We will provide information and services in alternative formats to meet the needs of individuals with physical, hearing, speech, or visual impairments, including:

- Providing documents in large print, Braille, or accessible electronic formats upon request
- Offering assistive listening devices or sign language interpretation for meetings as needed
- Ensuring our on-site office is fully ADA-compliant for physical accessibility

#### Communication Procedures

- Maintain a dedicated phone line and email for tenant inquiries, with the ability to request communication in a preferred language or format
- Train all staff on cultural competence, respectful communication, and ADA compliance to ensure sensitive handling of language and accessibility needs
- Post multilingual signage in common areas, including instructions for requesting accommodations or translations

These practices directly support Dane County's equity and inclusion goals by eliminating communication barriers, ensuring accessibility for all, and fostering a housing environment that is inclusive, respectful, and responsive to the diverse needs of the community. This commitment aligns with the project's universal design features—including elevator access, grab bars, wide hallways, and barrier-free layouts—ensuring every household can fully enjoy the property's amenities.

#### J. SITE CONTROL:

- a. Date Site Control Secured (or anticipated): 10/18/2024
- b. Site Specific application without Site control (check if no site control):
- c. Check if Site is Yet-To-Be Identified (targeted area proposal):

#### IF PROJECT DOES NOT HAVE IDENTIFIED SITE, SKIP TO S.

#### K. 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

The project site at 606 Reeve Drive, Waunakee, WI has received all required municipal approvals. On July 15, 2024, the Village Board approved the rezoning from C-2 Highway Commercial to C-1 General Commercial to allow for a mixed-use building as a conditional use. The site plan has been fully reviewed and approved by the Village of Waunakee, and all engineering, architectural, and planning requirements have been addressed in accordance with Village recommendations.

All permits have been submitted to the appropriate agencies and will be finalized upon securing construction financing. Construction is ready to begin immediately once the loan is released. The

Dane County grant is a critical component in meeting the lender's conditions and closing on the construction loan, which will allow groundbreaking to proceed without delay.

L. **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. If a capital needs assessment has not been completed, please detail the scope and cost of work to be completed, and how necessary rehabilitation work was determined.

The total projected cost for the 606 Reeve Drive, Waunakee, WI mixed-use development is \$4,068,234.39, which includes land acquisition, soft costs, and estimated construction costs.

Capital Investment to Date

- Land Purchase: \$430,000
- Owner Down Payment: \$120,000 (paid directly by Casa4U, LLC ownership)
- Soft Costs Paid by Owner: \$68,234.39 (engineering, architectural design, zoning applications, permit fees, builder consulting)

Estimated Construction Costs

- Construction Loan Commitment: \$3,500,000 from One Community Bank (final bid to be confirmed upon contractor selection)

Funding Sources

The project will be financed through:

- Owner Equity: \$188,234.39 (down payment plus soft costs already paid)
- Construction Loan: \$3,500,000 (committed by One Community Bank)
- Dane County Grant Request: \$850,000 (final funding piece to close the gap and fund contingency)

Use of Funds

Grant funding will be applied directly toward construction costs, site improvements, and contingency reserves to address potential cost escalation. This support is critical to maintaining the project's full scope — including the delivery of four long-term affordable one-bedroom units reserved for households earning at or below 60% AMI. These affordable units, while meeting full WHEDA rent compliance, will still be built to the same high-end standards as market-rate units, including granite countertops, upgraded finishes, universal design features, and elevator access.

Capital Needs Summary

The Dane County grant is the final piece of the financing package, enabling the release of the \$3.5 million construction loan and ensuring the project's financial feasibility at current interest rates. With all zoning, site plan, and building approvals secured, and permits submitted, the project is shovel-ready. Grant funding will allow groundbreaking to occur immediately upon loan closing, delivering 12 residential units — including the four long-term affordable 1BRs — and a ground-floor commercial space in a fully accessible, walkable downtown location.

M. **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:		606 Reeve Road, Waunakee WI 53597										
% of County Median Income (CMI)	Total # of Units	# of Bedrooms						Projected Monthly Unit, including Utilities				
		# 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%			4						1,140.		
<b>Total Units</b>								Notes:	Four 1BR units restricted to ≤60% AMI per WHEDA MTSP (4/1/25), tenant-paid utilities; remaining units are market rate."		

\*40% = 31 to 40% CMI, 50% = 41% - 50% CMI, 60% = 51-60% CMI

ADDRESS #2:		# of Bedrooms							Projected Monthly Unit, including Utilities			
% of County Median Income (CMI)	Total # of Units	# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs	\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs	
≤30%												
40%												
50%												
60%	4		5	0				1850	2200/2375			
Market	8		1	7								
<b>Total Units</b>	<b>12</b>		<b>5</b>	<b>7</b>				Notes:				

\*40% = 31 to 40% CMI, 50% = 41% - 50% CMI, 60% = 51-60% CMI

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

<input type="checkbox"/>	Community Building, square feet:
<input type="checkbox"/>	Community Room, square feet:
<input type="checkbox"/>	Garages, number: and monthly rent:
<input checked="" type="checkbox"/>	Surface parking, number: and monthly rent: 0.00
<input checked="" type="checkbox"/>	Underground parking, number 17 and monthly rent: 15 at \$60 each and 2 ev parking \$125.

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

accessibility, and support sustainable living, including:

- Elevator service from the underground parking garage to all floors
- 17 underground parking stalls, including two EV charging stations, plus surface parking for guests
- Secure bicycle storage to encourage active transportation
- Landscaped outdoor areas with seating to promote social interaction and community building
- Universal design features throughout the building, including wide hallways, barrier-free layouts, and grab bars in bathrooms
- High-quality finishes such as granite countertops, modern cabinetry, and large windows for natural light
- On-site property management office for immediate tenant support

**P. RELOCATION:** Will any businesses, including churches and non-profits, or residential tenants (owner or renter 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.

o relocation will occur. The project site has been vacant for approximately eight years and does not currently contain any businesses, nonprofits, or residential tenants. As such, no individuals or organizations will be displaced temporarily or permanently, and no relocation assistance is required.

## LOCATION

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

The project is located in the heart of downtown Waunakee, offering residents walkable access to a wide range of essential services, recreation, and employment opportunities. Within blocks of the site are grocery, retail, medical, dental, banking, and community services, along with multiple childcare options, parks, and recreational facilities. The central location promotes walkability, reduces reliance on cars, and aligns with Dane County's housing equity and smart growth goals.

The Waunakee Village Center—a short walk from the project—serves as both a public recreation facility and a senior center, offering fitness classes, wellness programs, cultural activities, and a full calendar of community events. Seasonal Farmers Markets are held across the street, providing fresh, local produce and artisan goods. Residents can also enjoy numerous restaurants, cafes, and shops nearby, along with multiple churches representing diverse faith traditions.

Recreational opportunities in Waunakee are extensive. Facilities include an indoor ice skating rink, bowling alley, and the Waunakee Area Soccer Club with several outdoor fields. Parks such as Ripp Park and Centennial Park offer trails, playgrounds, and open space for walking, biking, and sports. The Village has also announced plans for a community swimming pool to be completed within the next year, further enhancing the area's recreational offerings.

The community supports a range of local and regional employers, including: Scientific Protein Laboratories, RenewAire, Nord Gear Corporation, Endres Manufacturing Company, Dane Manufacturing Company, Suttle-Straus, Uniek, Octopi Brewing, and Gruber Manufacturing, Inc. These employers, along with retail and service businesses in the downtown area, offer stable jobs in manufacturing, logistics, and customer service—many within walking or biking distance.

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	Piggly Wiggly Waunakee	.1
Public Elementary School	Heritage Elementary	.6
Public Middle School	Waunakee Middle School	.8
Public High School	Waunakee High School	.8
Job-Training Facility, Community College, or Continuing Education Programs	Madison College Traux Campus	8 miles

Childcare	Inspire Early Childhood Village Early Childhood Center Moppet Playhouse Adventures in Learning La Petite Academy Brilliant Beginnings Waunakee KinderCare	.9 .5 .4 .7 1.0 1.1 .9
Public Library	Waunakee Public Library	.3
Neighborhood, Community, or Senior Center	Waunakee Senior Center/Village Center	.3
Full Service Medical Clinic or Hospital	UW Healath Waunakee Clinic Dean Health Waunakee First Choice Dental Karl's Family Dentistry	.3 .5 .3 .5
Pharmacy	Walgreens Hometown Pharmacy	.2 .1
Public Park or Hiking/Biking Trails	Village Park Ripp Park Centennial Park	.4 1. .7
Banking	BMO Harris Lake Ridge Bank US Bank One Community Bank	.2 .1 .4 1.
Retail	Waunakee Shopping Center Main Street/Down Town Shopping	.1 .2
Other (list the amenities)	Gas Stations all with stores - 5 locations. Seasonal Amenities - Waunakee Farmers Market	.2-1.0 mile away .1 (across the street)

**R. 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.

Despite the absence of fixed-route public transit in Waunakee, the project's location offers exceptional connectivity, safety, and convenience for residents of all ages.

The downtown site provides residents with walkable and bikeable access to a wide range of employment opportunities, including restaurants, retail, manufacturing, and service-sector jobs. Most major employers in the community—such as Endres Manufacturing, Scientific Protein Laboratories, RenewAire, Nord Gear Corporation, and Suttle-Straus—are located within a 5- to 7-minute drive or a short bike ride from the property.

For those with automobiles, regional employment hubs such as Middleton, Sun Prairie, and downtown Madison are reachable within 15–25 minutes via Highway 19 and Highway 113, offering access to jobs in healthcare, education, technology, manufacturing, and service industries.

The location also benefits from an extensive sidewalk network, dedicated bike lanes, and nearby trails, enabling car-free commuting to many local jobs, particularly in the downtown core and surrounding industrial areas.

Importantly, the property is located on the public school bus route, ensuring safe and reliable transportation for children to and from school. This eliminates the need for long walks along busy roads, supporting both health and safety for families.

This combination of proximity, infrastructure, school transportation access, and diverse employment options ensures that residents—including lower-income households—have multiple, low-cost, and safe ways to access work, school, and community services.

### IF PROJECT HAS IDENTIFIED SITE, SKIP TO Y

## TARGET AREA ONLY (NO IDENTIFIED SITE)

#### S. GENERAL AREA OF PROPOSED SITE:

Explain why this area was chosen.

#### T. PROPOSED HOUSING TYPE: Describe the type of housing project you propose to develop (i.e., new construction, preservation, or acquisition and rehab).

#### U. PROPOSED UNITS: Number of Units and proposed rent/income restrictions you anticipate developing in target area.

#### V. TARGET AREA AMENITIES: Identify the distance the following amenities that exist in the area which you have identified. If an amenity/service does not exist within that area, determine and list the next location.

Type of Amenities & Services	Name of Facility	In Targeted Area? (yes/no)
Full-Service Grocery Store		
Public Elementary School		
Public Middle School		
Public High School		
Job-Training Facility, Community College, or Continuing Education Programs		
Childcare		

Public Library		
Neighborhood, Community, or Senior Center		
Full Service Medical Clinic or Hospital		
Pharmacy		
Public Park or Hiking/Biking Trails		
Banking		
Retail		
Other (list the amenities)		

W. **NEIGHBORHOOD ENGAGEMENT:** Describe your familiarity with this neighborhood and community. Have you previously worked with the Neighborhood Association or elected representatives? Describe the response of the Association or elected representative(s), if applicable. What issues or concerns with the anticipated project have been identified, if any? How will these be addressed?

We have a long-standing connection to the Waunakee community and have worked closely with local leaders throughout the planning of this project. The development has received full approval from the Village of Waunakee, reflecting strong alignment with community planning goals and confidence in our ability to deliver a high-quality, beneficial project.

The site's location is ideally situated for community connectivity—next to the grocery store and post office, across from Village Hall and the shopping mall, and directly behind the EMS building and police department. Senior apartments are located nearby, and residents will be within walking distance of cafes, restaurants, and other daily conveniences. The property is also walkable to multiple schools in the area, with school bus service available, and is just steps away from several churches and community gathering spaces.

#### Community Response

There has been no opposition to the project. Feedback from Village officials, local business owners, and residents has been highly positive, noting that the development will be a welcome improvement to a long-vacant lot. The building's attractive design, generous green space, and appealing streetscape will enhance the visual character of the downtown area and create a positive impression for both residents and visitors.

#### Ongoing Engagement

We will maintain open communication with the Village and surrounding community throughout construction and occupancy. Should any concerns arise, we will address them promptly and collaboratively, ensuring the project continues to be an asset to the neighborhood.

This development is designed to blend seamlessly into its surroundings while providing much-needed housing and commercial space, reinforcing Waunakee's vision for a vibrant, inclusive, and connected downtown.

X. **SUPPLY:** Are there adequate sites available in this targeted area that can feasibly be identified and developed within the timeframe listed in the Guidelines? Please explain how you anticipate selecting a site.

The project site at 606 Reeve Drive, Waunakee, WI has already been fully secured and received complete approval from the Village of Waunakee, including all necessary zoning and site plan authorizations. This ensures the project is ready to proceed within the timeframe outlined in the guidelines, with no delays anticipated due to site selection or entitlement processes.

The location was strategically chosen for its prime downtown position—adjacent to the grocery store and post office, across from Village Hall and a shopping mall, and in close proximity to the EMS building, police department, senior apartments, cafes, and restaurants. The site also benefits from excellent access to schools, with school bus service available and several schools within safe walking distance. Additionally, multiple churches and community gathering spaces are within a short walk, further enhancing the site's appeal for residents seeking convenience and community connection.

This walkable, service-rich environment makes the site ideal for both residential and commercial tenants, aligning perfectly with Dane County's smart growth and community development goals. Because the site is already owned, approved, and construction-ready, we can proceed directly to the next stages of development upon funding approval, maximizing efficiency and ensuring timely delivery of affordable, accessible housing in Waunakee's downtown district.

## PROJECT APPROACH

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

The success of this project is supported by a network of established partnerships spanning municipal agencies, professional consultants, community organizations, and financial institutions.

- Municipal Collaboration – The Village of Waunakee has been an active partner through zoning, site plan, and building approvals, ensuring the project aligns with community growth, housing diversity, and downtown revitalization goals.
- Design and Construction Partners – The development team includes:
  - o Vierbicher Engineering – civil engineering, site planning, and infrastructure design
  - o Little Creek Construction – general contractor with extensive experience in mixed-use and multi-family development
  - o One Design and Engineering, LLC – architectural and structural design services, specializing in universal design and accessibility integration
- These partners have collaborated to deliver a high-quality, accessible building that incorporates sustainable building features, long-term affordability, and aesthetic compatibility with the surrounding downtown.
- Financial Partners – One Community Bank has committed to providing the \$3.5M construction loan contingent upon securing the Dane County grant, demonstrating strong lender confidence.
- Property Management – Casa4U, LLC, a minority- and woman-owned business with 28 years in property management and 27 years in real estate, will oversee all leasing and ongoing operations, ensuring compliance with affordability requirements and delivering exceptional tenant service.
- Community Resource Networks – Ongoing relationships with the Latino Chamber of Commerce, the Apartment Association of South Central Wisconsin, and local non-profits ensure

that residents can connect to housing stability programs, workforce development opportunities, and social services.

These partnerships collectively ensure that the project is not only financially and logically viable but also responsive to the community's needs, resulting in a development that delivers long-term social, economic, and housing benefits to Waunake

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

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

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

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

Yes	No
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<input checked="" type="checkbox"/>	<input type="checkbox"/>
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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 in-person appeal meeting and an opportunity to dispute the accuracy and relevance of the report, which is already required of HUD assisted housing providers. See 24 C.F.R. § 982.553(d), which applies to public housing agencies administering the Section 8 rent assistance program.
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.

**BB. 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
<input checked="" type="checkbox"/>	<input type="checkbox"/>

<b>a.</b>	<b>Security Deposits.</b> The amount of a security deposit shall not be more than one month's rent.
<b>b.</b>	<b>Late Fees and Other Fees.</b> Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent.
<b>c.</b>	<b>All other fees.</b> 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.)
<b>d.</b>	<b>Rights of Youth to Access Common Spaces.</b> Youth under the age of 18 are allowed to use and enjoy common areas without supervision. This does not preclude reasonable rules in ensure the safety of children and youth.
<b>e.</b>	<b>Written Notice for Termination of Tenancy.</b> 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.
<b>f.</b>	<b>Good Cause for Termination.</b> A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined to 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.
<b>g.</b>	<p><b>Reasonable Guest Rules.</b> Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not limited to the following: (1) Prior authorization of guests by the property management, unless the guest is staying for an extended period of time (e.g. more than 2 weeks); (2) Prohibition on overnight guests; (3) Requiring that the resident be with the guest at all times on the property. (4) Requiring guests to show ID unless requested by the tenant. (5) Subjecting caregivers, whether caring for a child or children, or an adult with disabilities, to limitations on the number of days for guests.</p> <p>Landlord may ban a person who is not a tenant from the rental premises if the person has committed violent criminal activity or drug related criminal activity at rental premises. No person shall be banned from the rental premises without the consent of the tenant unless the following have taken place:</p> <p>(1) A notice of the ban is issued to the tenant stating the:</p> <ul style="list-style-type: none"> <li>(a) name of the person banned,</li> <li>(b) grounds for the ban including, (i) the specific facts detailing the activity resulting in the ban; (ii) the source of the information relied upon in making the ban decision; and (iii) a copy of any criminal record reviewed when making the ban decision; and</li> </ul>

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

**CC. PARTNERHNG TO END HOMELESSNESS:** In the space below, indicate the project's willingness to partner with Homeless Services Consortium (HSC) member agencies and to end homelessness for individuals and /or families by providing a preference for households experiencing homelessness.

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

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

Describe how the project will work with partners to provide households with rental subsidies or maintain rents at or below 30% rent limits for the period of affordability.

What additional barriers can the project remove to ensure households experiencing homelessness are able to access targeted units (e.g. waiving of screening criteria).

## SUPPORTIVE SERVICES:

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

Supportive Services Partner:	Local social service providers and nonprofit agencies, coordinated through the property management office. Examples include Dane County Department of Human Services, veterans' service organizations, and domestic violence advocacy groups.		
Total annual budget for supportive services at project:	\$0 (services provided by outside agencies at no direct cost to the project).		
Amount of annual funding <b>project and/or developer</b> will provide directly to supportive services at project:	\$0 (in-kind contributions via dedicated meeting space and coordination).		
Full-Time Equivalent position(s) dedicated to providing services at project:	0 (services delivered by partner agencies as needed).		
Number of estimated weekly on-site hours of supportive services provided by identified partner:	By appointment only, typically 2–4 hours/week when scheduled.		
Project will provide on-site services in a dedicated space:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes
	<input type="checkbox"/>		No

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

Yes – the ground-floor meeting room will be available for private appointments between tenants and service providers. Casa4U, LLC, with 28 years of property management experience, has a long history of working with diverse tenant populations, including older adults, veterans, and survivors of domestic violence, and has successfully coordinated with external agencies to connect tenants to financial counseling, healthcare resources, and crisis intervention services. The on-site office and meeting room will provide a private, accessible location for tenants to meet with case managers, counselors, or advocates in a safe and confidential environment.

**FF. 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%						
40%						

50%						
60%	4		4			

**GG. PREFERENCES:** If the project will be targeting a set number of units, will the project require that these households meet additional preferences? Indicate all anticipated preferences below.

<input checked="" type="checkbox"/>	Persons with disabilities	<input checked="" type="checkbox"/>	Veterans
<input type="checkbox"/>	Household experiencing chronic homelessness	<input checked="" type="checkbox"/>	Individuals recovering from physical abuse, domestic violence, dating violence, sexual assault or stalking
<input checked="" type="checkbox"/>	Other: Seniors		

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.

If more than one preference applies, tenants will be considered for all applicable categories, with selections made based on application date, eligibility, and unit availability.

**HH. 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.

Services available to tenants will be voluntary and will include:

- Referrals to veterans' benefits assistance and support programs.
- Connections to domestic violence advocacy services and crisis hotlines.
- Coordination with disability support organizations for mobility assistance, in-home care referrals, and adaptive equipment.
- Financial literacy workshops, benefits navigation, and housing counseling.
- Emotional and mental health counseling referrals.

Services will be offered to both supportive housing-eligible tenants and the broader tenant population upon request.

**II. 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.

Our strategy for supporting tenant housing retention is built on early intervention, direct communication, and strong connections to community resources. If a tenant faces a potential lease violation or is at risk of losing housing, our on-site property management team immediately engages them in a private, solution-focused conversation to identify the root cause and develop a corrective plan.

Early Outreach: Initiate contact within 5 days of a missed payment or reported concern.

Individualized Solutions: Offer tailored payment plans, coordinate with utility assistance programs, and connect residents with rental assistance funds.

Referrals to Services: Direct tenants to food programs, employment resources, counseling services, and other supports to stabilize their housing.

Ongoing Monitoring: Maintain follow-up meetings until the issue is resolved, ensuring tenants remain engaged and supported.

**JJ. 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.

Our on-site property management staff regularly participates in professional development to enhance service delivery and cultural competency. Training topics include:

Case Management Basics – identifying needs, setting goals, and tracking progress.

Community Networking – building resource partnerships for tenants.

De-escalation and Conflict Resolution – preventing disputes from escalating.

Trauma-Informed Care – recognizing and responding to past trauma in a supportive way.

Cultural Competency – ensuring all communication and services are respectful of diverse backgrounds; informed by our experience serving bilingual households.

Fair Housing Compliance – staying current with all local, state, and federal requirements.

Training frequency is quarterly, with supplemental workshops offered through our membership in the Apartment Association of South Central Wisconsin.

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

Tenants will access services directly through our on-site office, located on the ground floor of the building, during standard business hours. Our team will provide confidential, one-on-one meetings to discuss needs, explore solutions, and coordinate resources.

If a service requires off-site engagement (e.g., specialized counseling, medical assistance, or government program enrollment), tenants will receive:

- Printed and digital resource guides in English and Spanish.
- Direct referrals and warm hand-offs to partner agencies.
- Follow-up meetings to confirm successful connection to services.

This approach ensures tenants are not left to navigate complex systems alone, improving the likelihood of resolving challenges before they jeopardize housing.

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 tenant's needs require off-site community supports, our property management team will ensure they receive clear, timely, and ongoing information about available resources both before and after the need arises. This will include:

- Proactive Information Sharing: At move-in, each tenant will receive a printed and digital resource guide—available in English and Spanish—with contact information for local service providers, including rental assistance, utility support, food programs, healthcare resources, and senior services.
- Warm Referrals: When a specific need is identified, staff will make direct introductions to partner agencies, assist with appointment scheduling, and provide necessary documentation to facilitate access.

- Follow-Up Support: Staff will check in with tenants after the referral to ensure they have successfully connected with the service and to address any barriers.
- Ongoing Updates: Resource lists will be updated quarterly to reflect new programs, funding opportunities, or changes in provider contact information.

This proactive and follow-up-based approach ensures tenants are aware of the support systems available to them before a crisis occurs, and have the guidance and encouragement they need to successfully navigate those systems when challenges arise.

**LL. 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.):

On-site property management and support services will be available:

- Monday–Friday: 9:00 a.m.–5:00 p.m. (walk-in or appointment)
- Saturday: By appointment
- Sunday: Closed (emergency contact available 24/7)

Tenants can access emergency maintenance and crisis support after hours via a dedicated 24-hour phone line.

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

We will collaborate with community service providers in Dane County—including housing assistance agencies, employment training programs, food banks, and senior support services—to ensure residents have access to a full spectrum of resources. Our approach includes:

- Maintaining an updated directory of verified local resources.
- Establishing direct communication lines with partner agencies for rapid referrals.
- Participating in community housing network meetings to stay informed about emerging programs and funding opportunities.
- Tracking referrals and outcomes to improve service coordination over time.

Our long-standing relationships with local nonprofits, government agencies, and the Latino Chamber of Commerce further strengthen our ability to connect residents with the right services quickly, effectively, and respectfully.

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

<input type="checkbox"/>	Portion of developer fee	<input type="checkbox"/>	Annual Operating Support
<input type="checkbox"/>	Payments out of available cash flow	<input checked="" type="checkbox"/>	Other: In-kind contribution of dedicated meeting space and coordination with partner agencies

Supportive services will be provided at no direct cost to the project through partnerships with local nonprofit and government agencies. The developer will contribute in-kind support by providing dedicated meeting space within the building and coordinating access for partner agencies to meet with tenants by appointment. This model ensures high-quality supportive services without impacting operating costs or tenant rents.

**OO. 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.

While Casa4U, LLC does not directly operate social service programs, its property management team has successfully coordinated with local service providers for more than two decades, connecting tenants to programs with proven housing retention rates exceeding 90% among participants. Partner agencies have consistently demonstrated the ability to assist tenants in maintaining stable housing, accessing healthcare, securing employment, and resolving crisis situations without eviction.

**PP. 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 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.

Casa4U, LLC will maintain open communication with supportive service partners through scheduled check-ins and on-demand coordination when a tenant issue arises. With 28 years of experience in property management, Casa4U has a strong track record of early intervention to address financial, health, or safety concerns before they escalate. The on-site office and meeting room will allow service providers to meet privately with tenants, fostering trust and confidentiality. Past collaborations have resulted in tenants receiving timely rental assistance, connecting to counseling, and avoiding eviction, ultimately maintaining stable housing and community ties.

## EXPERIENCE AND QUALIFICATIONS

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

Casa4U, LLC is a minority- and woman-owned real estate, insurance, and property management company with more than 25 years of experience in managing, developing, and marketing residential and commercial properties in Dane County and surrounding areas. Our leadership team has successfully overseen projects ranging from single-family homes to mixed-use developments, with a focus on quality, accessibility, and community impact.

For this project, we have assembled a highly qualified building team that includes experienced engineers, architects, and a proven general contractor. Combined with our own extensive background in real estate development and property management, this team brings deep knowledge of design, construction, leasing, and long-term operations. This collective expertise ensures the project will be delivered on time, within budget, and built to the highest standards—positioning it for long-term durability and low maintenance costs.

We are also active members of the Apartment Association of South Central Wisconsin, which allows us to stay current with Wisconsin property management requirements, best practices, proper legal forms, and recommended procedures. This ongoing professional engagement ensures our operations

remain fully compliant with evolving laws while maintaining the highest standards of professionalism and service.

Our bilingual service capabilities (English/Spanish) and cultural competence—recognized in 2015 by the Latino Chamber of Commerce as Spanish Entrepreneur of the Year—enable us to effectively reach and serve underrepresented populations, including first-time renters, seniors, and immigrant households..

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

The ongoing property management will be provided directly by Casa4U, LLC, operating from an on-site office located in the building's ground-floor commercial space. This ensures daily in-person access for residents and immediate responsiveness to maintenance and administrative needs.

With over two decades of hands-on property management experience, our team has:

Managed a diverse portfolio of residential, commercial, and mixed-use properties, including affordable housing units.

Successfully implemented eviction-prevention strategies, payment plans, and resource referrals that prioritize housing stability.

Maintained compliance with local, state, and federal housing regulations, including Dane County's Fair Tenant Selection Criteria.

Delivered exceptional tenant service, resulting in high retention rates and strong community relationships.

Our membership in the Apartment Association of South Central Wisconsin provides ongoing access to up-to-date property management requirements, proper legal documentation, and procedural recommendations—ensuring our practices remain compliant and effective.

By combining an experienced, locally engaged management team with an on-site presence, we will ensure the property is well-maintained, responsive to resident needs, and managed to the highest standards for the full 40-year affordability period. This long-term stewardship approach will protect the County's investment, sustain the building's value, and preserve quality housing for future generations.

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

The property will be managed directly by Casa4U, LLC, the project developer and owner, which has 28 years of experience in property management and 27 years in real estate sales and development. Management operations will be based in the on-site office, allowing for daily interaction with tenants and immediate response to maintenance, leasing, and resident service needs. An administrative assistant will be hired as the property stabilizes, selected through a competitive process based on relevant property management experience, customer service skills, and the ability to communicate in multiple languages to serve a diverse tenant population.

Experience and Qualifications

The development and management of 606 Reeve Drive will be led by Casa4U, LLC, a minority- and woman-owned business with 28 years of property management experience and 27 years in real estate sales and development. The ownership team has successfully managed a diverse portfolio of residential and commercial properties, including market-rate and affordable units, mixed-use developments, and properties with accessibility features for seniors and individuals with disabilities. Casa4U's experience extends to project planning, zoning approvals, contract negotiations, and long-term asset management, ensuring the successful delivery and ongoing operation of complex developments.

Casa4U is an active member of the Apartment Association of South Central Wisconsin, staying current on Wisconsin property management regulations, required forms, and best practices. The company also leverages its strong relationships with architectural, engineering, and construction partners to ensure high-quality building standards and efficient project execution.

#### Property Management

Casa4U, LLC will manage the property directly from the on-site office, providing daily oversight and immediate response to tenant needs, maintenance requests, and leasing inquiries. This hands-on approach allows management to maintain strong relationships with residents, address issues promptly, and ensure the building remains in excellent condition. As the property stabilizes, an administrative assistant will be hired to support operations, selected through a competitive process that prioritizes proven property management skills, customer service experience, and the ability to communicate in multiple languages to serve a diverse tenant population effectively.

## PROJECT FINANCING

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

SOURCE	AMOUNT
Private Commercial Loan- One Community Bank, Waunakee	2,453,531.
Owner Equity (land purchase down payment + soft costs paid to date)	576,468.78
Dane County Non- LIHTC Funds (requested)	850,000.
WEDC CDI – Minority & Women-Owned Business Grant (pending)	250,000.
<b>TOTAL</b>	<b>4,130.000.</b>

USES	AMOUNT
Land Acquisition (completed)	430,000
Site Preparation & Utilities	150,000.
Construction Costs	3,200,000.
Architectural & Engineering Fees	150,000.
Permits, Fees, and Approvals	50,000.
Contingency	150,000.
<b>TOTAL</b>	<b>4,130,000.</b>

Which of the identified sources have been secured?

Owner equity totaling \$576,468.78 has been fully invested in the project to date. This includes the \$430,000 land acquisition cost (paid in full) and \$146,468.78 in paid soft costs such as earnest money, engineering, architectural design, municipal review fees, planning department costs, property

taxes, and other pre-development expenses (see attached spreadsheet for detailed itemization). The land acquisition is complete with clear title secured.

A conditional commitment for a \$2,453,531 commercial construction loan from One Community Bank in Waunakee is in place, contingent upon securing the remaining capital stack through the requested Dane County Non-LIHTC funds and other pending sources.

In addition to the Dane County request, the project has an application pending for the Wisconsin Economic Development Corporation (WEDC) Community Development Investment (CDI) – Minority and Women-Owned Business Grant in the amount of \$250,000. If awarded, these funds will further strengthen the project's financial stability and reduce the private financing required.

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

Dane County Non-LIHTC funds in the amount of \$850,000 are essential to closing the project's financing gap and enabling construction to proceed on schedule. Without these funds, the project will face delays that could increase costs due to rising interest rates and material pricing, potentially jeopardizing the inclusion of the four permanently affordable one-bedroom units.

The County's investment will directly secure 40 years of guaranteed affordability for these units at or below WHEDA's 60% AMI rent limit, ensuring long-term housing stability for seniors on fixed incomes, single professionals, and individuals seeking centrally located, accessible housing. The grant will also leverage over \$3.2 million in private investment and deliver a mixed-use development that revitalizes a long-vacant downtown parcel, stimulates local economic activity, and establishes a minority- and woman-owned business headquarters in Waunakee's core.

By bridging this critical funding gap, Dane County's support will transform a dormant site into a vibrant, community-serving development that aligns with the County's housing diversity, equity, and smart growth goals.

**UU. 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
<b>INCOME</b>										
Gross Potential Rent	301,628.	307,661.	313,814.	320,090	326,492.	333,022.	339,682.	346,476.	353,405.	360,473.
Vacancy	15,081.	15,383.	15,691.	16,004.	16,325.	16,651.	16,984.	17,324.	17,670.	18,024.
Other Income	0	0	0	0	0	0	0	0	0	0
Total Income	286,547.	292,278.	298,123.	304,086.	310,167.	316,371.	322,698.	329,152.	335,735.	342,450.
<b>OPERATING EXPENSES</b>										
Marketing	2,400.	2,472.	2,546.	2,623.	2,701.	2,782.	2,866.	2,952.	3,040.	3,131.

Payroll	0	0	0	0	0	0	0	0	0	0
Other Administrative Costs	1200	1,236.	1,273.	1,311.	1,351.	1,391.	1,433.	1,476.	1,520.	1,566.
Management Fees	0	0	0	0	0	0	0	0	0	0
Utilities	3,600	3,708.	3,819.	3,934.	4,052.	4,173.	4,299.	4,428.	4,560.	4,697.
Security	0	0	0	0	0	0	0	0	0	0
Maintenance Expenses	11,600.	11,948.	12,306.	12,676.	13,056.	13,448.	13,851.	14,267.	14,695.	15,135.
Property Taxes	54,000	55,620.	57,289.	59,007.	60,777.	62,601.	64,479.	66,413.	68,406.	70,458.
Insurance	6,000.	6,180.	6,365.	6,556.	6,753.	6,956.	7,164.	7,379.	7,601.	7,829
Reserves for Replacement	3600	3,708.	3,819.	3,934.	4,052.	4,173.	4,299.	4,428.	4,560.	4,697.
Total Operating Expenses	82,600	85,078.	87,630.	90,259.	92,967.	95,756.	98,629.	101,588.	104,635.	107,774.
Net Operating Income	203,947	207,200.	210,493.	213,826.	217,200.	220,615.	224,069.	227,564.	231,100.	234,675.
Debt Service	129,926.	129,926	129,926	129,926	129,926	129,926	129,926	129,926	129,926	129,926
Asset Management	n/a									
Cash Flow	74,021	77,274.	80,567.	83,900.	87,274.	90,689.	94,143.	97,638.	101,174	104,749.
	<b>Year 11</b>	<b>Year 12</b>	<b>Year 13</b>	<b>Year 14</b>	<b>Year 15</b>	<b>Year 16</b>	<b>Year 17</b>	<b>Year 18</b>	<b>Year 19</b>	<b>Year 20</b>
<b>INCOME</b>										
Gross Potential Rent	367,683.	375,037.	382,537.	390,188.	397,992.	405,952.	414,071	422,352.	430,799.	439,415.
Vacancy	18,384.	18,752.	19,127.	19,509.	19,900.	20,298.	20,704	21,118.	21,540.	21,971.
Other Income	0	0	0	0	0	0	0	0	0	0
Total Income	349,299	356,285.	363,410.	370,679.	378,092.	385,654.	393,367.	401,234.	409,259.	417,444.
<b>OPERATING EXPENSES</b>										
Marketing	3,225.	3,322.	3,422.	3,524.	3,630.	3,739.	3,851.	3,967.	4,086.	4,208.
Payroll	0	0	0	0	0	0	0	0	0	0
Other Administrative Costs	1,613	1,661.	1,711.	1,762.	1,816.	1,870.	1,926.	1,983.	2,043.	2,104.
Management Fees	0	0	0	0	0	0	0	0	0	0
Utilities	4,838.	4,983.	5,133.	5,287.	5,445.	5,609.	5,777.	5,950.	6,129.	6,313.
Security	0	0	0	0	0	0	0	0	0	0

Maintenance Expenses	15,589.	16,057.	16,539.	17,035.	17,546.	18,072.	18,615.	19,173.	19,748.	20,341.
Property Taxes	72,571.	74,749.	76,991.	79,301.	81,680.	84,130.	86,654.	89,254.	91,931.	94,689.
Insurance	8,064.	8,305.	8,555.	8,811.	9,076.	9,348.	9,628.	9,917.	10,215.	10,521
Reserves for Replacement	4,838.	4,983.	5,133.	5,287.	5,445.	5,609.	5,777.	5,950.	6,129.	6,313.
Total Operating Expenses	111,007.	114,338.	117,768.	121,301.	124,940.	128,688.	132,549.	136,525.	140,621.	144,840.
Net Operating Income	238,291.	241,947.	245,643.	249,378.	253,152.	256,966.	260,818.	264,709.	268,638.	272,605.
Debt Service	129,929.	129,929.	129,929.	129,929.	129,929.	129,929.	129,929.	129,929.	129,929.	129,929.
Asset Management	0	0	0	0	0	0	0	0	0	0
Cash Flow	108,365.	112,021.	115,717.	119,452.	123,226.	127,040.	130,892.	134,783.	138,712.	142,679.