

2024 Dane County Affordable Housing Development Fund
Application for Financing

Submitted by:
Eminent Development Corporation
Julian Walters
608-235-5837
jwalters@eminentdc.com



EMINENT
DEVELOPMENT CORPORATION

Application

DANE COUNTY APPLICATION FOR 2024 AFFORDABLE HOUSING DEVELOPMENT FUND

This application should be used for project seeking Dane County AHDF funds. Applications must be submitted electronically to DCDHS Division of Housing Access by **noon on August 5, 2024**. Upload application materials to the [Dane County AHDF Dropbox](#).

APPLICATION SUMMARY

ORGANIZATION NAME	Eminent Development Corporation		
MAILING ADDRESS <small>If P.O. Box, include Street Address on second line</small>	3910 Dallas Dr Madison, WI 53719		
TELEPHONE	608-235-5837	LEGAL STATUS	
FAX NUMBER	N/A	<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	Julian Walters	Federal EIN: <u>93-4074708</u>	
INTERNET WEBSITE (if applicable)	www.eminentdc.com	Unique Entity Identifier (UEI):	
E-MAIL ADDRESS	jwalters@eminentdc.com		

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

PROJECT NAME	PROJECT CONTACT PERSON	PHONE NUMBER	E-MAIL
Park Lofts	Julian Walters	608-235-5837	jwalters@eminentdc.com

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

TOTAL PROJECT COST	AMOUNT OF AHDF FUNDS REQUESTED	PERCENT OF AHDF FUNDS TO TOTAL PROJECT COST
\$17,787,794	\$1,802,000	10%

Julian Walters

 Signature of Chief Elected Official/Organization Head

President

 Title

Julian Walters

8/5/2024

Printed Name

Date

PROJECT DESCRIPTION

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

Project Name:	Park Lofts
Project Address:	1202 S. Park Street
City, State, Zip:	Madison, WI 53715
Parcel Number:	251/0709-262-0905-2
Census Tract:	13

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

The project is set in the Bay Creek Community of Madison. Initially issued as an RFP, the development has undergone several stages of community engagement. As a respondent to the proposal and subsequent awardee, Eminent Development Corporation has organized multiple meetings to gather stakeholder input on development size, amenities, and features. Alder Tag Evers supports the project.

- 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 of Madison sold this land to developer for \$1

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

Yes, the project is eligible for municipal affordable housing resources.

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

The property located at 1202 S Park St, in Madison, WI is currently zoned CC-T (Commercial Corridor-Transitional). This zoning designation allows for the development of multifamily housing. In addition, this zoning designation allows for the proposed Park Lofts development consisting of 44 multi-family dwelling units in a mixed-use building at this location.

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

Lutheran Social Services and Eminent Development Corporation (“Developer”) is proposing a new construction, 44-unit multifamily rental housing development providing a mix of affordable and market-rate apartments located at 1202 S Park Dr, in Madison, Wisconsin. The development will consist of one 5-story apartment building targeted to persons of all ages, with 11 units targeted towards youth ages 18-24 who are aging out of foster care. Those 11 units will have project-based voucher subsidy attached to them from the Madison CDA. Proposed in-unit amenities and building attributes will include a community room, exercise room, range/oven, range hood, refrigerator, disposal, washer and dryer hookups, central air conditioning, cable TV/Internet hookups, and free in-unit Internet. The site is located near grocery stores and schools, and is down the street from Rose Park, offering sports fields/courts and playgrounds. Job growth in Dane County is high. The studios and one- and two-bedroom units in the development will meet a significant need for affordable housing in the immediate area and the region. JustDane will provide supportive services to the youth aging out of foster. Tenants will have access to the help they need through a JustDane Case Manager who will help to address their specific challenges, and arrange services, so that they may learn the skills necessary to develop and maintain a healthy, stable lifestyle. Services will include job placement assistance, resume building, goal setting, housing support, mental health support, and healthcare navigation.

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

<input checked="" type="checkbox"/>	Wisconsin Green Built Gold Standard
<input type="checkbox"/>	2020 Enterprise Green Communities Certification
<input type="checkbox"/>	ENERGY STAR Multifamily New Construction and EPA Indoor airPLUS
<input checked="" type="checkbox"/>	2020 Enterprise Green Communities Certification Plus
<input type="checkbox"/>	Passive House (PHIUS)

G. 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
September 2023	Awarded City of Madison Youth Centered Housing RFP
September 2023	ARPA Funds Committed to Project
November 2023	Site Control
January 2024	WHEDA Tax Credit App Submitted for Park Lofts
May 2024	Awarded 9% Tax Credits
November/December 2024	Dane County Affordable Housing Development Fund Award
March 2025	Construction Closing/ Construction Begins
November 2025	Substantial Completion
February 2026	Pre-lease begins

April 2026	Construction Completes
August 2026	Full lease up

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

ADDRESS #1:	1202 S. Park Street, Madison WI 53715										
	# 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%	10	2	6	2			641	687	824		
40%											
50%	7		3	4				1145	1373		
60%	27	4	11	12			1107	1301	1515		
80%											
Affordable Sub total	44										
Market											
Total Units	44						Notes:				

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

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

None of the units are using the maximum LIHTC rents for 50%, 60%, or 80% of the area median income. The project is committed to maintaining permanent affordability through a Land Use Restriction Agreement (LURA) with the City of Madison. The development team will also work with City of Madison officials to ensure approved tenant selection plans and obtain clearance for any affordable rent increases.

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

<input type="checkbox"/>	Community Building, square feet:
<input checked="" type="checkbox"/>	Community Room, square feet: 325
<input type="checkbox"/>	Garages, number: and monthly rent:
<input checked="" type="checkbox"/>	Surface parking, number: 17 and monthly rent: 0
<input type="checkbox"/>	Underground parking, number and monthly rent:

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

The project will feature a range of additional on-site amenities, including a fitness center, an on-site property manager, and a housing advocate from JustDane. Residents will benefit from free in-unit WiFi, bike storage, a trash room, and a club room with a patio. The development will also include a secured mail room and individual storage space for each unit, enhancing convenience and security for all residents.

LOCATION

K. **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 development site, located at 1202 South Park Street in the Bay Creek Neighborhood of Madison, Wisconsin, benefits from a prime, central location. It is surrounded by a mix of commercial, residential, and medical facilities.

North: The area includes restaurants like Ramen Station, the Emerson at Bay Creek Apartments, and various medical centers such as UW Health Arboretum Clinic and St. Mary's Hospital.

South: Key amenities include the Oriental Food Mart, Sofia Apartments, a Pick'n Save grocery store, and a UnityPoint Health Clinic.

West: Nearby are lightly traveled roadways like High Street and South Street, along with the SSM Health building and Fish Hatchery Road, which is surrounded by single-family residences.

East: Directly across South Park Street, there are commercial establishments like Cargo Coffee and Hansen's Auto Service, along with single-family homes.

The site offers excellent vehicular and pedestrian connectivity, public transportation access, and high visibility, making it an ideal location for multifamily housing.

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	Oriental Market	.02
Public Elementary School	Franklin Elementary School	.49
Public Middle School	James C Wright Middle School	.6
Public High School	Madison West High School	.88

Job-Training Facility, Community College, or Continuing Education Programs	Urban League of Greater Madison	.79
Childcare	South Madison Childcare Center	.64
Public Library	Goodman Public Library	.79
Neighborhood, Community, or Senior Center	Boys and Girls Club of Dane County	.74
Full Service Medical Clinic or Hospital	SSM Health Center	.48
Pharmacy	UW Health Pharmacy	.14
Public Park or Hiking/Biking Trails	Goodman Park	.46
Banking	Park Bank	.91
Retail	Target on State St	1.1
Other (list the amenities)		

- L. **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 will include a bus stop in its construction. Madison Metro will add the stop to a bus route. Residents will have access to public transit within right on site.

PROJECT APPROACH

- M. **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.

JustDane is excited to partner with Eminent Development Corporation to support youth transitioning out of foster care at 1202 S. Park St. Through this collaboration, JustDane will leverage its extensive network of community partnerships to provide vital services, including employment training, mentorship, mental health support, and counseling. These resources, made available through partnerships with organizations like the Urban League of Greater Madison, Operation Fresh Start, and Edgewood College, will also benefit other eligible residents of the development. Together, JustDane and Eminent are committed to fostering a supportive environment that empowers residents, reduces violence, and promotes overall well-being in the community.

- N. **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.

Purpose

This policy ensures that all applicants and tenants, including those with limited English proficiency (LEP) and individuals with disabilities, have equal access to information and services. The policy is in line with fair housing laws and aims to provide an inclusive environment for all.

Scope

This policy applies to all staff, contractors, and agents involved in providing services or information to applicants and tenants.

Procedures

1. Identification and Assessment of Needs

- Initial Assessment: During the application process, assess each applicant's need for language assistance or accommodations for disabilities.
- Ongoing Assessment: Continuously evaluate and document the needs of tenants for language assistance or disability accommodations.

2. Language Assistance Services

- Language Identification: Provide "I Speak" cards or similar tools to help applicants and tenants identify their preferred language.
- Translation Services: Ensure that vital documents (e.g., lease agreements, notices, application forms) are available in the primary languages spoken by applicants and tenants. Use professional translation services to maintain accuracy.
- Interpretation Services: Offer in-person or telephonic interpretation services during meetings, interviews, and other interactions. Ensure interpreters are proficient in the required languages and trained in housing terminology.
- Bilingual Staff: Hire and maintain a list of bilingual staff members who can assist LEP applicants and tenants.

3. Accommodations for Individuals with Disabilities

- Physical Accessibility: Ensure that office locations and facilities are accessible to individuals with physical disabilities. This includes ramps, elevators, accessible restrooms, and designated parking spaces.
- Hearing and Speech Impairments:

Assistive Devices: Provide assistive listening devices during meetings and interactions.

Sign Language Interpretation: Offer American Sign Language (ASL) interpretation services as needed.

o Text Telephone (TTY) Services: Provide TTY services for communication over the phone.

- Visual Impairments:

Alternative Formats: Provide documents in alternative formats such as large print, Braille, or audio recordings upon request.

Screen Reader Compatibility: Ensure digital content and websites are compatible with screen reader software.

4. Staff Training

- Regular Training: Conduct regular training sessions for all staff on providing language assistance and accommodations for individuals with disabilities. Training should cover: Awareness of LEP and disability issues.

Procedures for accessing language assistance services and accommodations.

Sensitivity and cultural competency.

- Emergency Procedures: Train staff on how to assist LEP individuals and those with disabilities during emergencies.

5. Public Awareness and Notification

- Signage: Display multilingual signs and notices in common areas to inform applicants and tenants about the availability of language assistance services and accommodations.
- Website and Digital Communication: Ensure that the website and other digital platforms provide information about available services and accommodations. Include instructions on how to request assistance.

6. Monitoring and Evaluation

- **Feedback Mechanism:** Implement a feedback mechanism for applicants and tenants to report issues or provide suggestions regarding language assistance and accommodations.
- **Regular Review:** Conduct regular reviews of the policy's effectiveness and make necessary adjustments based on feedback and changing needs.
- **Record Keeping:** Maintain records of all requests for language assistance and disability accommodations, including how they were addressed.

7. Compliance and Accountability

- **Policy Enforcement:** Ensure strict adherence to this policy by all staff, contractors, and agents.
- **Reporting Non-Compliance:** Establish a process for reporting and addressing instances of non-compliance.
- **Continuous Improvement:** Commit to ongoing improvement of services based on best practices and regulatory updates.

Conclusion

This policy is designed to ensure that all applicants and tenants receive the necessary support to access housing services and information equitably. Regular training, monitoring, and adaptation are key to maintaining an inclusive environment.

By implementing and adhering to this policy, housing providers can ensure they are meeting the needs of all applicants and tenants, fostering a more inclusive and accessible housing environment.

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

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

	Yes	No	
REQUIRED FOR FUNDING	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Lack of housing history
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located.
	<input 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 checked="" type="checkbox"/>	<input 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 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.)

- P. **DENIAL PROCESS:** Will the project incorporate the denial process detailed below? This is required for funding.

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

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
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	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.

Q. **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"/>

a.	Security Deposits. The amount of a security deposit shall not be more than one month's rent.
b.	Late Fees and Other Fees. Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent. Other penalty fees are prohibited. All other fees must be directly related to the cost for a specific amenity or service provided to the tenant and comply with all applicable laws.
c.	Rights of Youth to Access Common Spaces. Youth under the age of 18 are allow to use and enjoy common areas without supervision. This does not preclude reasonable rules in ensure the safety of children and youth.
d.	Good Cause for Termination. A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined in include the following: (i) a serious violation of the lease; (ii) repeated minor violations of the lease; or (iii) a refusal to re-certify program eligibility. Repeated means a pattern of minor violations, not isolated incidents. Termination notices and procedures shall comply with Chapter 704 of Wisconsin Statutes and federal law, when applicable. Written notice is required for non-renewal and shall include the specific grounds for non-renewal and the right of the tenant to request a meeting to discuss the non-renewal with the landlord or landlord's property management agent within fourteen (14) days of the notice. If requested, the landlord or property management agent will meet with the tenant to discuss the non-renewal, allow the tenant to respond to the alleged grounds for non-renewal, and pursue a mutually acceptable resolution.
e.	<p>Reasonable Guest Rules. Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not limited to the following: (1) Prior authorization of guests by the property management, unless the guest is staying for an extended period of time (e.g. more than 2 weeks); (2) Prohibition on overnight guests; (3) Requiring that the resident be with the guest at all times on the property. (4) Requiring guests to show ID unless requested by the tenant. (5) Subjecting caregivers, whether caring for a child or children, or an adult with disabilities, to limitations on the number of days for guests.</p> <p style="padding-left: 40px;">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 style="padding-left: 40px;">(1) A notice of the ban is issued to the tenant stating the:</p> <p style="padding-left: 80px;">(a) name of the person banned,</p> <p style="padding-left: 80px;">(b) grounds for the ban including, (i) the specific facts detailing the activity resulting in the ban; (ii) the source of the information relied upon in making the ban decision; and (iii) a copy of any criminal record reviewed when making the ban decision; and</p> <p style="padding-left: 80px;">(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 style="padding-left: 40px;">(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>

	Nothing in this policy limits a person's right to pursue a civil order for protection against another individual.
f.	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.

R. 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.)

Tenants will have access to a full time property manager who will be located on-site. The Property Manager will be available for 30 hours a week to maintain the operations of the building, Monday-Friday during daytime hours.

S. 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 10% of the total project units for referrals from Homeless Services Consortium agencies.

Park Lofts is the result of an awarded RFP issued by the City of Madison, focusing on housing for youth who have aged out of foster care and experienced homelessness. The development team will collaborate with Homeless Services Consortium agencies to identify eligible families for the set-aside units. Out of the 44 total units, 11 will be permanently reserved for young adults aged 18-24 who have experienced homelessness. These 11 units will also feature Project-Based Vouchers (PBVs) issued by the CDA to help these young adults achieve stability.

Total # of Project Units	# of Units Targeted to Individuals/Families experiencing homelessness	% of Units Targeted to Individuals/Families experiencing homelessness
44	11	25

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

During our pre-lease period, we will work with HSC to set aside units and ensure that the families eligible for our units are leased to our target demographic.

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

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

Project will not deny applicants for units targeted for individuals/families experiencing homelessness based on the following:
<ul style="list-style-type: none"> Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months
<ul style="list-style-type: none"> Lack of housing history
<ul style="list-style-type: none"> Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located.
<ul style="list-style-type: none"> Credit score
<ul style="list-style-type: none"> Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations.
<ul style="list-style-type: none"> Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water).
<ul style="list-style-type: none"> Owing money to a prior landlord or negative rent payment history if the tenant's housing and utility costs were more than 50% of their monthly income.
<ul style="list-style-type: none"> Owing money to a prior landlord or negative rent or utility payment history if applicant does one of the following: (1) establishes a regular record of repayment of the obligation; 2) signs up for automatic payment of rent to the housing provider; or (3) obtains a representative payee.
<ul style="list-style-type: none"> Wisconsin Circuit Court Access records;
<ul style="list-style-type: none"> Criminal activity, except: (i) a criminal conviction within the last two years for violent criminal activity or drug related criminal activity resulting in a criminal conviction, and (ii) if the program or project is federally assisted, criminal activity for which federal law currently requires denial. (Violent criminal activity is defined in 24 C.F.R § 5.100 and means any criminal activity that has as one of its elements the use, attempted use, or threatened use of physical force substantial enough to cause, or be reasonably likely to cause, serious bodily injury or property damage. "Drug related criminal activity is defined in Wis. Stat. s. 704.17(3m)(a)(2). "Drug-related criminal activity" means criminal activity that involves the manufacture or distribution of a controlled substance. "Drug-related criminal activity" does not include the manufacture, possession, or use of a controlled substance that is prescribed by a physician for the use of by a disabled person, as defined in s. 100.264(1)(a), and manufactured by, used, by or in the possession of the disabled person or in the possession of the disabled person's personal care worker or other caregiver.)

SUPPORTIVE SERVICES:

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

Supportive Services Partner:	JustDane
Total annual budget for supportive services at project:	\$40,000
Amount of annual funding project and/or developer will provide directly to supportive services at project:	\$40,000
Full-Time Equivalent position(s) dedicated to providing services at project:	1

Number of estimated weekly on-site hours of supportive services provided by identified partner:				40
Project will provide on-site services in a dedicated space:	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No

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

Founded in 1971 as the Madison-area Urban Ministry (MUM), now known as JustDane, our organization has a long-standing commitment to social justice and social services. JustDane, a private 501(c)(3) non-profit agency, offers a wide range of direct service programs for individuals and families involved in the criminal justice system. Our services include prison reentry programs, support for children with incarcerated parents, community events to foster understanding of the reentry experience, and jail and prison in-reach programs.

Our extensive experience is informed by the stories and struggles of the men, women, and children we serve, which allows us to effectively communicate with and educate policymakers about societal challenges and the impact of our work. We strive to create positive change that benefits the entire community. JustDane also serves as an incubator and fiscal agent for innovative ideas and projects, having developed some of the most creative and effective programs in Dane County over our forty-plus years. These include Project Home and the Madison Senior Coalitions, among others. Currently, we support a Homeless Cooperative newspaper, a neighborhood association, and a statewide social justice advocacy organization. Our work is made possible by the support of thousands of individuals who have contributed financially and through volunteer efforts over our history. We remain grateful to the visionaries who originally formed MUM and to those who continue to sustain and nurture us.

W. 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%	11	3	6	2		

X. **PREFERENCES:** Dane County AHDF requires a minimum of 10% of units provide a preference for households experiencing homelessness. Will the project require that these households meet additional preferences? Indicate all anticipated preferences below.

<input type="checkbox"/>	Persons with disabilities	<input type="checkbox"/>	Veterans
<input checked="" type="checkbox"/>	Household experiencing chronic homelessness	<input type="checkbox"/>	Individuals recovering from physical abuse, domestic violence, dating violence, sexual assault or stalking
<input checked="" type="checkbox"/>	Other: Youth who have aged out of Foster Care and are experiencing homelessness. Residents will be pulled from coordinated entry database.		

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.

Y. **SCOPE OF SERVICES:** Detail the services that will be provided to tenants and approaches supportive service partner will use to address needs of tenant population. Indicate if services are targeted only to the supportive housing units, or are available to the broader tenant population. Include what strategies the services partner(s) will use to engage tenants to support their housing retention, including if tenants have potential lease violations or housing is in jeopardy.

Services will be offered to residents aged 18-25 transitioning out of foster care at Park Lofts through the "Empower Youth Transition Program," provided by JustDane. This program offers comprehensive support to youth, empowering them with skills and resources for independent living.

JustDane will have a satellite office on-site to serve the broader tenant population and community, collaborating with property management to support tenants with minor lease violations and rent arrears. The project includes a \$20,000 reserve for security deposits for the targeted families.

The program includes:

- Case Management: JustDane Case Managers will develop Individualized Service Plans, offer crisis intervention, and provide regular check-ins.
- Employment Training: Workshops, job placement assistance, resume building, and interview skills development.
- Soft Skills Development: Communication skills, time management, goal setting, and financial literacy workshops.
- Housing Support: Independent living skills training and tenant education.
- Wrap-Around Services: Mental health support, healthcare navigation, and legal aid clinics.
- Education Support: Educational counseling and tutoring services.
- Community Engagement: Mentorship programs and recreational activities.

Data collection and outcome measurement will ensure the effectiveness of the program, with feedback mechanisms for continuous improvement. Community partnerships with local businesses, educational institutions, and nonprofits will enhance support.

The JustDane "Empower Youth Transition Program" aims to equip youth with the necessary skills, resources, and support to transition successfully into independent living, promoting dignity and enhancing tenancy in the community.

4o

Z. **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 be able to access the services on-site. JustDane will have both an office for the Housing Advocate who will be on staffed full time and a community room to carry out servicxe providing. Please see the site plans accompanied with this application for reference.

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:

--

AA. **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.):

Monday- Friday, 9am-5pm

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

<p>JustDane will collaborate with various organizations to support youth transitioning out of foster care at 1202 S. Park St. These partnerships will also be available to other eligible residents within the building. Current collaborations include:</p> <ul style="list-style-type: none"> • Employment & Training Association: Soft skills employment training and FoodShare and Employment Training support. • United Way HIRE Initiative: Employment training initiative. • Urban League of Greater Madison • Centro Hispano • Latino Academy of Workforce Development • YWCA of Dane County • Literacy Network • Worker Justice WI: Training on employee rights and wage theft. • Operation Fresh Start: Mentorship for justice-impacted youth, high school diploma or equivalency obtainment, driver's license obtainment. • Project Respect: Supportive services for survivors of human trafficking. • Edgewood College Marriage and Family Therapy program: Free counseling services provided by graduate students supervised by licensed therapists. • Anesis Center for Therapy: Mental health and substance use disorder therapy. • Vision Beyond Bars: Contracted peer support services within the Dane County Jail and through JustDane's Peer Support Program. <p>Additionally, as an agency funded through the City of Madison Violence Prevention Initiative, JustDane will leverage these partnerships to offer comprehensive support to youth and other residents.</p> <p>4o</p>

CC. **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 checked="" type="checkbox"/>	Annual Operating Support
<input checked="" type="checkbox"/>	Payments out of available cash flow	<input type="checkbox"/>	Other :

In our agreement with JustDane, the developer will provide \$40,000 annually for the salary of the housing advocate, as well as furnishings and space. This funding will enable JustDane to deliver services and programming. The salary will be paid out through the project's cash flow on an annual basis.

DD. 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.

To gauge the effectiveness of JustDane's involvement in the Park Lofts project, it is essential to establish a set of comprehensive performance metrics and methods for measuring success. These metrics will help determine the impact of the services provided and guide continuous improvement efforts.

One key performance indicator is housing stability. The goal is for at least 80% of residents to maintain housing for one year. This can be tracked through regular check-ins and monitoring lease renewals. Employment and income growth among residents is another crucial metric. JustDane aims for at least 50% of residents to gain employment or improve their income within the first year. Surveys, interviews, and income verification will be used to gather this data.

Resident satisfaction is also a priority, with a target satisfaction rate of 85% or higher. This will be measured through regular satisfaction surveys, which will provide insights into the residents' perspectives on the services provided. Additionally, program participation and engagement are important metrics. JustDane seeks to have at least 75% of residents participate in at least one program or service per quarter. Attendance records and program enrollment data will be used to track this participation.

The health and well-being of residents are critical outcomes to measure. The aim is for at least 60% of residents to report improved health and well-being after six months. Health surveys, self-reported assessments, and partnerships with local health providers will provide the necessary data. Education and skills development are also vital, with a target of at least 40% of residents enrolling in educational or vocational training programs. Enrollment records and completion certificates will serve as evidence of progress.

Community integration is another significant aspect of success. JustDane aims to increase community engagement by 30% within the first year, measured through event attendance records and community feedback. To measure these metrics effectively, several methods will be employed.

Regular surveys and interviews with residents will be conducted to gather feedback on services, satisfaction, and areas for improvement. A robust data management system will be implemented to track residents' progress, participation in programs, and other key metrics. Focus groups with residents will provide qualitative data on the impact of services, while partnerships with local health providers, educational institutions, and employment agencies will offer additional data on residents' progress and outcomes.

Detailed case management reports will be used to monitor individual residents' progress and identify any barriers to success. Community feedback will be gathered to assess the impact of the project on neighborhood integration and overall community well-being. Finally, annual performance reviews will be conducted to evaluate the effectiveness of JustDane's services and make necessary adjustments.

By setting clear targets and using a combination of quantitative and qualitative data collection methods, JustDane can effectively measure and demonstrate the success of their involvement in the Park Lofts project. This structured approach will ensure continuous improvement and a positive impact on the residents and the broader community.

EE. 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). If applicable, provide an example of how this partnership has worked to keep a tenant housed in other developments

Lutheran Social Services, the property manager, and JustDane, the supportive service provider, will work closely to create synergy within the development team and ensure the project's success. Together, they will develop a low-barrier, inclusive tenant selection plan for the community. Both organizations will continue to hold regular meetings to align on the project's goals and consistency. Preventative practices will be implemented by both groups to ensure tenant success.

EXPERIENCE AND QUALIFICATIONS

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

Eminent Development and Lutheran Social Services of Upper Michigan and Wisconsin form a unique team with a wealth of experience and skill. LSS, a top non-profit developer in the state, has a portfolio of successful projects throughout the region. As both a developer and property manager, they bring valuable resources that will contribute to the project's success. Eminent Development Corporation is led by Julian Walters, an emerging developer and Madison native, with experience in NMTC and LIHTC developments in both the public and private sectors. His connection to the city and the project will assist in public and community relations. Baker Tilly is the consultant on this project, bringing industry-leading expertise in tax credit services from pre-application to stabilization.

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

Lutheran Social Services will serve as both the co-developer and property manager for this project. They manage over 1,000 units in Wisconsin, including developments in Madison. They are recognized statewide for their expertise in managing supportive service projects alongside standard practices associated with LIHTC projects.

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

PROJECT FINANCING

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

***See 20 yr projections in excel attached**

OPERATING BUDGET

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

Utilities										
Security										
Maintenance Expenses										
Property Taxes										
Insurance										
Reserves for Replacement										
Total Operating Expenses										
Net Operating Income										
Debt Service										
Asset Management										
Cash Flow										

Tenant Selection Plan

DRAFT RESIDENT SELECTION PLAN

Park Lofts
"Development"
Madison, Wisconsin

Park Lofts, LLC
"Owner"

Lutheran Social Services of Wisconsin and Upper Michigan Inc.
"Property Management"

DRAFT: Subject to Investor Approval

I. INTRODUCTION

This Resident Selection Plan (the "Plan") outlines the procedures that will be followed in selecting residents for the Development. Property Management is responsible for implementing these procedures.

A. Apartment Distribution

The Development will offer forty-four (44) apartments. This does not include a management apartment. The income limitations of these apartments are as follows:

0	market rate (no income restriction) apartments
10	apartments at <u>30 %</u> median income
7	apartments at <u>50 %</u> median income
27	apartments at <u>60 %</u> median income
0	manager apartment(s)

If a household occupying an income-restricted apartment experiences a change of income so as to no longer qualify for the apartment, the household may remain in the rental apartment, subject to applicable Low Income Housing Tax Credit ("LIHTC") regulations. In such a case, Property Management must make every effort to rent to residents meeting the income limitations stated above.

B. Rent Structure

The initial rent structure for the development, by apartment size, income level and waiting list, is attached to this Resident Selection Plan (**Exhibit A**).

C. Security Deposits

Upon lease signing, applicants are responsible for paying a security deposit equivalent to 1 months' rent. Units will be eligible to have security deposits paid from the reserve fund.

II. DEFINITIONS

The following definitions apply to this Plan.

A. Homeless. Homeless is defined in accordance with HUD regulations as follows:

1. Literally Homeless. An Individual or family who lacks a fixed, regular, and adequate nighttime residence, meaning:
 - a. Has a primary nighttime residence that is a public or private place not meant for human habitation; or
 - b. Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); or
 - c. Is exiting an institution where (s)he has resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution.

or

2. Imminent Risk of Homelessness. An individual or family who will imminently lose their primary nighttime residence, provided that:

- a. Residence will be lost within 14 days of the date of application for homeless assistance;
- b. No subsequent residence has been identified; and
- c. The individual or family lacks the resources or support networks needed to obtain other permanent housing.

B. Chronically Homeless. Chronically Homeless is defined in accordance with the 2015 HUD Defining Chronically Homeless Final Rule as follows:

1. A homeless individual with a disability as defined in section 401(9) of the McKinney-Vento Assistance Act (42 U.S.C. 11360(9)),
 - a. Lives in a place not meant for human habitation, a safe haven, or in an emergency shelter, and
 - b. Has been homeless and living as described for at least 12 months or on at least 4 separate occasions in the last 3 years, as long as the combined occasions equal at least 12 months and each break in homelessness separating the occasions included at least 7 consecutive nights of not living as described.

or
2. An individual who has been residing in an institutional care facility for less, including jail, substance abuse or mental health treatment facility, hospital, or other similar facility, for fewer than 90 days and met all of the criteria of this definition before entering that facility;

or
3. A family with an adult head of household (or, if there is no adult in the family, a minor head of household) who meets all of the criteria of this definition, including a family whose composition has fluctuated while the head of household has been homeless.

C. Coordinated Entry. Coordinated Entry (“CE”) means the Homeless Services Consortium of Dane County’s system that is designed to assess, match and prioritize people experiencing homelessness to housing. The CE process provides a common, population-specific assessment, centralized data system, and prioritization method. Eligibility criteria for housing varies upon the subsidy funding source and may include meeting a definition of homelessness at the time of referral and placement, enrollment in specific benefits programs, income criteria and/or the ability to live independently within the structure of the housing program. Participants who meet eligibility criteria are prioritized based on various criteria, such as levels of vulnerability, length and history of homelessness, and severity of housing barriers.

D. Permanent Supportive Housing. Permanent Supportive Housing are apartments that have low-barrier resident screening and selection practices that promote accepting applicants regardless of their sobriety or use of substances, completion of treatment, or participation in services, and prohibit rejecting applicants on the basis of poor credit or financial history, poor or lack of rental history, criminal convictions unrelated to tenancy, or behaviors that indicate a lack of housing readiness.

E. Resident Selection. A waiting list establishes the order in which housing offers are made to qualified applicants. The Development will lease units according to the waiting lists or coordinated entry as set from below:

1. **LIHTC Waiting List.** Thirty-three (33) apartments are set aside for the LIHTC list. Property Management will maintain the waiting list for the LIHTC apartments.
2. **At-Risk Waiting List.** Eleven (11) apartments are set aside for At-Risk households (“At-Risk List”). Property Management will maintain the waiting list for the At-Risk apartments. All apartments are supported by Project Based Vouchers (“PBVs”) from the City of Madison Community Development Authority (“CDA”).

F. Service Provider. The Service Provider provides case management services and is the lead agency for service coordination at the Development. Their scope of services is detailed in a separate Supportive Services Plan. Service Provider is Tellurian, Inc.

III. **ELIGIBILITY REQUIREMENTS**

A. **All Apartments**

The following criteria apply to all forty-four (44) apartments, regardless of waiting list.

1. **Income.**

The annual gross income of the applicant must be less than or equal to the income limits established by the applicable program administrative rules for the appropriate household size.

Tenant-Based Rental Assistance (“TBRA”) is accepted for all units not already supported with Project Based Vouchers.

2. **Sole Residence.**

The apartment must be the applicant's sole residence in order for the applicant to be eligible for housing.

3. **Eligibility of Students.**

Households comprised of full-time students, as defined by LIHTC rules, are not eligible for housing at the Development unless they qualify for one of the exceptions as defined by LIHTC rules.

B. **LIHTC List (33 apartments – No PBVs)**

1. In addition to the requirements in Section III.A, applicants for the LIHTC List must meet the following eligibility criteria:
 - a. Has annual income that is less than or equal to 60% of the area median income as determined by HUD for all apartments;
 - b. Has income equal to or greater than twice one month’s rent;
 - c. Credit score of at least 500; and,
 - d. Have the ability and commitment to enter into a lease agreement and supportive services agreement.
2. Property Management will be responsible for determining an applicant’s eligibility under Section III.B.

C. **At-Risk List (11 apartments - 11 CDA PBVs)**

1. In addition to the requirements in Section III.A, applicants for the At-Risk apartments must meet the following eligibility criteria:
 - a. Has annual income that is less than or equal to 50% of the area median income as determine by HUD for all apartments;
 - b. Is “At-Risk” of homelessness in that:
 - a. Has moved because of economic reasons two or more times during the 60 days immediately preceding the application for housing, or
 - b. Otherwise lives in housing that has characteristics associated with instability and an increased risk of homelessness;
 - c. Has some form of income;
 - d. Has not been identified as chronically homeless;
 - e. Is currently receiving services at a Dane County emergency shelter or through outreach providers in Dane County;
 - f. Participate in a social services assessment; and,
 - g. Have the ability and commitment to enter into a lease agreement and supportive services agreement.
 - h. Other conditions of the CDA PBV program.
2. Property Management will be responsible for determining an applicant’s eligibility under Section III.C.

IV. OCCUPANCY STANDARDS

- A. The apartment applied for must have enough space to accommodate the applicant's household. In selecting an apartment size for the applicant, Property Management's occupancy standards must comply with federal, state and local occupancy standards, and/or laws in connection with occupancy requirements, fair housing and civil rights laws, as well as landlord-resident laws and zoning restrictions.
- B. The Occupancy Standards listed below take into consideration family size and apartment sizes that are available:

Apartment Size	Minimum	Maximum
0 bedrooms	1	1

V. LEASE-UP PROCESS

A. LIHTC (33 apartments – No PBVs)

1. **Property Management** will open the LIHTC List prior to the expected date the Development is ready for occupancy.
2. **Property Management** may publicize the opening of the LIHTC List to the general public via newspaper ads and to organizations in Madison which serve individuals seeking housing.
3. **Property Management** will pre-screen individuals interested in the LIHTC apartments to determine income and household size eligibility. Individuals satisfying the requirements will be placed on the LIHTC List in the order in which the pre-screening was completed.
4. Once the property is ready to take full applications, **Property Management** will contact individuals in the order in which pre-screening was completed (i.e. first come, first serve) to invite them to submit an application.
5. Once an application is received, **Property Management** will run an income verification and criminal background check.
6. **Property Management** will schedule and complete an in-person interview with the applicant.
7. **Property Management** will send application documentation to their compliance department for further screening.
8. **Property Management's** compliance department will inform the onsite property management staff of the results of the screening.
9. **Property Management** will determine if the application is approved.
 - a. If approved, Property Management will notify the applicant and schedule a date to review and complete the leasing documents.
 - b. If not approved, Property Management will inform the applicant about the reasons for denial and the appeal process.
10. **Property Management** and the applicant will sign the lease and agree to a move-in date.
11. **Applicant** will need make payments to property management before or on day of move-in of first months' rent and the security deposit, on separate checks.
12. **Day of Move-In**
 - a. **Property Management** will coordinate the move-in process by providing the applicant with their keys and other essentials for their apartment.
 - b. If not previously completed, **Property Management** will complete a move-in inspection checklist with the Resident at this time.

B. At Risk (11 apartments - 11 CDA PBVs)

1. **Property Management** will open the At-Risk List prior to the expected date the Development is ready for occupancy.
2. **Property Management** may publicize the opening of the At-Risk list to the general public through ads, social media posts, and outreach to organizations in Madison that assist individuals seeking housing. Property Management will inform CDA of the upcoming vacancy(ies).
3. **Property Management** will pre-screen individuals interested in the At-Risk apartments to determine income, household size and likelihood of PBV eligibility. Individuals satisfying the requirements will be placed on the At-Risk Waiting List.
4. Once the property is ready to take full applications, **Property Management** will contact individuals in the order in which pre-screening was completed (i.e., first come, first serve) to invite them to submit an application.
5. Once an application is received, **Property Management** will run an income verification and criminal background check.
6. **Property Management** will schedule an in-person interview and preliminary services screening with the applicant, and the applicant's support team if applicable. **Property Management** will conduct an interview. Separately, **Service Provider** will conduct a preliminary service screening. Service Provider will also determine if applicant is enrolled in Medicaid, and if not proceed with initiating Medicaid enrollment if applicant is eligible.
7. Based on the preliminary screening, **Service Provider** will conduct a preliminary assessment (**Exhibit B**) to determine if applicant can live independently. If applicant is determined to be able to live independently, Service Provider will inform Property Management about the information gathered and the support they need to be successful at the apartment. If applicant is determined to not be able to live independently, Service Provider will inform Property Management of the information gathered and what aspects the applicant does not seem to be befitting for the apartment with specific details.
8. **Property Management** will send application documentation to their compliance department for screening.
9. **Property Management's** compliance department will inform the onsite property management staff of the results of the screening.
10. **Property Management**, based on the Service Provider's preliminary screening and the property management screening, will determine if the application is conditionally approved.
 - a. If conditionally approved, Property Management will notify the applicant of next steps in the leasing process.
 - b. If not approved, Property Management will inform the applicant about the reasons for denial and the appeal process.
11. **CDA Process**
 - a. **If conditionally approved, Property Management** will deliver the application and documentation for a request for tenancy to CDA.
 - b. **CDA** will reach out to applicant and Property Management with their own screening process.
 - c. Upon CDA screening approval, **Property Management** will schedule a Housing Quality Standards (HQS) Inspection with CDA.
 - d. Upon the CDA inspection approval, **CDA** inform Property Management and set a tentative date for applicant to move in.
12. **Property Management** will communicate with the applicant and Service Provided when the inspection is approved. They will schedule a meeting with

the applicant to review and complete the leasing documents.

13. **Property Management** and the applicant will sign the lease and agree to a move-in date.
14. **Applicant** will need make payments to property management before or on day of move-in of first months' rent and the security deposit, on separate checks.
15. **Day of Move-In**
 - a. **Property Management** will coordinate the move-in process by providing the applicant with their keys and other essentials for their apartment.
 - b. If not previously completed, **Property Management** will complete a move-in inspection checklist with the applicant at this time.
 - c. **Service Provider** will complete admission to supportive services and complete the service assessment to evaluate supportive services needed.
16. **CDA Process**
 - a. **If conditionally approved, Property Management** will deliver the application and documentation for a request for tenancy to CDA, depending on the apartment.
 - b. **CDA** will reach out to applicant and Property Management with their own screening process.
 - c. Upon CDA screening approval, **Property Management** will schedule a Housing Quality Standards (HQS) Inspection with CDA.
 - d. Upon the inspection approval, **CDA** will inform Property Management and set a tentative date for applicant to move in.
17. **Property Management** will communicate with the applicant and Service Provider when the inspection is approved. They will schedule a meeting with the applicant to complete the leasing documents.
18. **Property Management** will meet with applicant and their support team to review and complete all leasing documents.
19. **Applicant** will need make payments to property management before or on day of move-in of first months' rent and the security deposit, on separate checks.
20. **Day of Move-In**
 - a. **Property Management** will coordinate the move-in process by providing the applicant with their keys and other essentials for their apartment.
 - b. If not previously completed, **Property Management** will complete a move-in inspection checklist with the applicant at this time.
 - c. **Service Provider** will complete admission to supportive services and complete the service assessment to evaluate supportive services needed.

VI. APPLICATION PROCESS

A. Application Requirements

A complete application includes the following information:

1. A written application submitted by the applicant household.
2. A credit report ordered by Property Management.
 - a. A fee for credit and criminal records searches may be charged; however, applicants who are current residents of Wisconsin will not be charged a fee for a criminal records search.
3. Verification of income, bank accounts and other assets, etc., as applicable for each applicant household.
4. Social security numbers for all members of the household, or a certification if a person has not been assigned a social security number.
5. Birth certificate, passport or other proof of citizenship status. Only applicants who are US citizens or eligible non-citizens may benefit from federally assisted apartments.

B. Incomplete Applications

All incomplete applications will be returned with directions regarding the areas that need to be completed before the application can be processed. Property Management and Service Provider will work with applicants referred the CE list (Permanent Supportive Housing and Other Supportive Housing) to complete their applications.

C. Completion of Application Process

All applications will be processed within thirty days after the date of the applicant's initial interview or within five business days of receipt of all required documentation, whichever is later (excluding weekends and designated Federal holidays).

VII. WAITING LIST PROCEDURES (LIHTC & At Risk Apartments ONLY)

A. Receiving Applications

1. Requests for applications can be made in person, by phone, or in writing.
2. Completed applications will be accepted at the Property Management's office in the Apartment community, by mail or by email. Received applications will be date and time stamped when received. To be complete, applications must satisfy the requirements set forth in Section VI A.
3. Applications will be processed in the order in which they are received and without regard to race, color, creed, religion, sex, national origin, familial status, or handicap.
4. Incomplete applications will be returned to the applicant with directions as to the areas that need to be completed before the application can be processed.
5. Applications will be reviewed to determine whether they are eligible for LIHTC apartments in accordance with the criteria in Section III B. If the applicant is deemed preliminarily eligible, they will be processed according to the procedures for an available LIHTC apartment or if no LIHTC apartment is available placed on the LIHTC Waiting List. Those not eligible for an LIHTC apartment will be reviewed to determine whether they are eligible for an At Risk apartment in accordance with the criteria in Section III C. If the applicant is deemed preliminarily eligible, they will be processed according to the procedures for an available At-Risk apartment or if no At-Risk apartment is available placed on the At-Risk Waiting List.
6. If an applicant is deemed Ineligible for either a LIHTC or an At-Risk apartment, they will be notified as provided by Section X.

B. Contacting Persons on a Waiting List

1. **Property Management will contact applicants as follows:**
 - a. When apartment becomes available, the first five (5) applicants on the waiting list or that apartment type (LIHTC or At-Risk) will be contacted via phone and in writing for the purpose of notifying them of an available unit and their position on the waiting list.
 - b. Each applicant will have seven (7) business days to respond to this contact, view the apartment if they so choose, and accept an offer of residency.
 - c. Each applicant that accepts an offer of residency will be offered the apartment in the order that they appeared on the waiting list. The lease-up process for the particular apartment (LIHTC or At-Risk) described previously will be followed.
 - d. When the apartment is filled each applicant that was not offered a unit will be placed back on the waiting list in their original order.
 - e. If no response is received from the first five (5) applicants on the waiting list within the seven (7) day timeframe, then the next five applicants on the waiting list will be processed according to the procedures listed above.
 - f. If Property Management does not receive a response to the letter within seven (7) business days from the date of the letter, the applicant will forfeit the opportunity to apply for the available apartment but will remain at the top of the applicable waiting list.

- g. If an applicant responds after seven (7) business days, they will forfeit any rights to be offered the unit in the order that they appeared on the waiting list; however, they will not lose their place on the waiting list for future apartment offers.
- h. If an applicant does not respond, when a second apartment of the type for which the applicant was eligible becomes available, Property Management will send another letter to the applicant informing them. If the applicant does not respond within the period specified, the applicant's application will be placed in the inactive file.

2. Applicant Refusal of Apartment

- a. For LIHTC and At Risk apartments, if the applicant refuses an apartment, he/she will remain at the top of the applicable Waiting List. However, a letter will be sent informing him/her that after the second refusal, his/her name will be removed from the applicable Waiting List and placed in the inactive file.

3. Missed Interview

- a. When an interview is scheduled but the applicant fails to attend, an attempt will be made to contact the applicant by telephone.
- b. If there is no contact after three attempts within 48 hours, the applicant's application will be placed in the inactive file.
- c. If the applicant is contacted, and the applicant had good cause, such as illness or accident, for failure to keep the original appointment, another appointment will be scheduled.
- d. If the applicant again fails to attend the interview, the applicant's application will be placed in the inactive file.

C. Closing/Reopening the Waiting List

- 1. **Closing the Waiting List.** In the event that the same (5) applicants on the application waiting list for either LIHTC or At-Risk apartments (pulled for a vacant apartment) equal or exceed three (3) years, the waiting list will be closed. Upon closing the waiting list, notification will be published in the local paper that applications are no longer being accepted due to the high number of applicants currently waiting. While the waiting list is closed, Property Management will deny all applications.
- 2. **Reopening the Waiting List.** When the estimated waiting time is reduced to one (1) year or less, Property Management will re-open the waiting list. Upon opening the waiting list, notification will be published in the local paper advising the public that we are once again accepting applications and advising of when and where to apply.

VIII. SELECTION AND REJECTION CRITERIA

Meeting the eligibility requirements under Section VI does not mean that an applicant will be a suitable resident. All apartments must also meet the following selection and rejection criteria. Applicants determined to be suitable for tenancy must also pass CDA or DCHA Section 8 screening and eligibility criteria, depending on the waiting list, in order to be offered a PBV apartment. The ability of the applicant to fulfill lease obligations, along with any related explanations offered by the applicant concerning the facts involved, including any changes in circumstances, will be considered. An applicant may be rejected for one or more of the following reasons:

A. Insufficient/Inaccurate Information on Application

Refusing to cooperate fully in all aspects of the application process or supplying false information will be grounds for rejection.

B. Credit and Financial Standing

- 1. Unsatisfactory history of meeting financial obligations (including, but not limited to timely payment of rent, outstanding judgments or a history of late payment of bills) will be considered. If the credit score is a contributing factor to

a denial, Property Management will provide the applicant with the reason for rejection and notify them that they may request a copy of the credit report that was ordered at no cost, within 60 days of the notice of denial. Applicants will also be given two weeks to dispute any information on the credit report.

2. The inability to verify credit references may result in rejection of an applicant. Special circumstances will be considered in which credit has not been established (income, age, marital status, etc.) and lack of credit history will not cause an applicant to be rejected. In such circumstances, Property Management may require that a person with a history of creditworthiness guarantee the lease.
3. The applicant's financial inability to pay their monthly contribution toward the rent of the apartment will be assessed. Ordinarily, the total of the applicant's monthly contribution plus other long-term obligations (payments extending more than twelve months) should be less than 45% of their monthly gross income. Income ratios will be considered in the context of the applicant's credit and employment history and potential for increases in income. The applicant's ability to pay the rental amount can be presented in any reasonable method, including: (a) letter(s) from prior landlords and (b) proof of payment.
4. Notwithstanding the prior criteria, Property Management will not deny an applicant:
 - a. based on source of income, which includes housing choice vouchers (HCV), rental assistance or any other form of tenant-based rental assistance (TBRA), whether temporary or permanent;
 - b. based on credit score alone;
 - c. who has a cosigner, and/or is enrolled in or has documentation of completing a credit repair program, and/or is enrolled in housing program providing supportive services;
 - d. based on information on the credit report that has been formally disputed, is in repayment, or is substantially unrelated to prior housing obligations;
 - e. who owes money to a prior landlord for rent or damages, or to a utility company, if the applicant has entered into a payment arrangement with the creditor and is current on the repayment arrangement;
 - f. based on any eviction filing that was dismissed or resulted in a judgement in favor of the applicant;
 - g. based on any eviction filing that was settled with no judgement or writ of recovery issued (e.g., stipulated dismissal); or,
 - h. based on any eviction filing that resulted in judgement for the landlord more than two years before the applicant submits the application.

C. Criminal Convictions and Current Drug Use

1. Property Management will conduct a criminal background check on all applicants and screen based on the criteria outlined below and further detailed the Criminal Screening Criteria chart attached as **Exhibit C**. In the event there is any inconsistency, the criteria below will override Exhibit C.
2. Applicants who fall into the following categories **may** be rejected.
 - a. Criminal convictions that involved physical violence to persons or property, or endangered the health and safety of other persons;
 - b. Criminal convictions in connection with the manufacture or distribution of a controlled substance; or
 - c. Current addiction to or engagement in the illegal use of a controlled substance.
 - d. If an applicant is currently receiving treatment for addiction to a controlled substance, the applicant will not be rejected so long as he/she is acceptable as a resident in all other respects.
 - e. All circumstances regarding criminal convictions, including the period during which the convictions occurred, will be considered.
 - f. Property Management determines that an applicant's use or pattern of illegal use of a controlled substance or such person's use or pattern of

abuse of alcohol may interfere with the health, safety, or right to peaceful enjoyment of the premises by other residents or Property Management. (For the purpose of this Plan, “pattern” shall mean more than one incident.)

2. Applicants who fall into the following categories **will** be rejected.
 - a. Any member of the household is subject to a lifetime registration requirement or is currently registered under a state sex offender registration program. During the admissions screening process, the Owner must perform the necessary criminal history background checks in the state where the housing is located and in other states where the household members are known to have resided.
 - b. Any member of the applicant’s household has been convicted of the manufacture of methamphetamine on the premises of federally subsidized housing at any point in their lifetime.
 - c. Any member of applicant’s household has been evicted from federally assisted housing for drug-related criminal activity for three (3) years from the date of eviction.
3. Applicants who fall into the following categories will be considered through a special exception process, delineated below in this section:
 - a. Any household member is currently engaging in illegal drug use.
 - b. The Owner determines that there is reasonable cause to believe that a household member’s illegal use (or a pattern of illegal use) of a drug or abuse (or pattern of abuse) of alcohol may interfere with the health, safety, or right to peaceful enjoyment of the premises by other residents. (Screening standards must be based on behavior, not the condition of alcoholism.)
 - c. Violent criminal activity which indicates a pattern of violence that may threaten the safety of residents or staff.
 - d. Any criminal activity that would threaten the health, safety, or right to peaceful enjoyment of the premises by other residents, the owner or any employee who is involved in the housing operations.
 - e. Unlawfully obtaining government assistance.
4. Property Management and Service Provider will collaboratively assess an applicant with criminal activity from Section VIII.C using the following special process.
 - a. Service Provider will conduct a clinical, psycho-social assessment (intake assessment) before approving the person for residency (as opposed to the standard procedure of waiting until after approval to do an assessment);
 - b. Using that clinical assessment, Property Management, Service Provider and the Owner will meet to determine:
 - i. Whether the person is likely and able to engage actively with supportive services;
 - ii. Whether the services partner is able to offer the services necessary to support the success of the person in their:
 - ability to live independently (without medical or behavioral supervision)
 - housing stability/ability to uphold the conditions of the lease;
 - ability to be successful both in the internal building community (a good neighbor, non-threatening to other residents and staff) and external community in the neighborhood;
 - iii. Supportive services staff submits a written, time certain/dated plan for supporting the resident in all of the above areas.
 - c. If the entire team agrees that the person is a good fit for the building, Property Management will override the criminal background restrictions established in the Plan.
5. Notwithstanding the prior criteria, Property Management may **not** deny an applicant based on:

- a. an arrest that has not resulted in a conviction;
- b. participation in diversion or deferral of judgement programs, including stays of adjudication and continuances for dismissal without prosecution;
- c. a conviction for a crime that is no longer illegal in the State of Wisconsin or the City of Madison, regardless of time elapsed from date of conviction;
- d. a conviction which has been vacated or expunged, or for which the applicant received a stay of imposition and sentencing and complied with the terms of the stay;
- e. a conviction, determination, or adjudication in the juvenile justice system;
- f. any misdemeanor offense, unless the offense has a substantial relation to tenancy, and the date of conviction is greater than two (2) years of the date of application; or
- g. any offense for which the date of conviction is more than ten (10) years from the date of application, except for the applicants who must be declined based mandatory criteria listed in Section XI.C.3.

D. Extenuating Circumstances

The development has adopted the following policy regarding extenuating circumstances:

- 1. Extenuating circumstances will be considered in circumstances when applicants would normally be rejected. The applicant will have to provide in writing (from a third-party social service agency) the circumstances in which they will be an acceptable resident in the future.
- 2. If the applicant is a person with disabilities, Management must consider extenuating circumstances where this would be required as a matter of reasonable accommodation.

IX. REJECTION PROCEDURES & APPEAL PROCESS

A. Written Notification

Written notice of denial will be provided, unless waived by the applicant in writing, and will include an explanation of the Resident Selection Plan criteria that applicant failed to satisfy. Each rejected applicant will be promptly notified in writing of the reason(s) for rejection (**Exhibit D**). This notice will advise the applicant that they may, within fourteen (14) days of receipt of the notice (excluding weekends and designated Federal holidays), appeal the denial, how to seek and file an appeal, including what documentation could correct the basis for denial (e.g. stating the reasons for denial and providing a list of potentially acceptable documentation) and timeline for processing. Appeals and supporting documentation will be accepted in any reasonable format (e.g., electronic, handwritten, etc.)

B. Review of Rejected Applications

The applicant will have fourteen (14) days (excluding weekends and designated Federal holidays) to respond in writing or request a meeting to discuss the rejection. Any meeting with the applicant or review of the applicant's written response will be conducted by a member of Property Management's staff and Service Provider staff who did not participate in the application process or in the decision to reject the applicant. However, the final decision will lie with the Property Management staff.

If the applicant appeals the rejection, the applicant will be given a final written decision from Property Management within five (5) days (excluding weekends and designated Federal holidays) of the written response or meeting. If the decision is reversed, the applicant will be offered a suitable At-Risk apartment or referred to the CDA or DCHA screening as required for a Section 8 PBV apartment. If no such apartment is available, the applicant will be offered the next appropriate apartment.

X. VAWA PROTECTIONS

- A. Property Management may not consider incidents of domestic violence, dating violence or stalking as serious or repeated violations of the lease or other “good cause” for

termination of assistance, tenancy or occupancy rights of the victim of abuse.

- B. Property Management may not consider criminal activity directly relating to abuse, engaged in by a member of a resident's household or any guest or other person under the resident's control, cause for termination of assistance, tenancy, or occupancy rights if the resident or an immediate member of the resident's family is the victim or threatened victim of that abuse.
- C. Property Management may not consider poor credit history resulting from the perpetrator using the victim's name to open accounts, loans, utilities, etc., or failing in the ability to pay medical bills resulting from the abuse or forcing the victim to work without pay, as cause for termination of assistance, tenancy or occupancy rights.
- D. Property Management may request in writing that the victim, or a family member on the victim's behalf, certify that the individual is a victim of abuse and that the Certification of Domestic Violence, Dating Violence or Stalking, Form HUD-91066, or other documentation as noted on the certification form, be completed and submitted within 14 business days, or an agreed upon extension date, to receive protection under the VAWA. Failure to provide the certification or other supporting documentation may result in denial of housing.
- E. VAWA protections cover persons of all gender identities and sexual orientations, whether actual or perceived.

XI. SPECIAL OCCUPANCY CATEGORIES

Applicants will be interviewed and processed as outlined above, with exceptions made as follows:

A. Persons with Disabilities

1. An applicant with disabilities will be given priority for an accessible apartment if such applicant deems that this type of apartment is appropriate for their household.
2. Unless an applicant requests placement in an accessible apartment, Property Management will not inquire whether a member of the applicant's household has a disability, or the nature or severity of any disability.
3. Should an applicant deem that an accessible apartment is appropriate for the applicant's household, Property Management may inquire as to whether an applicant's household is qualified for the accessible apartment.
4. If the household deems that the accessible apartment is not appropriate for the household's needs, the household's name will be returned to its place on the Development's Waiting List(s), as applicable.

XII. AMENDING THE RESIDENT SELECTION PLAN

This Plan may be amended only with the prior written approval of the owner/agent.

XIII. AVAILABILITY OF THE RESIDENT SELECTION PLAN

This Plan will be made available to applicants before they apply and pay an application fee.

XIV. CERTIFICATION

By signing this Resident Selection Plan, Property Management certifies that the contents of this plan will be followed as written, and that no other Resident Selection Plan has been executed for the development at this time, nor will be executed in the future without written approval from the Owner.

PROPERTY MANAGEMENT

Lutheran Social Services of Wisconsin and Upper Michigan Inc.

Name:
Its:

Date

Property Management

August 5, 2024

Eminent Development Corporation
ATTN: Julian Walters, President
3910 Dallas Dr
Madison, WI, 53719

Dear Julian,

Lutheran Social Services is pleased to confirm our intent to serve as the designated property management partner for the proposed development project, Park Lofts.

We acknowledge our understanding of the lease addendum items that Eminent Development Corporation has agreed to in their application, and we are committed to implementing these terms in our property management practices. Specifically, we understand and agree to the following items:

A. Security Deposits

The amount of a security deposit shall not be more than one month's rent.

B. Late Fees and Other Fees

Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent. Other penalty fees are prohibited. All other fees must be directly related to the cost for a specific amenity or service provided to the tenant and comply with all applicable laws.

C. Rights of Youth to Access Common Spaces

Youth under the age of 18 are allowed to use and enjoy common areas without supervision. This does not preclude reasonable rules to ensure the safety of children and youth.

D. Good Cause for Termination

A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined 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.

E. 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 the 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 to the ban, and address any unintended consequences of the proposed ban.
3. 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 the 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.

F. 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.

We are dedicated to maintaining the highest standards of property management and ensuring that these lease addendum items are fully integrated into our operations. Our team is experienced in managing affordable housing developments and is committed to fostering a thriving and inclusive community.

We look forward to working closely with Eminent Development Corporation to achieve the successful implementation of this project. Should you require any further information or clarification, please do not hesitate to contact us.

Sincerely,


Dennis Hanson
Vice President

August 5, 2024

Eminent Development Corporation
ATTN: Julian Walters, President
3910 Dallas Drive
Madison, WI, 53719

Dear Julian,

Lutheran Social Services is pleased to confirm our intent to serve as the designated property management partner for the proposed development project, Park Lofts.

We acknowledge our understanding of the tenancy selection criteria outlined in the project application and are committed to implementing these criteria in our property management practices. We are dedicated to maintaining the highest standards of property management and ensuring that the tenancy selection process aligns with the goals and requirements of the project. Our team is experienced in managing affordable housing developments and is committed to fostering a thriving and inclusive community.

We look forward to working closely with Eminent Development Corporation to achieve the successful implementation of this project. Should you require any further information or clarification, please do not hesitate to contact us.

Sincerely,



Dennis Hanson
Vice President



Supportive Service Provider



August 5, 2024

Julian Walters
President
Eminent Development Corporation
3910 Dallas Dr.
Madison, WI 53719

Dear Julian Walters,

We, JustDane Inc., are pleased to confirm our role as a designated supportive services partner for the proposed development project, Park Lofts.

We are committed to the goals outlined in your application, particularly the commitment to ending homelessness through comprehensive supportive services. Our organization has extensive experience in providing services tailored to the needs of Youth who have aged out of Foster Care experiencing homelessness.

We understand the critical importance of these services in achieving the project's goals and are committed to working collaboratively with Eminent Development Corporation to ensure their successful implementation. Our team is dedicated to providing ongoing support and resources to help residents achieve long-term stability and independence.

We look forward to contributing to this meaningful initiative and making a significant impact in the lives of those experiencing homelessness. Should you require any further information or clarification, please do not hesitate to contact us.

Sincerely,

Shar-Ron E. Buie Associate
Director JustDane Inc.
128 E Olin Avenue
Madison, WI 53713
Shar-ron@justdane.org
608-256-0906

128 E. Olin Ave., Suite 202, Madison, WI 53713 | 608-256-0906 | justdane.org

"A community where everyone has a chance to succeed"



August 5, 2024

Julian Walters
President
Eminent Development Corporation
3910 Dallas Dr.
Madison, WI 53719

Dear Julian Walters,

We, JustDane, are pleased to confirm our role as a designated supportive services partner for the proposed development project, Park Lofts.

We fully support the comprehensive supportive services plan outlined in your application and are committed to providing the necessary services to ensure the success of this initiative.

We are dedicated to maintaining the highest standards in delivering these supportive services and ensuring that residents have access to the resources they need to thrive. Our team is experienced in managing similar programs and is committed to making a positive impact on the lives of those we serve.

We look forward to working closely with Eminent Development Corporation to achieve the successful implementation of this supportive services plan. Should you require any further information or clarification, please do not hesitate to contact us.

Sincerely,

Shar-Ron E. Buie Associate
Director JustDane Inc.
128 E Olin Avenue
Madison, WI 53713
Shar-ron@justdane.org
608-256-0906

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Population Served

Services will be offered to residents ages 18-25 transitioning out of foster care at Park Lofts. Information will be provided to residents upon move in and introductions to the “Empower Youth Transition Program” will be made. This program seeks to provide comprehensive support to youth leaving the foster care system, empowering them with the necessary skills and resources for a successful transition into independent living.

The programming will be provided by Just Dane. The responsibilities associated with the coordination of services are to be part-time.

Supportive Services – “Empower Youth Transition Program”

Eminent Development Corporation is partnering with Just Dane to provide the “Empower Youth Transition Program” to the targeted residents at Park Lofts. Tenants will have access to the help they need through a Just Dane Case Manager 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 Case Manager will be responsible for developing an Individualized Service Plan for each youth based on the assessment, outlining short-term and long-term goals. Collaborate with the youth to identify their aspirations, challenges, and preferences. Integrate life skills training into the individual service plan, covering essential skills such as communication, time management, and problem-solving. Case management will develop a crisis intervention plan to address emergencies or unexpected challenges. Regularly review and update individualized service plans based on the progress and changing needs of youth. Gather feedback from youth and other involved professionals to ensure the effectiveness of the plan.

Just Dane will be on-site 20 hours per week and will work with youth to Establish a regular and predictable schedule for check-ins, ensuring consistent communication between the youth and their support team. Determine the frequency of check-ins based on the specific needs and preferences of the youth. Collaboratively set short-term and long-term goals with the youth during check-ins, and regularly track and review progress toward established goals, adjusting as needed. Include health and wellness assessments during check-ins, addressing both physical and mental health needs. Case management will develop, and review crisis intervention plans during check-ins, ensuring that the youth is equipped with strategies to handle emergencies or unexpected challenges.

A Just Bakery instructor will also host three ServSafe certification classes annually for residents to assist in obtaining nationally recognized certification in the food service industry. Facilitate Just Bakery participants in transitioning to secondary education opportunities.

In depth case management services may include:

Core Services

Employment Training:

1. **Vocational Training Workshops:** Collaborate with local vocational schools to connect youth with specialized training in high-demand industries. Refer interested youth to the Just Dane Just Bakery initiative to train students in commercial baking skills and assist in the transition to vocational training facilities. Offer SERV Safe certification classes on site to at least three cohorts annually. Coordinate

with community vocational training partners to refer clients. Connect youth to other training programs to enhance job seekers' skills or acquire new skills that are in demand in the job market.

- 2. Job Placement Assistance:** Connect youth with potential employers through job fairs, networking events, and partnerships with local businesses. Conduct workshops to teach job seekers effective job search strategies, including online job portals, networking, and using social media. Partner with community training programs to enhance job seekers' skills and use industry connections to marry skills with targeted needs. Seek internship opportunities for clients with business partners. Utilize influence with job placements services and agencies that specialize and focus on connecting individuals with jobs. Work with clients to increase their online presence to connect with potential employers. Provide job retention strategies such as mentorship, training programs, and peer support to encourage continued employment.
- 3. Resume Building and Interview Skills:** Provide workshops to enhance resume writing and interview skills. Connect with community partners to provide workshops that directly impact crafting a targeted resume.

Soft Skills Development:

- 1. Communication Skills Training:** Conduct workshops focusing on effective communication, conflict resolution, and teamwork. Coordinate with community partners to develop active listening workshops, public speaking training, body language awareness, and technology assisted training.
- 2. Time Management and Goal Setting:** Provide guidance on setting and achieving personal and professional goals. Work with clients to develop prioritization techniques. Provide guidance on setting realistic time limits and goal-oriented planning.
- 3. Financial Literacy Workshops:** Educate youth on budgeting, banking, and financial planning. Connect with educational partners to develop real life scenarios that may affect credit. Conduct workshops and seminars on financial literacy, inviting experts to share insights and practical tips with participants. Provide interactive tools and calculators that help individuals understand concepts like compound interest, budget planning, and investment returns. Engage participants in practical budgeting exercises to help them create and manage a budget tailored to their income and expenses. Offer strategies for managing and reducing debt, including understanding interest rates, debt consolidation, and repayment plans. Educate individuals on the importance of maintaining a good credit score and how it impacts various aspects of their financial life.

Housing Support:

- 1. Independent Living Skills Training:** Conduct workshops on managing household responsibilities, such as cooking, cleaning, and basic home maintenance. Utilize a comprehensive curriculum that addresses housing-related topics. Include modules on searching for housing, budgeting for rent and utilities, understanding leases, home maintenance, and building positive relationships with landlords. Familiarize participants with local community resources that provide housing assistance, financial support, and other essential services. Establish and utilize connections with local housing organizations and nonprofits.

- 2. Tenant Education:** Provide guidance on navigating the rental process, understanding leases, and tenants' rights and responsibilities. Build strong partnerships with child welfare agencies, foster care organizations, housing authorities, local government, and nonprofits specializing in housing support. Engage with professionals in social work, housing, and counseling. Integrate financial literacy components into the curriculum, emphasizing budgeting skills, understanding rental costs, and managing finances related to housing. Familiarize participants with local community resources that provide housing assistance, financial support, and other essential services. Establish and utilize connections with local housing organizations and nonprofits.

Wrap-Around Services:

- 1. Mental Health Support:** Referral and linkage to counseling services for emotional well-being and coping with transition-related stress. Connect youth with mental health supports that are culturally competent and sensitive to the diverse backgrounds and experiences of youth in foster care. Case management and peer support must be aware of cultural nuances. In collaboration with the mental health provider, develop individualized mental health plans for each youth, considering their unique needs, strengths, and challenges. Collaborate with mental health professionals to create tailored support plans. Facilitate and utilize peer support groups where clients can share their experiences and receive support from others who have faced similar challenges. Peer support can reduce isolation and foster a sense of community. Use trauma-informed care practices. Just Dane staff and partners will recognize and respond to the effects of trauma on mental health.
- 2. Healthcare Navigation:** Assistance in accessing healthcare resources and finding affordable healthcare options. Conduct a thorough needs assessment for each youth transitioning out of foster care to identify their unique healthcare requirements. Use case management to provide personalized support and guidance for youth. Assist youth in enrolling or re-enrolling in appropriate health insurance plans. Facilitate the seamless transfer of medical records from previous healthcare providers to ensure continuity of care. Recognize the importance of mental health and ensure referral to counseling or therapy services through connection with community partners and service providers. Integrate life skills training to empower youth with practical skills such as scheduling appointments, medication management, and navigating healthcare facilities independently.
- 3. Legal Aid Clinics:** Case management will conduct an assessment of the legal needs of each youth transitioning out of foster care. Case management staff will collaborate with legal professionals, social workers, and the youth themselves to identify areas requiring legal assistance. Connect youth with legal aid clinics specifically designed to address the legal needs of youth leaving foster care. Refer youth to clinics staffed with experienced attorneys, paralegals, and support staff sensitive to the unique challenges faced by this population. Collaborate with legal professionals to offer pro bono services or secure funding for legal representation. Continue to forge partnerships with existing legal aid organizations to expand the range of legal services available to youth, while leveraging existing resources to ensure a comprehensive and coordinated approach to legal support. Regularly assess the impact and effectiveness of legal aid services through feedback from youth, legal professionals, and

4. **community partners.** Adjust the plan as needed to address emerging legal challenges and ensure continuous improvement.

Additional Supportive Services

Education Support:

1. **Educational Counseling:** Connect youth to an educational counseling team comprised of counselors, academic advisors, and career guidance specialists. Offer youth the opportunity to participate in Just Dane initiatives regarding educational aspirations. Assist youth through counseling and partner collaboration in the enrollment process for educational institutions, including high schools, vocational programs, community colleges, and universities. Provide guidance on choosing appropriate educational paths based on individual strengths and interests. Connect youth to workshops on career exploration to help youth identify potential career paths aligned with their interests and skills. Provide information on various professions, vocational training, and educational pathways through collaboration with the Wisconsin Department of Workforce and Development. Integrate life skills training into the educational counseling program to equip youth with practical skills such as time management, communication, and problem-solving.
2. **Tutoring Services:** Connect youth to a structured tutoring program designed to cater to the individual learning needs of youth. In collaboration with the tutoring program, assist in developing individualized learning plans for each youth based on their academic assessment. Work with youth to help them set measurable goals and milestones to track progress and celebrate achievements. Collaborate with local libraries and educational institutions to expand resource availability. Ensure the integration of study skills development, time management, note-taking, and test preparation into tutoring sessions to equip youth with effective learning strategies. Work with interested youth and volunteers to establish peer tutoring programs where youth can support each other academically and build community and collaboration.

Community Engagement:

1. **Mentorship Programs:** Work to engage community partners and neighborhood associations with diverse backgrounds who are committed to supporting youth leaving foster care to provide support and mentorship for youth. Organize group activities, workshops, and outings to foster a sense of community among youth.
2. **Recreational Activities:** Connect youth with a diverse range of recreational programs that cater to various interests, including sports, arts and crafts, outdoor activities, and cultural experiences. This may include events planned by JustDane staff or by other community partners. Continue to establish and develop partnerships with local community organizations, sports clubs, cultural institutions, and recreational facilities to expand the range of available activities. Plan activities based on the preferences and feedback of the youth involved. Integrate therapeutic recreation options for youth who may benefit from activities promoting mental health and stress relief. Establish youth leadership programs within recreational activities, allowing participants to take on leadership roles and contribute to the planning and execution of events.

Data Collection

Outcome Measurement: Define key performance indicators aligned with the goals of supporting youth in education, housing, employment, health, and overall well-being. Implement an integrated case management system that allows for efficient data collection, storage, and analysis. Utilize the Just Dane database to track outcomes and ensure that the system facilitates collaboration among case management, youth, and other professionals involved in the support network.

Feedback Mechanism: Develop a comprehensive feedback mechanism that allows youth leaving foster care to provide input on their experiences with wraparound services. Include multiple channels such as surveys, focus group discussions, suggestion boxes, and one-on-one feedback sessions. Ensure that feedback channels are easily accessible and confidential to encourage honest and open communication. Implement a schedule for regular feedback collection, integrating it into different phases of service provision. Case management will schedule timing feedback requests to coincide with key milestones in the individualized service plans. Case management will solicit feedback specifically on the case management process, including the responsiveness of Just Dane, the effectiveness of communication, and overall satisfaction with support received.

Community Partnerships

Local Businesses and Employers:

1. **Job Placement Opportunities:** Connect youth with vocational counselors and employment specialists to inform individualized service plans. Conduct a vocational assessment for each youth to identify their skills, interests, and career aspirations. Work with community partners to develop tailored job placement strategies within individualized service plans based on vocational assessment.
2. **Internship Programs:** Contact community partners to facilitate opportunities for internships and apprenticeships to provide hands-on experience in various fields. Identify and secure internship opportunities in various industries aligned with the interests and skills of youth. Connect youth with community partners to provide skill development workshops to prepare youth for their internships. Case management will facilitate ongoing career counseling to support youth in navigating their internship experiences and planning for future career paths.

Educational Institutions:

1. **Partnerships with Schools and Colleges:** Collaborate with educational institutions to offer educational support and access to resources. Conduct a preliminary assessment of the educational needs of each youth leaving foster care, considering academic strengths, challenges, and aspirations. Utilize the Just Dane Just Bakery initiative to provide training opportunities for youth interested in commercial baking or culinary. Connect with educational partners to determine the best fit for youth who seek to continue educational pursuits. Integrate career counseling into educational service plans, helping youth explore potential career paths aligned with their interests and skills. Recognize and support diverse educational pathways, including traditional schooling, online courses, and alternative education programs.

Nonprofit Organizations:

1. **Collaboration with Supportive Organizations:** Partner with nonprofits offering complementary services to enhance the overall support system. Collaborate with local agencies, nonprofits, and community leaders to gather information. Continue to cultivate relationships that align with the specific needs and goals of youth transitioning out of foster care. Implement collaborative case management practices that involve coordination between different organizations to provide comprehensive support.

Program Promotion

Public Awareness Campaign:

Community Events: Participate in community events to reach potential participants and stakeholders. Coordinate with representatives from local organizations, community leaders, youth advocates, and professionals. Plan diverse community events, including workshops, job fairs, health and wellness expos, educational seminars, and recreational activities. Tailor events to address various aspects of the transition to independence. Encourage local businesses to provide resources, job opportunities, and mentorship programs for youth.

Experience with Providing Supportive Services

The Just Dane "Empower Youth Transition Program" is committed to empowering youth leaving foster care, ensuring they have the necessary skills, resources, and support to navigate the challenges of independent living successfully. Just Dane is a leader in conducting and providing wrap around services that can holistically assist youth in transitioning to become productive adults.

JustDane has provided supportive services for criminal legal system impacted individuals and families since 1998. These services include reentry supports for previously incarcerated individuals as well as mentoring programs for youth impacted by parental incarceration and services for criminal legal system impacted youth ages 17-21.

These services will enhance independent living success and promote the dignity of residents by addressing needs with a one-on-one approach. This approach will include ongoing follow-up and case management where needed. Through provision of the wrap around service model, youth transitioning out of the foster care system housed at Park St. Lofts will have the tools necessary to strengthen family relations, identify necessary and beneficial resources, and positively impact their length of tenancy in this community.

DEVELOPER.

SUPPORTIVE SERVICES PROVIDER

By: _____
 FIRST NAME LAST NAME, TITLE

By: _____
 FIRST NAME LAST NAME, TITLE

Green Energy/ Sustainability Certification

APPENDIX M

WHEDA Housing Tax Credit Design Requirements

A. INITIAL SUBMITTAL REQUIREMENTS:

Submit a copy of this document signed by the development Architect and Applicant/Owner, certifying that all Development Requirements outlined in this Appendix M will be incorporated in the completed housing development.

Unless noted otherwise, references to section numbers are from ICC/ANSI A117.1–2017 edition.

“Building Code” refers to the 2015 edition of the International Building Code with Wisconsin’s amendments as found under SPS Chapters 361-366. Review SPS 361.05.

“ADAAG” refers to the ADA Accessibility Guidelines for Buildings and Facilities.

B. DEVELOPMENT REQUIREMENTS

I. REQUIRED ITEMS.

KEY: NC= New Construction and Adaptive Reuse of non-housing structure

R= Rehab of Existing Housing

Required For	ITEM
NC, R	Showerheads & faucets being replaced or initially installed: a) Low flow showerheads of 1.75 gpm, or less, must be installed on every showerhead within each dwelling unit in the development, and b) Faucet aerators with a rating of 1.5 gpm or less must be installed on every faucet within each dwelling unit in the development.
NC, R	Common Area Lighting being replaced or initially installed: Appropriate high efficiency lighting, including High Performance T-8 systems, T-5 systems, Compact Fluorescent Lamps (CFLs) or Light-Emitting Diode Lamps (LED), shall be installed in all interior common areas, including decorative fixtures.
NC, R	Appliances being replaced or initially installed: Must meet current ENERGY STAR® standard(s) if an ENERGY STAR rated appliance is available.
NC, R	Window or Central Air Conditioning Units being replaced or initially installed: Must meet current ENERGY STAR® standard(s).
NC, R	Setback Thermostats: All family housing units are required to incorporate setback thermostats.
NC, R	Lever-style handles on all interior doors being replaced or initially installed
NC, R	Bath/kitchen faucets being replaced or initially installed must be single-lever type.
NC, R	Mini blinds or similar window covering

NC, R	Common Laundry Facility. Alternatively, all units shall have at no charge: in-unit washer/dryer hook ups, or in-unit washer/dryer
NC, R	Hard-wired high speed internet service in each unit. For acquisition/rehab properties, wireless internet will be allowed
NC	Grab Bars – <i>In All Bathrooms of Elderly Buildings Only</i> . In each bathroom, install nylon grab bars meeting the requirements of Section 609 (matching or contrasting the color of the tub/shower) in the following locations minimum: a) In all showers, install one grab bar on the control end wall and one grab bar on the back wall. Grab bars shall be 6" maximum from adjacent walls. b) In all bathtubs, install one grab bar 24" minimum on the back wall and one grab bar 24" minimum on the control end wall per Fig. 607.4.2. Both grab bars to be installed horizontally at the same height above the floor. c) In all toilets, provide one horizontal side wall grab bar 42" minimum per Section 604.5.1 and provide on horizontal rear wall grab bar 24" – 36" minimum per Section 604.5.2.
NC	Bathtub/shower compartment permanently lined with non-skid surface or pattern covering 75% of floor.
NC	All Non-Elderly Housing (Family, General population or Supportive Housing). In all bathrooms of each unit, provide reinforcement for the future installation of grab bars at toilets, bathtubs, and shower compartments per Section 1104.11.1. (if grab bars not already installed in the unit)
NC	Provide all bathtubs/showers with offset controls and a 30" x 48" clear floor space for parallel approach. Where the centerline of the controls is between 18" and 9" from the open face of the bathtub/shower compartment, the clear floor space in front of the fixture shall extend at least 9" beyond the control wall. Where the centerline of the controls is between 9" and 0" from the open face of the bathtub/shower compartment, the clear floor space in front of the fixture shall extend at least 5" beyond the control wall.
NC	At least one toilet in each dwelling unit shall have clearances that meet the requirements of Section 1104.11.3.1.2.1, 1104.11.3.1.2.2, or 1104.11.3.1.2.3.
NC	Low-profile thresholds - All changes in level within common areas and in dwelling units to be ¼" maximum vertical or ½" maximum beveled at 1:2 per Sections 303.2 and 303.3.
NC	100% visitable units for 9% transactions, 50% visitable units for 4% and State/4% transactions. (Only 20% visitable units required for single family or duplex or townhome style construction). Projects should be designed and graded to allow an accessible route from parking or street level to all dwelling units. Accessible routes shall meet all the requirements of Section 402 including Section 404 for accessible doors. The living room, kitchen and minimum of one bathroom (with a minimum of a toilet and sink) must be on the accessible route from the unit entry. Bathroom shall meet the requirements of Sections 1104.11 minimum.
NC	Lighting controls, electrical switches, and receptacle outlets, environmental controls, and user controls for security or intercom systems shall comply with Section 1104.9 minimum.
NC	Electrical outlets and cable/data outputs set to a minimum height of 18" above the floor.

NC	Built-in Dishwasher and disposal-all 2 BR or larger units. Family developments only.
NC	Provide at least one bedroom on the first floor of multi-story units (minimum 4% of the development's multi-story units). Not required if the development includes other unit styles which achieve bedroom accessibility (minimum 4% of the total number of units).
NC	Individual storage lockers for each unit at no charge to resident. Minimum size of 3' X 6' X 8'. Must be inside storage but may not be located within residential units. Single family, duplex, or townhome styles are exempt. Individual garages satisfy this requirement.

II. BUILDING ENVELOPE REQUIREMENTS

New Construction

- Building envelope worksheet calculations: Must exceed the State of Wisconsin Department of Safety & Professional Services Building Envelope Requirements by, at minimum 2%, based upon (2015 IBC code) REScheck™ software calculations **AND** heating loads must be calculated at the maximum infiltration rate allowable in REScheck™ (0.5 air changes/hour).
- REScheck™ calculations must demonstrate compliance with State of Wisconsin building codes. REScheck™ reports are required for each building.
- These calculations must be submitted to WHEDA with the final Housing Tax Credit application for the development

Rehab Existing Housing and Adaptive Reuse Developments

- Rehab of Existing Housing and Adaptive Reuse developments must make efforts to exceed the State of Wisconsin Department of Safety & Professional Services Building Envelope Efficiency by 2% (2015 IBC code). REScheck™ reports are required for each building.
- If 2% cannot be achieved, Applicant must (at final application) provide a letter that describes best efforts and describes greater than normal efficiencies of ancillary items such as: window replacement “U” value, insulation “R” value, heating systems and lighting systems used in the development.
- If 2% cannot be achieved, Applicant must use building renovation components which meet the ENERGY STAR™ or equivalent building standards.
- These calculations must be submitted to WHEDA with the final Housing Tax Credit application for the development

C. FINAL SUBMITTAL REQUIREMENTS - All Developments

Development Owner and General Contractor/Architect certifications must be submitted to WHEDA with the final Housing Tax Credit application reflecting that 1) each building meets or exceeds requirements outlined in the Appendix M governing the year of the original application (use box below), and 2) each building meets or exceeds WHEDA's Building Envelope Requirements. See: www.wheda.com for Owner and General Contractor/Architect Certification forms.

➔ Download REScheck™ or COMcheck™ software from U.S. Department of Energy website:
<http://www.energycodes.gov/rescheck>

III. MINIMUM UNIT SIZES REQUIREMENTS

New Construction and Adaptive Reuse properties

- The average unit size for new construction and adaptive reuse units must meet the minimum square footage identified below:
 - Efficiency: 400 SF
 - 1-BR 575 SF
 - 2-BR 825 SF
 - 3-BR 1100 SF
 - 4+ BR 1200 SF

Note: Projects in the Supportive Housing Set-Aside are not required to meet the minimum sizes noted above.


Rehab of Existing Residential Developments

- Rehab of existing residential units will not be subject to the minimum unit size requirement.

IV. Sustainable Design

- As a **minimum threshold requirement**, properties are required to be built to the Wisconsin Green Built Home Standard (score of 150 or more) or the Enterprise Green Communities Criteria.
 - Properties that are awarded points Sustainable Design in WHEDA Scoring Category #2 – Energy Efficiency and Sustainability are required to be built to the specified level of sustainability.
 - **WHEDA will require the specified sustainable design certification prior to release of the 8609.**

Development Owner & Architect must sign and submit the following

Complete This Section and Submit With Initial Application <u> X </u>	
Complete This Section and Submit With Final Application _____	
Project Name:	<u> Park Lofts </u>
Project Type: (check one)	New Construction or Adaptive Reuse <u> X </u>
	Rehab Existing Housing _____
I/we certify the components listed above will be/are included in the subject project by signing below.	
Architect:	 _____ Steve Shulfer, AIA Sketchworks Architecture, LLC
	Date: <u> 12/15/2023 </u>
Applicant/Owner:	 _____ Julian Walters
	Date: <u> 12/15/2023 </u>



December 15, 2023

To whom it may concern:

Please be advised that we have reviewed the 2023-2024 WHEDA Tax Credit Appendix M and Application Requirements regarding the Tax Credit Application for the proposed project.

The Project will be non-smoking as the development will not allow smoking on site.

In addition, the Project will commit to meeting Enterprise 2020 Green Communities Criteria Green Build Criteria – Scoring Section 2.

The Drawings and Specifications of the Architect for the project will reflect the design specifications described in the items check on Universal Design – Scoring Section 9 will be incorporated into the development per the requirements of that Scoring Section.

CERTIFICATION

Based on the Architect's knowledge, information, and belief, the Architect certifies that the above statements are true and correct in the Architect's professional opinion. This certification is only intended for the benefit of the Recipient. Unless otherwise specifically agreed to by the Architect in writing, other person, or entities, including assigns and successors of the Recipient, shall not be considered beneficiaries, and shall not be entitled to rely upon this certification.

Respectfully,

SKETCHWORKS ARCHITECTURE, LLC

A handwritten signature in black ink, appearing to read "Steve Shulfer".

Steve Shulfer, AIA, Partner
Sketchworks Architecture, LLC

MEMORANDUM

To: Julian Walters, Eminent Development Corporation

From: Stephen Pipson

Project: Focus on Energy
Energy Design Assistance
Park Lofts, Madison, WI

Project No.: 4123202

Date: April 15, 2024

Summary: The purpose of the meeting on April 11, 2024 was to review the Energy Design Assistance program and energy savings associated with the Park Lofts project. Focus on Energy presented results at the meeting.

Focus on Energy collaborates with the project team to explore and quantify alternative materials and systems with the goal of selecting design strategies that are cost effective and have the highest value. Energy analysis results are used to determine custom incentives from Focus on Energy. The project team reviewed the strategy results and associated incremental cost information provided by Focus on Energy and assembled bundles of strategies based on the current design and group discussion.

Please select a bundle of energy efficiency strategies by May 17, 2024.

Contact Focus on Energy by email, phone call, voicemail, or other means to provide bundle selection, including any modifications.

Additional changes to the bundle selection can be made and will be captured during the verification phase.

Item: Model updates and requested information

- Removed HVAC Scenario C – Electric.
- Decreased Bundle 1 wall insulation value to R-20 insulation.
- Updated occupancy sensor controls.
- Reduced Bundle 1 exterior tradable site lighting load by 0.74 kW (30% reduction).
- Improved the snow melt boilers efficiency to 95% efficiency.

Action: The above changes are now incorporated, and the revised results, incentives, and paybacks are included in these minutes.

Item: Energy Utility Service and Rates

- Madison Gas & Electric, a participating Focus on Energy utility, will provide electric service for the building.
- Madison Gas & Electric, a participating Focus on Energy utility, will provide natural gas service for the building.
- Average electric and gas rates for the state of Wisconsin shall be used for the Design Assistance program. Actual rates may be applied if provided by the project team.

Action: **Julian Walters** to provide actual rates if desired.

Item: Owner Incentive

The Design Assistance program provides an incentive to the owner to help reduce the upfront costs associated with the addition of energy-saving strategies evaluated and verified by the program. The owner incentive is not intended to cover all increases in construction costs.

Julian Walters was identified as the point of contact for the owner incentive.

Action: **Focus on Energy** to provide **unidentified ownership entity** with the owner incentive following occupancy and program verification.

Item: Design Team Incentive

The Design Assistance program provides an incentive to the design team for their participation in the following activities: (1) attendance at formal meetings; (2) transfer of building architectural/engineering design information; and (3) development of applicable energy conservation strategies' incremental costs (incremental as compared to the base building design). Please note that the design team incentive is not intended to cover actual system(s) design or re-design associated with energy conservation strategies. The design team incentive will be paid out to the person identified as design team lead upon completion of the Bundle Requirements Document.

Steve Shulfer was identified as the point of contact for the design team incentive.

Action: **Focus on Energy** to provide **Sketchworks Architecture LLC** with the design team incentive upon completion of the Bundle Requirements Document.

Item: **Verification Phase**

Verification, a process that seeks to assure that one of the bundles is implemented, will be laid out in detail in the coming weeks but will include the following:

- Project Team notifies Focus on Energy of the bundle selection.
- Focus on Energy sends a Bundle Requirements Document to the project team, tailored to the selected bundle strategies.
- Focus on Energy processes design team incentive and sends payment to design team lead.
- Project Team sends Construction Documents to Focus on Energy, electronic format preferred.
- Project Team sends State of Wisconsin approved COMCheck submittal to Focus on Energy.
- Project Team sends requested equipment submittals to Focus on Energy.
- Field verification of select projects of installed strategies once the building is completed and occupied.
- Report by Focus on Energy as to status of strategy implementation.
- Focus on Energy provides incentive payment.

The purpose of the verification phase is to assist the project team and Focus on Energy toward realizing the energy conservation goals of the program and increasing the likelihood that the incentive proposed during the design phase is achieved upon completion of the project.

Item: **Next Steps**

Action: Upon bundle selection, **Focus on Energy** will prepare the Bundle Requirements Document.

Bundle Results Summary

Bundle 1 & 4 – energy efficiency strategies included in proposed design - **Good**

Bundle 2 & 5 – comprehensive energy efficiency strategies included - **Better**

Bundle 3 & 6 – Cost Optimized, energy efficiency strategies selected by the modeling software using the incremental cost from Bundle 1 and 4 - **Optimized**

Bundled Annual Savings

Bundle Description	Peak kW Savings	% Peak kW Savings	kWh Savings	% kWh Savings	Gas Savings (Therm)	% Gas Savings	Energy Cost Savings
Good	15	22	101,672	22	6,763	30	\$24,383
Better	17	26	119,365	26	7,455	33	\$28,098
Optimized	27	41	213,576	46	6,184	27	\$42,520
Good	15	22	161,572	24	4,712	34	\$32,205
Better	17	26	188,541	28	4,799	35	\$36,819
Optimized	29	44	259,999	39	5,091	37	\$49,122

Simple Payback with Incentive

Bundle Description	Energy Cost Savings	Incremental First Cost	Focus on Energy Electric Incentive	Focus on Energy Gas Incentive	Total Incentive	Payback in Years (after incentive)
Good	\$24,383	\$152,220	\$7,625	\$5,884	\$13,509	5.7
Better	\$28,098	\$208,875	\$8,952	\$6,486	\$15,438	6.9
Optimized	\$42,520	\$139,965	\$16,018	\$5,380	\$21,398	2.8
Good	\$32,205	\$145,427	\$12,118	\$4,099	\$16,217	4.0
Better	\$36,819	\$199,163	\$14,141	\$4,175	\$18,316	4.9
Optimized	\$49,122	\$129,817	\$19,500	\$4,429	\$23,929	2.2

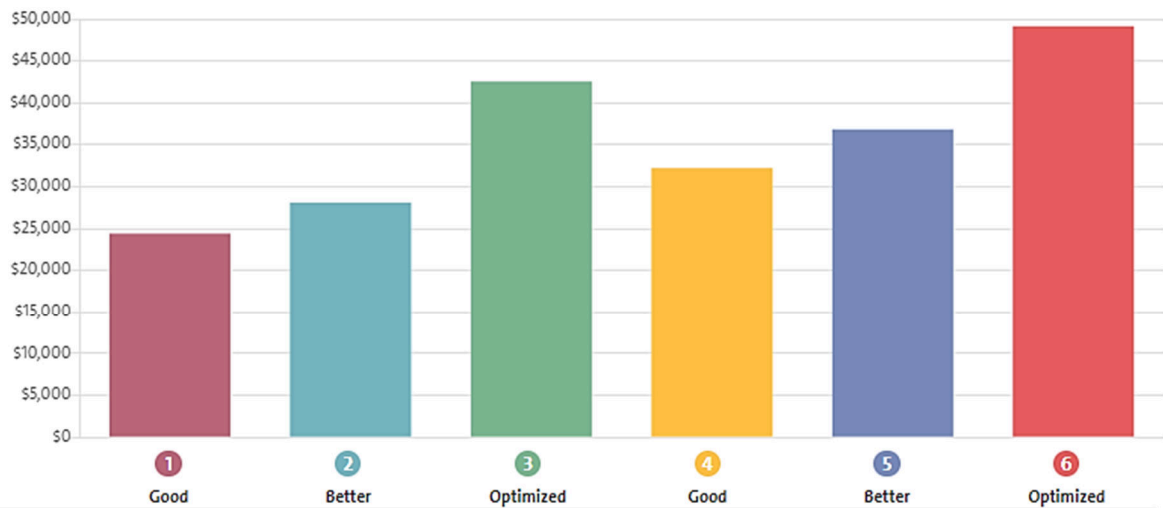
Energy Use Intensity

Bundle Description	Energy Use Intensity (kBtu/sf/yr)
Good	45.0
Better	42.9
Optimized	39.7
Good	41.8
Better	40.2
Optimized	35.8

Detailed strategy results are shown in the appendix.

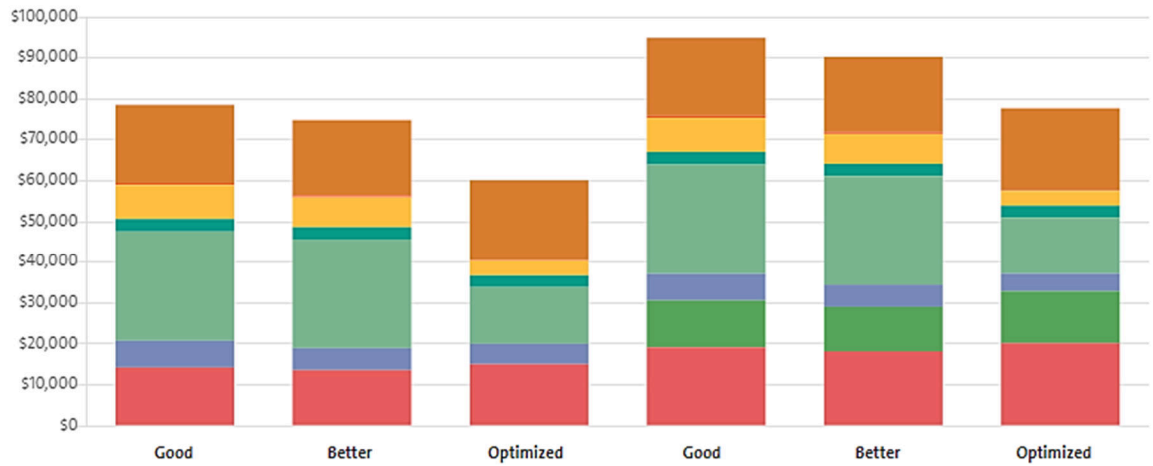
Results summary

The following chart shows Savings Summary, Energy Cost Savings for all bundles



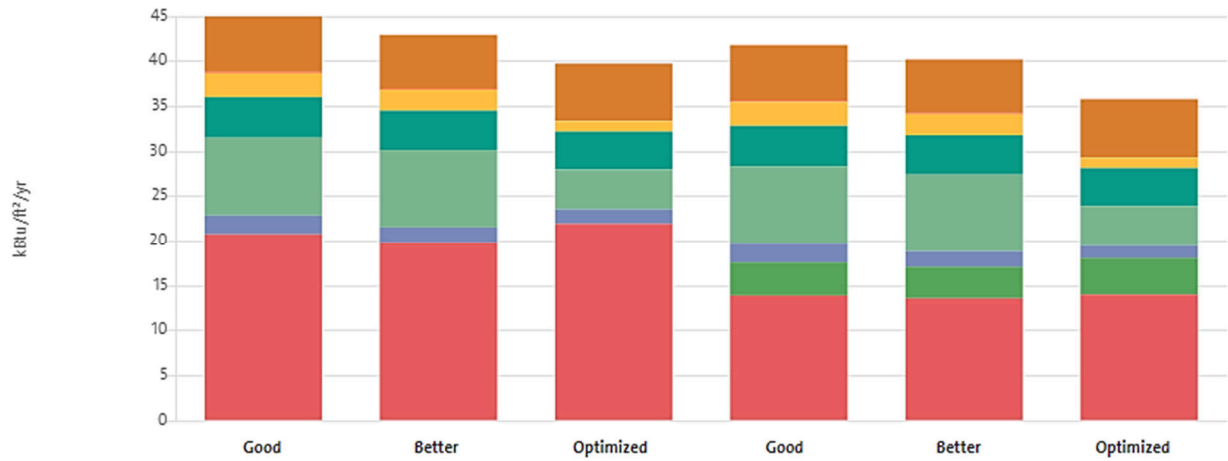
	1	2	3	4	5	6
	Good	Better	Optimized	Good	Better	Optimized
Energy Cost Savings	\$24,383 24 %	\$28,098 27 %	\$42,520 41 %	\$32,205 25 %	\$36,819 29 %	\$49,122 39 %
Peak Electric Savings (kW)	14.5 22 %	17.5 26 %	27.3 41 %	14.5 22 %	17.5 26 %	28.9 44 %
Electric Savings (kWh)	101,672 22 %	119,364 26 %	213,576 46 %	161,572 24 %	188,541 28 %	259,999 39 %
Gas Savings (Therm)	6,763 30 %	7,455 33 %	6,184 27 %	4,712 34 %	4,799 35 %	5,091 37 %
Projected Incentive	\$13,509	\$15,438	\$21,398	\$16,217	\$18,316	\$23,929
Net Incremental Cost	\$138,711	\$193,437	\$118,567	\$129,210	\$180,847	\$105,888
Payback with Incentive (yrs)	5.7	6.9	2.8	4.0	4.9	2.2
ROI with Incentive (%)	17.6 %	14.5 %	35.9 %	24.9 %	20.4 %	46.4 %
Energy Use Intensity (kBtu/ft ² /yr)	45.0	42.9	39.7	41.8	40.2	35.8
Source Savings (kBtu)	1,681,407 25 %	1,923,102 28 %	2,689,679 39 %	2,038,295 26 %	2,305,068 29 %	3,018,351 39 %
Site Savings (kBtu)	1,023,190 26 %	1,152,766 30 %	1,347,112 35 %	1,022,462 28 %	1,123,176 31 %	1,396,151 38 %
CO ₂ e Savings (lbs)	269,150.8	305,386.5	389,894.4	295,695.4	329,750.6	421,318.7

The following chart shows Cost by End Use for all bundles



	Good	Better	Optimized	Good	Better	Optimized
Total	\$78,471	\$74,756	\$60,091	\$94,832	\$90,218	\$77,643
Interior Equipment	\$19,047	\$18,396	\$19,640	\$19,047	\$18,396	\$19,986
Exterior Lighting	\$472	\$405	\$135	\$472	\$405	\$134
Interior Lighting	\$8,313	\$7,314	\$3,632	\$8,313	\$7,314	\$3,631
Domestic Hot Water	\$3,076	\$2,978	\$2,873	\$3,076	\$2,978	\$2,873
Fans	\$26,822	\$26,736	\$13,813	\$26,820	\$26,734	\$13,888
Cooling	\$6,528	\$5,365	\$4,983	\$6,529	\$5,367	\$4,315
Supplemental Heat				\$11,459	\$10,884	\$12,667
Heating	\$14,213	\$13,562	\$15,016	\$19,116	\$18,141	\$20,148

The following chart shows Energy by End Use for all bundles



	Good	Better	Optimized	Good	Better	Optimized
Total (kBTu/ft ² /yr)	45.0	42.9	39.7	41.8	40.2	35.8
Interior Equipment (kBTu/ft ² /yr)	6.1	5.9	6.3	6.1	5.9	6.4
Exterior Lighting (kBTu/ft ² /yr)	0.2	0.1	0.0	0.2	0.1	0.0
Interior Lighting (kBTu/ft ² /yr)	2.7	2.4	1.2	2.7	2.4	1.2
Domestic Hot Water (kBTu/ft ² /yr)	4.5	4.3	4.2	4.5	4.3	4.2
Fans (kBTu/ft ² /yr)	8.6	8.6	4.5	8.6	8.6	4.5
Cooling (kBTu/ft ² /yr)	2.1	1.7	1.6	2.1	1.7	1.4
Supplemental Heat (kBTu/ft ² /yr)				3.7	3.5	4.1
Heating (kBTu/ft ² /yr)	20.8	19.8	21.9	13.9	13.6	14.0



Building Summary

Building Summary		
Location	Madison, WI	
Narrative	Multi-Family Housing, new construction	
Space Asset Areas	Area	Number of Stories
Studio Apartments	3,117 ft ²	3
Corridors	18,006 ft ²	5
Apartments - Med/High Rise	31,051 ft ²	5
Common Areas - Multifamily	2,226 ft ²	3
Garage - Enclosed	8,747 ft ²	1
Total	63,147 ft²	5
Exterior lighting	From NEO	
Systems Summary		
Envelope	Walls: Metal frame 1st floor and wood frame 2nd-5th with R-26 (21 cavity + 5 exterior) Roof: Wood frame with R-35/40 continuous	
Glazing	Frame type: 1st floor metal and all other floors vinyl Unit U-value: 0.32 SHGC: 0.29	
Lighting	LED throughout Occupancy sensors	
Plug/Process	Typical per space type ENERGY STAR appliances and bath fans	
Service Water Heating	Gas-fired tank with low flow fixtures	
Elevators	1 MRL traction elevator	
Snow Melt	Possible for parking ramp, estimated 1,000 ft ² included in analysis	
Hours of Operation	Typical apartment hours – 24/7	
HVAC Scenario A: Gas	Corridors, Common Areas - Multifamily: single zone air handler with gas furnace and DX; Studio Apartments, Apartments - Med/High Rise: single zone air handler with gas furnace and DX; Garage - Enclosed: single zone air handler with gas furnace	
HVAC Scenario B: Gas & Electric	Studio Apartments, Apartments - Med/High Rise: Air source heat pump; Corridors, Common Areas - Multifamily: Air source heat pump; Garage - Enclosed: single zone air handler with electric coil	
Utilities		
Electric Utility	Madison Gas & Electric	
Gas Utility	Madison Gas & Electric	
Schedule		
Construction Documents Complete	08/31/2024	
Construction Start	10/31/2024	
Occupancy	12/31/2025	
Baseline Reference	ASHRAE 90.1-2013 Appendix G	

Other Notes

Solar Ready Building - At verification provide a stamped structural drawing demonstrating the roof load can withstand at least five pounds per square foot (psf) additional load (compared to code requirements). Plus, an electrical one-line diagram identifying the point of interconnection. Incentive \$2,500

Appendix A. Detailed Strategy Results

Results for HVAC Scenario A: Gas

Strategy	Annual Savings			Energy Cost	Incremental First Cost	Payback (yrs.)	Payback (yrs.)		
	Peak kW	kWh	Gas (Therm)				1 : Good	2 : Better	3 : Optimized
Mechanical									
Corridors/Common areas - single zone split system									
Electronically commutated motor	0.4	3,680	-55	\$562	\$2,801	5.0	x	x	x
Variable speed fan at 67% minimum flow	6.2	47,568	-973	\$6,921	\$4,684	0.7			
Variable speed fan at 30% minimum flow	10.6	82,973	-1,757	\$12,008	\$4,684	0.4			x
5% improved DX cooling efficiency	0.3	529	0	\$88	\$3,752	42.6	x		
10% improved DX cooling efficiency	0.5	1,007	0	\$170	\$7,504	44.1		x	
20% improved DX cooling efficiency	0.9	1,836	0	\$310	\$15,007	48.4			
30% improved DX cooling efficiency	1.3	2,526	0	\$425	\$22,511	53.0			
High efficiency DX compressor part load performance	0.9	1,863	0	\$313	\$14,507	46.3			
Premium efficiency DX compressor part load performance	2.4	4,888	0	\$822	\$29,514	35.9			
90% efficient gas furnace	0	0	199	\$215	\$3,188	14.8			
95% efficient gas furnace	0	0	282	\$307	\$4,818	15.7	x	x	
Sensible heat recovery	0.7	5,360	769	\$1,733	\$14,125	8.2			x
Total heat recovery	-0.4	-6,624	849	-\$191	\$13,531	n/a			
Occupancy sensor control of zone temperature for Common Areas - Multifamily	0.1	422	35	\$107	\$524	4.9			x
Apartments - single zone split system									
Electronically commutated motor	0.8	8,858	-168	\$1,305	\$4,731	3.6	x	x	x
5% improved DX cooling efficiency	0.9	2,266	0	\$381	\$6,336	16.6	x		
10% improved DX cooling efficiency	1.7	4,324	0	\$727	\$12,672	17.4		x	
20% improved DX cooling efficiency	3.1	7,923	0	\$1,329	\$25,344	19.1			
30% improved DX cooling efficiency	4.3	10,972	0	\$1,841	\$38,016	20.6			
90% efficient gas furnace	0	0	833	\$904	\$5,383	6.0			
95% efficient gas furnace	0	0	1,184	\$1,282	\$8,137	6.3	x	x	x
Sensible heat recovery	-0.6	-23,079	1,988	-\$1,712	\$23,083	n/a			
Total heat recovery	-2.2	-25,767	2,219	-\$1,914	\$17,983	n/a			
Programmable thermostats for Studio Apartments	0	125	48	\$72	\$148	2.1	x		
Communicating thermostats for Studio Apartments	0.1	628	72	\$186	\$676	3.6		x	
Smart thermostats for Studio Apartments	0.2	860	73	\$223	\$1,060	4.8			x
Programmable thermostats for Apartments - Med/High Rise	0.1	1,182	552	\$798	\$1,088	1.4	x		

Strategy	Annual Savings				Incremental First Cost	Payback (yrs.)	1 : Good	2 : Better	3 : Optimized
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Communicating thermostats for Apartments - Med/High Rise	1.3	6,494	837	\$1,996	\$4,961	2.5		x	
Smart thermostats for Apartments - Med/High Rise	2	8,985	844	\$2,423	\$7,776	3.2			x
Garage - gas unit heaters									
Electronically commutated motor	0.1	822	-16	\$122	\$1,211	9.9	x	x	x
90% efficient gas furnace	0	0	724	\$785	\$1,378	1.8	x	x	
95% efficient gas furnace	0	0	1,029	\$1,114	\$2,083	1.9			x
CO sensor control of outdoor air	0	3,779	2,218	\$3,040	\$5,052	1.7	x	x	x
Architectural									
Facility									
10% reduced air infiltration	0	8	84	\$93	\$1,914	20.6			
20% reduced air infiltration	0.1	25	229	\$253	\$3,829	15.1		x	
Common Areas - Multifamily									
Wall R-20	0	207	79	\$120	\$1,276	10.6	x		
Wall R-24	0	346	124	\$193	\$2,442	12.7		x	x
Roof R-36	0	70	32	\$47	\$933	19.8	x		
Roof R-40	0	80	36	\$52	\$1,179	22.7		x	
Roof R-50	0	98	44	\$67	\$1,793	26.8			
White roof	0	20	-5	-\$3	\$498	n/a			
Glazing high solar gain, non-metal frame	0	406	140	\$223	-\$3,897	0.0			
Glazing medium solar gain, non-metal frame	0.3	538	97	\$194	\$466	2.4	x	x	
Glazing medium solar gain w/ argon, non-metal frame	0.3	714	159	\$293	-\$3,147	0.0			
Glazing high solar gain triple pane, non-metal frame	0.2	1,148	304	\$525	\$5,475	10.4			
Glazing medium solar gain high, transparency triple pane, non-metal frame	0.4	1,240	277	\$510	\$6,413	12.6			
Glazing medium solar gain triple pane, non-metal frame	0.4	1,249	273	\$506	\$5,944	11.7			
Glazing high solar gain triple pane w/ argon, non-metal frame	0.2	1,332	345	\$597	\$6,038	10.1			x
Glazing medium solar gain, high transparency triple pane w/ argon, non-metal frame	0.4	1,421	321	\$587	\$6,975	11.9			
Glazing medium solar gain triple pane w/ argon, non-metal frame	0.4	1,431	317	\$586	\$6,506	11.1			
Studio Apartments									
Wall R-20	0	-5	24	\$27	\$377	14.0	x		
Wall R-24	0	-12	39	\$41	\$722	17.6		x	x
Roof R-36	0	-2	53	\$59	\$1,306	22.1	x		
Roof R-40	0	-2	60	\$65	\$1,650	25.4		x	
Roof R-50	0	-4	73	\$78	\$2,511	32.2			
White roof	0	119	-12	\$9	\$498	55.3			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs.)	1 : Good	2 : Better	3 : Optimized
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Glazing high solar gain, non-metal frame	0	-14	44	\$46	\$1,151	25.0			
Glazing medium solar gain, non-metal frame	0.1	323	5	\$59	\$138	2.3	x	x	
Glazing medium solar gain w/ argon, non-metal frame	0.1	289	28	\$79	\$930	11.8			x
Glazing high solar gain triple pane, non-metal frame	0.1	81	90	\$114	\$1,618	14.2			
Glazing medium solar gain high, transparency triple pane, non-metal frame	0.1	354	61	\$127	\$1,894	14.9			
Glazing high solar gain triple pane w/ argon, non-metal frame	0.1	45	107	\$123	\$1,784	14.5			
Glazing medium solar gain, high transparency triple pane w/ argon, non-metal frame	0.1	322	79	\$139	\$2,061	14.8			
Apartments - Med/High Rise									
Wall R-20	0.1	-89	462	\$488	\$6,151	12.6	x		
Wall R-24	0.2	-165	735	\$771	\$11,774	15.3		x	
Roof R-36	0.1	13	319	\$348	\$7,805	22.4	x		
Roof R-40	0.1	15	363	\$397	\$9,863	24.8		x	
Roof R-50	0.2	13	440	\$481	\$15,009	31.2			
White roof	0.3	742	-71	\$47	\$498	10.6			x
Glazing high solar gain, non-metal frame	0.2	-193	838	\$880	\$18,790	21.4			
Glazing medium solar gain, non-metal frame	1.3	3,613	435	\$1,080	\$2,247	2.1	x	x	
Glazing medium solar gain w/ argon, non-metal frame	1.2	3,137	827	\$1,422	\$15,181	10.7			x
Glazing high solar gain triple pane, non-metal frame	1	1,089	1,843	\$2,180	\$26,411	12.1			
Glazing medium solar gain high, transparency triple pane, non-metal frame	1.7	4,003	1,550	\$2,352	\$30,932	13.2			
Glazing medium solar gain triple pane, non-metal frame	1.9	4,524	1,505	\$2,392	\$28,671	12.0			
Glazing high solar gain triple pane w/ argon, non-metal frame	1	576	2,137	\$2,415	\$29,123	12.1			
Glazing medium solar gain, high transparency triple pane w/ argon, non-metal frame	1.7	3,551	1,856	\$2,609	\$33,644	12.9			
Glazing medium solar gain triple pane w/ argon, non-metal frame	1.9	4,079	1,813	\$2,650	\$31,384	11.8			
Corridors									
Roof R-36	0.1	68	181	\$207	\$4,526	21.9	x		
Roof R-40	0.1	78	206	\$237	\$5,719	24.1		x	
Roof R-50	0.1	93	249	\$285	\$8,703	30.5			
White roof	0.2	261	-41	-\$2	\$498	n/a			
Lighting									
Facility									
Exterior tradable site lighting reduced to 0.84 kW	0	805	0	\$136	\$319	2.3			

Strategy	Annual Savings			Energy Cost	Incremental First Cost	Payback (yrs.)	Payback (yrs.)		
	Peak kW	kWh	Gas (Therm)				1 : Good	2 : Better	3 : Optimized
Exterior tradable site lighting reduced to 0.74 kW	0	1,207	0	\$203	\$478	2.4	x		
Exterior tradable site lighting reduced to 0.63 kW	0	1,610	0	\$271	\$637	2.4		x	
Exterior tradable site lighting reduced to 0.53 kW	0	2,013	0	\$340	\$796	2.3			
Exterior tradable site lighting reduced to 0.42 kW	0	2,415	0	\$405	\$956	2.4			
Exterior tradable site lighting reduced to 0.32 kW	0	2,817	0	\$472	\$1,115	2.4			
Exterior tradable site lighting reduced to 0.21 kW	0	3,220	0	\$542	\$1,274	2.4			x
Common Areas - Multifamily									
Occupancy sensor controls, 75% of space	0	311	-5	\$47	\$104	2.2		x	
Occupancy sensor controls, 100% of space	0.1	550	-9	\$84	\$208	2.5			x
Lighting power in Common Areas - Multifamily reduced to 0.46 W/ft ²	0.1	439	-7	\$66	\$149	2.3			
Lighting power in Common Areas - Multifamily reduced to 0.41 W/ft ²	0.2	878	-13	\$133	\$297	2.2			
Lighting power in Common Areas - Multifamily reduced to 0.36 W/ft ²	0.2	1,319	-20	\$200	\$437	2.2			
Lighting power in Common Areas - Multifamily reduced to 0.31 W/ft ²	0.3	1,762	-27	\$269	\$566	2.1	x	x	
Lighting power in Common Areas - Multifamily reduced to 0.26 W/ft ²	0.4	2,200	-34	\$333	\$686	2.1			x
High-end trim, 10% lighting power reduction	0.1	439	-7	\$66	\$132	2.0			x
Studio Apartments									
Lighting power in Studio Apartments reduced to 0.75 W/ft ²	0.1	963	-17	\$143	\$611	4.3			
Lighting power in Studio Apartments reduced to 0.64 W/ft ²	0.1	1,283	-23	\$191	\$793	4.2	x		
Lighting power in Studio Apartments reduced to 0.54 W/ft ²	0.1	1,603	-29	\$238	\$961	4.0		x	
Lighting power in Studio Apartments reduced to 0.43 W/ft ²	0.1	1,926	-35	\$286	\$1,116	3.9			
Lighting power in Studio Apartments reduced to 0.32 W/ft ²	0.1	2,247	-41	\$335	\$1,257	3.8			
Lighting power in Studio Apartments reduced to 0.21 W/ft ²	0.2	2,565	-47	\$381	\$1,385	3.6			
Lighting power in Studio Apartments reduced to 0.11 W/ft ²	0.2	2,886	-53	\$427	\$1,500	3.5			x
Apartments - Med/High Rise									
Lighting power in Apartments - Med/High Rise reduced to 0.75 W/ft ²	0.6	9,619	-178	\$1,419	\$6,089	4.3			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs.)	1 : Good	2 : Better	3 : Optimized
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Lighting power in Apartments - Med/High Rise reduced to 0.64 W/ft ²	0.8	12,819	-238	\$1,891	\$7,898	4.2	x		
Lighting power in Apartments - Med/High Rise reduced to 0.54 W/ft ²	1	16,021	-299	\$2,364	\$9,572	4.0		x	
Lighting power in Apartments - Med/High Rise reduced to 0.43 W/ft ²	1.2	19,209	-361	\$2,830	\$11,114	3.9			
Lighting power in Apartments - Med/High Rise reduced to 0.32 W/ft ²	1.4	22,404	-422	\$3,303	\$12,522	3.8			
Lighting power in Apartments - Med/High Rise reduced to 0.21 W/ft ²	1.6	25,607	-484	\$3,770	\$13,797	3.7			
Lighting power in Apartments - Med/High Rise reduced to 0.11 W/ft ²	1.8	28,803	-547	\$4,238	\$14,939	3.5			x
Corridors									
Occupancy sensor controls, 50% of space	0	0	0	\$0	\$0	n/a			
Occupancy sensor controls, 75% of space	0.4	2,718	-40	\$416	\$842	2.0		x	
Occupancy sensor controls, 100% of space	0.7	4,803	-69	\$729	\$1,685	2.3			x
Lighting power in Corridors reduced to 0.36 W/ft ²	1.9	11,483	-167	\$1,746	\$3,531	2.0			
Lighting power in Corridors reduced to 0.31 W/ft ²	2.6	15,332	-229	\$2,325	\$4,580	2.0	x	x	
Lighting power in Corridors reduced to 0.26 W/ft ²	3.3	19,199	-294	\$2,902	\$5,551	1.9			x
High-end trim, 10% lighting power reduction	0.6	3,816	-53	\$582	\$1,064	1.8			x
Garage - Enclosed									
Occupancy sensor controls, 50% of space	0.1	939	-12	\$142	\$327	2.3	x	x	
Occupancy sensor controls, 75% of space	0.2	2,112	-26	\$322	\$737	2.3			x
Lighting power in Garage - Enclosed reduced to 0.15 W/ft ²	0.5	3,601	-45	\$557	\$1,715	3.1			
Lighting power in Garage - Enclosed reduced to 0.13 W/ft ²	0.7	4,801	-60	\$738	\$2,225	3.0	x		
Lighting power in Garage - Enclosed reduced to 0.10 W/ft ²	0.8	6,001	-76	\$926	\$2,697	2.9		x	
Lighting power in Garage - Enclosed reduced to 0.08 W/ft ²	1	7,201	-93	\$1,108	\$3,131	2.8			
Lighting power in Garage - Enclosed reduced to 0.06 W/ft ²	1.2	8,401	-110	\$1,294	\$3,527	2.7			x
High-end trim, 10% lighting power reduction	0.2	1,200	-14	\$186	\$517	2.8			x
Plug/Process									
Facility									
90% snow melt boiler efficiency	0	0	319	\$347	\$327	0.9			
95% snow melt boiler efficiency	0	0	453	\$492	\$512	1.0	x	x	x
Traction elevator, machine roomless	0.4	2,154	0	\$364	\$21,197	58.2	x	x	
Traction elevator, regenerative	0.6	2,892	0	\$484	\$42,394	87.6			

Strategy	Annual Savings			Energy Cost	Incremental First Cost	Payback (yrs.)	1 : Good	2 : Better	3 : Optimized
	Peak kW	kWh	Gas (Therm)						
Studio Apartments									
Clothes washers, ENERGY STAR minimum certification efficiency	0.1	1,572	-17	\$245	\$1,187	4.8	x		
Clothes washers, ENERGY STAR high efficiency	0.2	1,843	-21	\$285	\$2,967	10.4		x	x
Clothes dryers, ENERGY STAR minimum certification efficiency	0	215	-3	\$34	\$1,780	52.4	x		
Dishwashers, ENERGY STAR minimum certification efficiency	0	-113	14	\$0	\$593	n/a	x	x	
Refrigerators, ENERGY STAR minimum certification efficiency	0	439	-6	\$68	\$1,780	26.2	x		
Refrigerators, ENERGY STAR high efficiency	0.1	657	-9	\$102	\$3,560	34.9		x	
Bathroom exhaust fan, ENERGY STAR minimum certification efficiency	0	276	-4	\$43	\$242	5.6	x		x
Bathroom exhaust fan, ENERGY STAR premium efficiency	0	422	-6	\$67	\$1,331	19.9		x	
Apartments - Med/High Rise									
Clothes washers, ENERGY STAR minimum certification efficiency	0.9	11,557	-130	\$1,797	\$8,703	4.8	x		
Clothes washers, ENERGY STAR high efficiency	1.1	13,555	-158	\$2,103	\$21,758	10.3		x	x
Clothes dryers, ENERGY STAR minimum certification efficiency	0.1	1,581	-22	\$244	\$13,055	53.5	x		
Dishwashers, ENERGY STAR minimum certification efficiency	-0.1	-837	107	-\$25	\$4,352	n/a	x	x	
Refrigerators, ENERGY STAR minimum certification efficiency	0.3	3,236	-44	\$495	\$13,055	26.4	x		
Refrigerators, ENERGY STAR high efficiency	0.4	4,843	-66	\$744	\$26,110	35.1		x	
Bathroom exhaust fan, ENERGY STAR minimum certification efficiency	0.2	2,015	-27	\$310	\$1,774	5.7	x		x
Bathroom exhaust fan, ENERGY STAR premium efficiency	0.3	3,119	-42	\$481	\$9,759	20.3		x	
Service Water Heating									
Facility									
90% SWH efficiency	0	0	554	\$602	\$862	1.4			
95% SWH efficiency	0	0	758	\$818	\$1,305	1.6	x	x	x
Gas fired on-demand SWH	0	0	329	\$357	\$29,373	82.3			
Studio Apartments									
Showerheads, WaterSense fixture flow at 2.00 gpm	0	0	42	\$43	\$60	1.4			
Showerheads, WaterSense fixture flow at 1.75 gpm	0	0	63	\$66	\$128	1.9	x	x	
Showerheads, WaterSense fixture flow at 1.50 gpm	0	0	84	\$88	\$178	2.0			x
Sink faucets, low flow	0	0	23	\$25	\$9	0.4	x		

Strategy	Annual Savings				Incremental First Cost	Payback (yrs.)	Performance		
	Peak kW	kWh	Gas (Therm)	Energy Cost			1 : Good	2 : Better	3 : Optimized
Sink faucets, ultra-low flow	0	0	34	\$36	\$13	0.3		x	x
Apartments - Med/High Rise									
Showerheads, WaterSense fixture flow at 2.00 gpm	0	0	417	\$451	\$441	1.0			
Showerheads, WaterSense fixture flow at 1.75 gpm	0	0	625	\$676	\$940	1.4	x	x	
Showerheads, WaterSense fixture flow at 1.50 gpm	0	0	833	\$901	\$1,307	1.5			x
Sink faucets, low flow	0	0	230	\$249	\$64	0.3	x		
Sink faucets, ultra-low flow	0	0	338	\$367	\$92	0.2		x	x

Results for HVAC B: Gas & Electric

Strategy	Annual Savings				Incremental First Cost	Payback (yrs.)	4 : Good	5 : Better	6 : Optimized
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Mechanical									
Apartments - heat pump, electric backup									
Electronically commutated motor	0.8	5,641	0	\$946	\$4,731	5.0	x	x	x
5% improved heat pump cooling efficiency	0.9	3,395	0	\$569	\$3,176	5.6	x		
10% improved heat pump cooling efficiency	1.7	6,394	0	\$1,072	\$6,353	5.9		x	
20% improved heat pump cooling efficiency	3.1	11,389	0	\$1,910	\$12,706	6.7			x
30% improved heat pump cooling efficiency	4.3	15,290	0	\$2,564	\$19,059	7.4			
5% improved heat pump heating efficiency	0	2,571	0	\$432	\$2,112	4.9	x		
10% improved heat pump heating efficiency	0	4,850	0	\$815	\$4,224	5.2		x	
20% improved heat pump heating efficiency	0	8,621	0	\$1,446	\$8,448	5.8			
30% improved heat pump heating efficiency	0	11,517	0	\$1,931	\$12,672	6.6			x
Low temperature heat pump heating	0	323	0	\$55	\$89,549	100+			
Sensible heat recovery	-0.6	7,199	0	\$1,209	\$23,083	19.1			
Total heat recovery	-2.2	7,643	0	\$1,283	\$17,983	14.0			
Programmable thermostats for Studio Apartments	0	733	0	\$122	\$148	1.2	x		
Communicating thermostats for Studio Apartments	0.1	1,424	0	\$239	\$676	2.8		x	
Smart thermostats for Studio Apartments	0.2	1,586	0	\$266	\$1,060	4.0			x
Programmable thermostats for Apartments - Med/High Rise	0.2	8,201	0	\$1,376	\$1,088	0.8	x		
Communicating thermostats for Apartments - Med/High Rise	1.3	15,468	0	\$2,594	\$4,961	1.9		x	
Smart thermostats for Apartments - Med/High Rise	2	17,040	0	\$2,857	\$7,776	2.7			x
Corridors/Common areas - heat pump, electric backup									
Electronically commutated motor	0.4	3,015	0	\$508	\$2,801	5.5	x	x	x
Variable speed fan at 67% minimum flow	6.1	36,570	0	\$6,133	\$4,684	0.8			
Variable speed fan at 30% minimum flow	10.5	68,027	0	\$11,408	\$4,684	0.4			x
High efficiency DX compressor part load performance	0.9	1,863	0	\$312	\$14,507	46.5			
Premium efficiency DX compressor part load performance	2.4	4,887	0	\$820	\$29,514	36.0			
5% improved heat pump cooling efficiency	0.3	1,171	0	\$197	\$1,881	9.5	x		
10% improved heat pump cooling efficiency	0.5	2,226	0	\$373	\$3,762	10.1		x	
20% improved heat pump cooling efficiency	0.9	4,058	0	\$681	\$7,524	11.0			
30% improved heat pump cooling efficiency	1.3	5,584	0	\$936	\$11,285	12.1			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs.)	4 : Good	5 : Better	6 : Optimized
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Low temperature heat pump heating	0	5,829	0	\$978	\$53,025	54.2			
Sensible heat recovery	0.7	20,617	0	\$3,460	\$14,125	4.1			x
Total heat recovery	-0.4	9,402	0	\$1,579	\$13,531	8.6			
Occupancy sensor control of zone temperature for Common Areas - Multifamily	0.1	802	0	\$136	\$524	3.9			x
Garage - electric unit heaters									
Electronically commutated motor	0.1	822	-16	\$118	\$1,211	10.3	x	x	
90% efficient gas furnace	0	0	724	\$784	\$1,378	1.8	x	x	
95% efficient gas furnace	0	0	1,029	\$1,113	\$2,083	1.9			x
CO sensor control of outdoor air	0	3,779	2,218	\$3,038	\$5,052	1.7	x	x	x
Architectural									
Facility									
10% reduced air infiltration	0	1,100	0	\$186	\$1,914	10.3			
20% reduced air infiltration	0.1	2,956	0	\$496	\$3,829	7.7		x	
Studio Apartments									
Wall R-20	0	320	0	\$54	\$377	7.0	x		
Wall R-24	0	506	0	\$85	\$722	8.5		x	
Roof R-36	0	695	0	\$118	\$1,306	11.1	x		
Roof R-40	0	790	0	\$132	\$1,650	12.5		x	
Roof R-50	0	951	0	\$161	\$2,511	15.6			
White roof	0	-21	0	-\$4	\$498	n/a			
Glazing high solar gain, non-metal frame	0	568	0	\$96	\$1,151	12.0			
Glazing medium solar gain, non-metal frame	0.1	330	0	\$56	\$138	2.5	x	x	x
Glazing medium solar gain w/ argon, non-metal frame	0.1	595	0	\$100	\$930	9.3			
Glazing high solar gain triple pane, non-metal frame	0.1	1,266	0	\$213	\$1,618	7.6			
Glazing medium solar gain high, transparency triple pane, non-metal frame	0.1	1,095	0	\$185	\$1,894	10.2			
Glazing high solar gain triple pane w/ argon, non-metal frame	0.1	1,460	0	\$245	\$1,784	7.3			
Glazing medium solar gain, high transparency triple pane w/ argon, non-metal frame	0.1	1,304	0	\$219	\$2,061	9.4			
Apartments - Med/High Rise									
Wall R-20	0.1	6,066	0	\$1,016	\$6,151	6.1	x		x
Wall R-24	0.2	9,599	0	\$1,608	\$11,774	7.3		x	
Roof R-36	0.1	4,351	0	\$731	\$7,805	10.7	x		
Roof R-40	0.1	4,917	0	\$825	\$9,863	12.0		x	
Roof R-50	0.2	5,953	0	\$1,000	\$15,009	15.0			
White roof	0.3	-130	0	-\$21	\$498	n/a			
Glazing high solar gain, non-metal frame	0.2	10,918	0	\$1,830	\$18,790	10.3			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs.)	4 : Good	5 : Better	6 : Optimized
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Glazing medium solar gain, non-metal frame	1.2	2,691	0	\$452	\$2,247	5.0	x	x	x
Glazing medium solar gain w/ argon, non-metal frame	1.2	7,289	0	\$1,223	\$15,181	12.4			
Glazing high solar gain triple pane, non-metal frame	1	25,349	0	\$4,250	\$26,411	6.2			
Glazing medium solar gain high, transparency triple pane, non-metal frame	1.8	17,365	0	\$2,913	\$30,932	10.6			
Glazing medium solar gain triple pane, non-metal frame	1.9	17,233	0	\$2,892	\$28,671	9.9			
Glazing high solar gain triple pane w/ argon, non-metal frame	1	28,756	0	\$4,822	\$29,123	6.0			
Glazing medium solar gain, high transparency triple pane w/ argon, non-metal frame	1.7	20,913	0	\$3,509	\$33,644	9.6			
Glazing medium solar gain triple pane w/ argon, non-metal frame	1.9	20,830	0	\$3,494	\$31,384	9.0			
Common Areas - Multifamily									
Wall R-20	0	1,065	0	\$179	\$1,276	7.1	x		
Wall R-24	0	1,719	0	\$288	\$2,442	8.5		x	
Roof R-36	0	394	0	\$67	\$933	13.9	x		
Roof R-40	0	447	0	\$75	\$1,179	15.7		x	
Roof R-50	0	545	0	\$92	\$1,793	19.5			
White roof	0	-28	0	-\$2	\$498	n/a			
Glazing high solar gain, non-metal frame	0	1,960	0	\$329	-\$3,897	0.0			
Glazing medium solar gain, non-metal frame	0.3	1,473	0	\$246	\$466	1.9	x	x	
Glazing medium solar gain w/ argon, non-metal frame	0.3	2,368	0	\$400	-\$3,147	0.0			x
Glazing high solar gain triple pane, non-metal frame	0.2	4,708	0	\$791	\$5,475	6.9			
Glazing medium solar gain high, transparency triple pane, non-metal frame	0.4	4,332	0	\$727	\$6,413	8.8			
Glazing medium solar gain triple pane, non-metal frame	0.4	4,271	0	\$716	\$5,944	8.3			
Glazing high solar gain triple pane w/ argon, non-metal frame	0.2	5,485	0	\$919	\$6,038	6.6			
Glazing medium solar gain, high transparency triple pane w/ argon, non-metal frame	0.4	5,122	0	\$861	\$6,975	8.1			
Glazing medium solar gain triple pane w/ argon, non-metal frame	0.4	5,069	0	\$852	\$6,506	7.6			
Corridors									
Roof R-36	0.1	1,691	0	\$284	\$4,526	15.9	x		
Roof R-40	0.1	1,921	0	\$323	\$5,719	17.7		x	
Roof R-50	0.1	2,339	0	\$393	\$8,703	22.1			
White roof	0.1	-107	0	-\$17	\$498	n/a			
Lighting									

Strategy	Annual Savings			Incremental First Cost	Payback (yrs.)	4 : Good	5 : Better	6 : Optimized
	Peak kW	kWh	Gas (Therm)					
Facility								
Exterior tradable site lighting reduced to 0.84 kW	0	805	0	\$136	\$319	2.3		
Exterior tradable site lighting reduced to 0.74 kW	0	1,208	0	\$204	\$478	2.3	x	
Exterior tradable site lighting reduced to 0.63 kW	0	1,610	0	\$270	\$637	2.4		x
Exterior tradable site lighting reduced to 0.53 kW	0	2,012	0	\$338	\$796	2.4		
Exterior tradable site lighting reduced to 0.42 kW	0	2,415	0	\$405	\$956	2.4		
Exterior tradable site lighting reduced to 0.32 kW	0	2,817	0	\$473	\$1,115	2.4		
Exterior tradable site lighting reduced to 0.21 kW	0	3,219	0	\$540	\$1,274	2.4		x
Studio Apartments								
Lighting power in Studio Apartments reduced to 0.75 W/ft ²	0.1	747	0	\$125	\$611	4.9		
Lighting power in Studio Apartments reduced to 0.64 W/ft ²	0.1	994	0	\$167	\$793	4.7	x	
Lighting power in Studio Apartments reduced to 0.54 W/ft ²	0.1	1,240	0	\$208	\$961	4.6		x
Lighting power in Studio Apartments reduced to 0.43 W/ft ²	0.1	1,490	0	\$250	\$1,116	4.5		
Lighting power in Studio Apartments reduced to 0.32 W/ft ²	0.1	1,738	0	\$292	\$1,257	4.3		
Lighting power in Studio Apartments reduced to 0.21 W/ft ²	0.2	1,981	0	\$333	\$1,385	4.2		
Lighting power in Studio Apartments reduced to 0.11 W/ft ²	0.2	2,231	0	\$374	\$1,500	4.0		x
Apartments - Med/High Rise								
Lighting power in Apartments - Med/High Rise reduced to 0.75 W/ft ²	0.6	7,358	0	\$1,236	\$6,089	4.9		
Lighting power in Apartments - Med/High Rise reduced to 0.64 W/ft ²	0.8	9,788	0	\$1,643	\$7,898	4.8	x	
Lighting power in Apartments - Med/High Rise reduced to 0.54 W/ft ²	1	12,230	0	\$2,053	\$9,572	4.7		x
Lighting power in Apartments - Med/High Rise reduced to 0.43 W/ft ²	1.2	14,648	0	\$2,457	\$11,114	4.5		
Lighting power in Apartments - Med/High Rise reduced to 0.32 W/ft ²	1.4	17,086	0	\$2,866	\$12,522	4.4		
Lighting power in Apartments - Med/High Rise reduced to 0.21 W/ft ²	1.6	19,509	0	\$3,272	\$13,797	4.2		
Lighting power in Apartments - Med/High Rise reduced to 0.11 W/ft ²	1.8	21,938	0	\$3,680	\$14,939	4.1		x
Common Areas - Multifamily								

Strategy	Annual Savings			Energy Cost	Incremental First Cost	Payback (yrs.)	4 : Good	5 : Better	6 : Optimized
	Peak kW	kWh	Gas (Therm)						
Occupancy sensor controls, 75% of space	0	263	0	\$46	\$104	2.3		x	
Occupancy sensor controls, 100% of space	0.1	464	0	\$78	\$208	2.7			x
Lighting power in Common Areas - Multifamily reduced to 0.46 W/ft ²	0.1	371	0	\$62	\$149	2.4			
Lighting power in Common Areas - Multifamily reduced to 0.41 W/ft ²	0.2	745	0	\$125	\$297	2.4			
Lighting power in Common Areas - Multifamily reduced to 0.36 W/ft ²	0.2	1,114	0	\$188	\$437	2.3			
Lighting power in Common Areas - Multifamily reduced to 0.31 W/ft ²	0.3	1,488	0	\$249	\$566	2.3	x	x	
Lighting power in Common Areas - Multifamily reduced to 0.26 W/ft ²	0.4	1,860	0	\$312	\$686	2.2			x
High-end trim, 10% lighting power reduction	0.1	371	0	\$62	\$132	2.1			x
Corridors									
Occupancy sensor controls, 50% of space	0	0	0	\$0	\$0	n/a			
Occupancy sensor controls, 75% of space	0.4	2,195	0	\$370	\$842	2.3		x	
Occupancy sensor controls, 100% of space	0.7	3,920	0	\$656	\$1,685	2.6			x
Lighting power in Corridors reduced to 0.36 W/ft ²	1.9	9,278	0	\$1,557	\$3,531	2.3			
Lighting power in Corridors reduced to 0.31 W/ft ²	2.6	12,310	0	\$2,068	\$4,580	2.2	x	x	
Lighting power in Corridors reduced to 0.26 W/ft ²	3.2	15,410	0	\$2,585	\$5,551	2.1			x
High-end trim, 10% lighting power reduction	0.6	3,117	0	\$523	\$1,064	2.0			x
Garage - Enclosed									
Occupancy sensor controls, 50% of space	0.1	939	-12	\$143	\$327	2.3	x	x	
Occupancy sensor controls, 75% of space	0.2	2,112	-26	\$325	\$737	2.3			x
Lighting power in Garage - Enclosed reduced to 0.15 W/ft ²	0.5	3,601	-45	\$556	\$1,715	3.1			
Lighting power in Garage - Enclosed reduced to 0.13 W/ft ²	0.7	4,801	-60	\$740	\$2,225	3.0	x		
Lighting power in Garage - Enclosed reduced to 0.10 W/ft ²	0.8	6,001	-76	\$922	\$2,697	2.9		x	
Lighting power in Garage - Enclosed reduced to 0.08 W/ft ²	1	7,201	-93	\$1,106	\$3,131	2.8			
Lighting power in Garage - Enclosed reduced to 0.06 W/ft ²	1.2	8,401	-110	\$1,290	\$3,527	2.7			x
High-end trim, 10% lighting power reduction	0.2	1,200	-14	\$184	\$517	2.8			x
Plug/Process									
Facility									
90% snow melt boiler efficiency	0	0	319	\$345	\$327	0.9			
95% snow melt boiler efficiency	0	0	453	\$492	\$512	1.0	x	x	x

Strategy	Annual Savings			Energy Cost	Incremental First Cost	Payback (yrs.)	4 : Good	5 : Better	6 : Optimized
	Peak kW	kWh	Gas (Therm)						
Traction elevator, machine roomless	0.4	2,154	0	\$362	\$21,197	58.6	x	x	
Traction elevator, regenerative	0.6	2,893	0	\$486	\$42,394	87.2			
Studio Apartments									
Clothes washers, ENERGY STAR minimum certification efficiency	0.1	1,314	4	\$222	\$1,187	5.3	x		x
Clothes washers, ENERGY STAR high efficiency	0.1	1,540	4	\$260	\$2,967	11.4		x	
Clothes dryers, ENERGY STAR minimum certification efficiency	0	181	0	\$30	\$1,780	59.3	x		
Dishwashers, ENERGY STAR minimum certification efficiency	0	-94	13	-\$1	\$593	n/a	x	x	
Refrigerators, ENERGY STAR minimum certification efficiency	0	368	0	\$63	\$1,780	28.3	x		
Refrigerators, ENERGY STAR high efficiency	0.1	552	0	\$94	\$3,560	37.9		x	
Bathroom exhaust fan, ENERGY STAR minimum certification efficiency	0	232	0	\$39	\$242	6.2	x		x
Bathroom exhaust fan, ENERGY STAR premium efficiency	0	355	0	\$61	\$1,331	21.8		x	
Apartments - Med/High Rise									
Clothes washers, ENERGY STAR minimum certification efficiency	0.9	9,605	27	\$1,639	\$8,703	5.3	x		x
Clothes washers, ENERGY STAR high efficiency	1.1	11,249	27	\$1,913	\$21,758	11.4		x	
Clothes dryers, ENERGY STAR minimum certification efficiency	0.1	1,320	0	\$222	\$13,055	58.8	x		
Dishwashers, ENERGY STAR minimum certification efficiency	-0.1	-687	95	-\$12	\$4,352	n/a	x	x	
Refrigerators, ENERGY STAR minimum certification efficiency	0.3	2,703	0	\$454	\$13,055	28.8	x		
Refrigerators, ENERGY STAR high efficiency	0.4	4,044	0	\$679	\$26,110	38.5		x	
Bathroom exhaust fan, ENERGY STAR minimum certification efficiency	0.2	1,679	0	\$281	\$1,774	6.3	x		x
Bathroom exhaust fan, ENERGY STAR premium efficiency	0.3	2,607	0	\$437	\$9,759	22.3		x	
Service Water Heating									
Facility									
90% SWH efficiency	0	0	554	\$600	\$862	1.4			
95% SWH efficiency	0	0	758	\$820	\$1,305	1.6	x	x	x
Gas fired on-demand SWH	0	0	329	\$354	\$29,373	83.0			
Studio Apartments									
Showerheads, WaterSense fixture flow at 2.00 gpm	0	0	42	\$44	\$60	1.4			
Showerheads, WaterSense fixture flow at 1.75 gpm	0	0	63	\$66	\$128	1.9	x	x	

Strategy	Annual Savings			Incremental First Cost	Payback (yrs.)	4 : Good	5 : Better	6 : Optimized
	Peak kW	kWh	Gas (Therm)					
Showerheads, WaterSense fixture flow at 1.50 gpm	0	0	84	\$88	\$178	2.0		x
Sink faucets, low flow	0	0	23	\$24	\$9	0.4	x	
Sink faucets, ultra-low flow	0	0	34	\$36	\$13	0.3		x
Apartments - Med/High Rise								
Showerheads, WaterSense fixture flow at 2.00 gpm	0	0	416	\$450	\$441	1.0		
Showerheads, WaterSense fixture flow at 1.75 gpm	0	0	625	\$676	\$940	1.4	x	x
Showerheads, WaterSense fixture flow at 1.50 gpm	0	0	833	\$900	\$1,307	1.5		x
Sink faucets, low flow	0	0	230	\$249	\$64	0.3	x	
Sink faucets, ultra-low flow	0	0	338	\$366	\$92	0.3		x

Appendix B. Key Model Inputs

Utility Rates

Fuel	Utility	Rate
Electric	Madison Gas & Electric	Average rate: \$0.1677 \$/kWh
Gas	Madison Gas & Electric	Average rate: \$1.08 \$/therm

Copies:

Attendees shown in **bold**.

Name	Company	Email	Phone
Julian Walters	Eminent Development Corporation	julianwalters02@gmail.com	608.235.5837
Steve Shulfer	Sketchworks Architecture LLC	sshulfer@sketchworksarch.com	608.836.7570
Ross Treichel	Sketchworks Architecture LLC	rtreichel@sketchworksarch.com	608.836.7570
Bernie Lange	National Construction	bernie@jgdevelopment.com	608.230.7383
Eric Truelove	Green Building Resources LLC	eric@greenbuildingresourcesonline.com	608.332.8444
Emily Millar	Focus on Energy	emily.millar@focusonenergy.com	606.663.3750
Brenna Dowd	Focus on Energy	BDowd@willdan.com	952.938.1588
Stephen Pipson	Focus on Energy	stephen.pipson@focusonenergy.com	608.949.9694

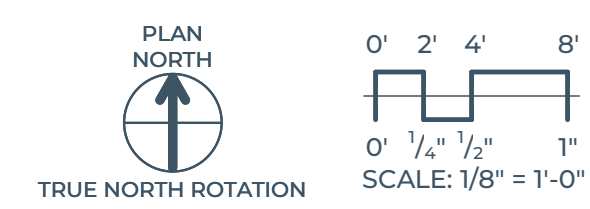
Site Plans

LEVEL INFORMATION

- A. ~11,050 SF
- B. JUST DANE OFFICE AND FLEX ROOM
- C. APARTMENT MANAGEMENT OFFICE
- D. 2 SINGLE OCCUPANT RESTROOMS
- E. WORK OUT SPACE
- F. MAIL/PACKAGE ROOM
- G. BUILDING MECHANICALS
- H. BIKE PARKING/STORAGE LOCKERS
- I. TRASH ROOM
- J. COVERED GARAGE PARKING, 17 STALLS
- K. 1 ELEVATOR FOR RESIDENTS
- L. 2 EGRESS STAIRS
- M. MECHANICAL ROOM
- N. UNIT COUNTS:

ROOM LEGEND

- 2 BEDROOM
- BIKE STORAGE
- CORRIDOR
- ELEVATOR
- FITNESS
- JUST DANE FLEX ROOM
- JUST DANE OFFICE
- LOBBY
- MAIL
- MANAGEMENT
- MECHANICAL
- PARKING
- R/R
- STAIR
- TRASH ROOM
- VESTIBULE



DATE: 07/08/2024 1 OF 7

DESIGN PARTNERS

DESIGN PARTNERS



PARK LOFTS
FIRST FLOOR PLAN



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LEVEL INFORMATION

- A. ~11,050 SF
- B. BUILDING MECHANICALS
- C. STORAGE UNITS
- D. 1 ELEVATOR FOR RESIDENTS
- E. 2 EGRESS STAIRS
- F. UNIT COUNTS:
 - a. 2 BEDROOM: 4
 - b. 1 BEDROOM: 3
 - c. 1 BEDROOM + DEN: 2
 - d. STUDIO: 2

ROOM LEGEND

- 1 BEDROOM
- 1 BEDROOM + DEN
- 2 BEDROOM
- CORRIDOR
- ELEVATOR
- MECHANICAL
- STAIR
- STORAGE
- STUDIO



DATE: 07/02/2024 2 OF 7

DEVELOPMENT PARTNERS



PARK LOFTS

SECOND - FOURTH FLOOR PLAN

DESIGN PARTNERS



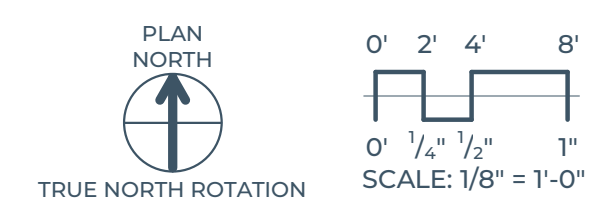
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LEVEL INFORMATION

- C. RESIDENT CLUB ROOM AND PATIO
- D. BUILDING MECHANICALS
- E. STORAGE UNITS
- F. 1 ELEVATOR FOR RESIDENTS
- G. 2 EGRESS STAIRS
- H. UNIT COUNTS:
 - a. 2 BEDROOM: 3
 - b. 1 BEDROOM: 2
 - c. 1 BDROOM + DEN: 2
 - d. STUDIO: 2

ROOM LEGEND

- 1 BEDROOM
- 1 BEDROOM + DEN
- 2 BEDROOM
- CLUB ROOM
- CORRIDOR
- ELEVATOR
- MECHANICAL
- PATIO
- STAIR
- STORAGE
- STUDIO



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PARK LOFTS

FIFTH FLOOR PLAN

DEVELOPMENT PARTNERS



DESIGN PARTNERS



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EAST ELEVATION - COLOR



NORTH ELEVATION - COLOR



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EXTERIOR ELEVATIONS

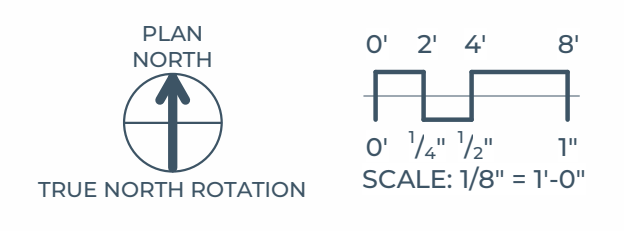




WEST ELEVATION - COLOR



SOUTH ELEVATION - COLOR



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DESIGN PARTNERS



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EXTERIOR ELEVATIONS



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3D VIEW - SOUTHEAST



3D VIEW - NORTHEAST



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EXTERIOR 3D VIEWS



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3D VIEW - NORTHWEST



3D VIEW - SOUTHWEST



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PARK LOFTS

EXTERIOR 3D VIEWS



	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	TOTAL
INCOME																					
Gross Potential Income: (Excluding TIF & Other)	2.00%	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####	#####
Other Income Source	2.00%																				
Vacancy - Rental Income	-7.00%	(41,186)	(42,010)	(42,800)	(43,707)	(44,582)	(45,473)	(46,383)	(47,310)	(48,257)	(49,222)	(50,206)	(51,210)	(52,234)	(53,279)	(54,345)	(55,432)	(56,540)	(57,671)	(58,824)	(60,001)
Vacancy - Other Income	-7.00%																				
Total Vacancy		(\$41,186)	(\$42,010)	(\$42,800)	(\$43,707)	(\$44,582)	(\$45,473)	(\$46,383)	(\$47,310)	(\$48,257)	(\$49,222)	(\$50,206)	(\$51,210)	(\$52,234)	(\$53,279)	(\$54,345)	(\$55,432)	(\$56,540)	(\$57,671)	(\$58,824)	(\$60,001)
Effective Gross Income		\$47,192	\$58,135	\$59,298	\$59,684	\$59,298	\$64,144	\$66,227	\$68,551	\$71,122	\$73,945	\$77,023	\$80,364	\$83,971	\$87,851	\$91,999	\$96,412	\$101,087	\$106,031	\$111,244	\$116,725
EXPENSES																					
Rent Expense	3.00%	550	567	583	601	619	638	657	676	697	718	739	761	784	808	832	857	883	909	936	964
Management Fees	3.00%	32,831	33,816	34,831	35,876	36,952	38,061	39,203	40,379	41,590	42,838	44,123	45,446	46,810	48,214	49,661	51,150	52,685	54,265	55,893	57,570
Other Admin Expenses / Less Management	3.00%	68,820	70,576	72,653	74,874	77,120	79,433	81,816	84,271	86,799	89,403	92,085	94,848	97,693	100,624	103,643	106,752	109,954	113,253	116,651	120,150
Utilities Expense	3.00%	58,025	57,708	58,437	61,220	63,057	64,948	66,897	68,904	70,971	73,100	75,293	77,552	79,878	82,275	84,743	87,285	89,904	92,601	95,379	98,240
Operations and Maintenance Expense	3.00%	70,080	78,280	80,828	83,047	85,359	88,105	90,748	93,470	96,276	99,163	102,138	105,202	108,358	111,609	114,957	118,406	121,958	126,616	129,385	133,266
Real Estate and Personal Property Taxes	3.00%	42,357	43,627	44,936	46,284	47,673	49,103	50,576	52,093	53,656	55,266	56,924	58,632	60,391	62,202	64,068	65,990	67,970	70,009	72,110	74,273
Other Taxes and Insurance	3.00%	46,703	48,104	49,547	51,034	52,565	54,142	55,766	57,439	59,162	60,937	62,760	64,648	66,587	68,585	70,642	72,767	74,948	77,193	79,509	81,894
Service Expense	3.00%	40,000	41,200	42,436	43,709	45,020	46,371	47,762	49,195	50,671	52,191	53,757	55,369	57,027	58,741	60,504	62,319	64,188	66,114	68,097	70,140
Replacement Reserve	3.00%	13,200	13,095	14,004	14,425	14,857	15,302	15,761	16,234	16,721	17,223	17,740	18,272	18,820	19,385	19,966	20,565	21,182	21,818	22,473	23,146
Total Expenses		\$74,186	\$87,472	\$89,096	\$91,058	\$93,491	\$96,103	\$98,186	\$100,641	\$103,438	\$106,483	\$109,779	\$113,332	\$117,144	\$121,215	\$125,546	\$130,137	\$134,988	\$140,101	\$145,476	\$151,123
Net Operating Income		\$17,006	\$17,654	\$17,202	\$16,615	\$16,897	\$16,041	\$16,741	\$16,889	\$16,811	\$16,107	\$16,461	\$15,834	\$15,720	\$15,498	\$15,292	\$15,362	\$14,708	\$14,422	\$14,092	\$13,510
Debt Service - 1st Mortgage		\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037
WHEDA Permanent Mortgage		\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037	\$33,037
Total Debt Service		\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074	\$66,074
DISCR - 1st		1,285	1,283	1,279	1,275	1,270	1,263	1,256	1,247	1,237	1,226	1,214	1,200	1,185	1,168	1,150	1,130	1,109	1,086	1,061	1,034
Cash Flow		\$7,969	\$7,627	\$7,165	\$6,579	\$3,860	\$3,004	\$3,404	\$3,853	\$3,544	\$3,070	\$2,824	\$2,597	\$2,483	\$2,372	\$2,325	\$2,325	\$2,325	\$2,325	\$2,325	\$2,325
Asset Management Fee	4400	4,400	4,532	4,668	4,808	4,952	5,101	5,254	5,411	5,574	5,741	5,913	6,091	6,273	6,462	6,655	-	-	-	-	81,835
Cash Flow		\$3,569	\$3,095	\$2,497	\$1,771	\$3,908	\$2,903	\$2,850	\$2,741	\$2,970	\$2,429	\$2,511	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507
Debt Service - Housing Trust Fund																					
WHEDA HTF P&I		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total HTF Debt Service		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
DISCR - WHEDA HTF (min 1.05 years 1-15)		1.29	1.28	1.28	1.27	1.27	1.26	1.26	1.25	1.24	1.23	1.21	1.20	1.18	1.17	1.15	1.13	1.11	1.09	1.06	1.03
Cash Flow		\$3,569	\$3,095	\$2,497	\$1,771	\$3,908	\$2,903	\$2,850	\$2,741	\$2,970	\$2,429	\$2,511	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507
DDF	323100	\$3,569	\$3,095	\$2,497	\$1,771	\$3,908	\$2,903	\$2,850	\$2,741	\$2,970	\$2,429	\$2,511	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507	\$2,507
		289,321	296,437	303,939	312,169	321,261	331,307	342,307	354,261	367,166	381,027	395,851	411,645	428,416	446,161	464,886	484,600	505,301	527,087	549,967	573,950