DANE COUNTY APPLICATION FOR 2025 AFFORDABLE HOUSING DEVELOPMENT FUND

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

APPLICATION SUMMARY

ORGANIZATION NAME	**Lutheran Social Services of Wisconsin and Upper Michigan, Inc. & JT Klein Company, Inc**	
MAILING ADDRESS If P.O. Box, include Street Address on second line	818 S Park Street Madison, WI 53715	
TELEPHONE	(612) 202-1577	**LEGAL STATUS**
FAX NUMBER	N/A	☐ Private, Non-Profit ☒ Private, For Profit ☐ Other: LLC, LLP, Sole Proprietor Federal EIN: 47-4551112 Unique Entity Identifier (UEI): JXC5N41WQ5W4
NAME CHIEF ADMIN/ CONTACT	Jacob T. Klein	
INTERNET WEBSITE (if applicable)	www.jtklein.com	
E-MAIL ADDRESS	jacob@jtklein.com, kevin@jtklein.com dafable@jtklein.com	

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

PROJECT NAME	PROJECT CONTACT PERSON	PHONE NUMBER	E-MAIL
Oak Ridge Fitchburg	Jacob T. Klein	6122021577	jacob@jtklein.com

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

TOTAL PROJECT COST	AMOUNT OF AHDF FUNDS REQUESTED	PECENT OF AHDF FUNDS TO TOTAL PROJECT COST
$25,500,000	$8,000,000	31.37%

Signature of Chief Elected Official/Organization Head

President
Title

Jacob Klein
Printed Name

8/2/2025
Date

PROJECT DESCRIPTION

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

Project Name:	Oak Ridge Fitchburg
Project Address:	Orchard Pointe Lot 11 (Approx. 6270 Nesbitt Rd.)
City, State, Zip:	Fitchburg, WI, 53719
Parcel Number:	225/0609-072-5711-2
Census Tract:	107.02

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.

Oak Ridge Fitchburg (ORF) will be located at approximately 6270 Nesbitt Rd on the West side of Fitchburg, WI. The site currently a vacant field in the Orchard Pointe neighborhood, which is one of the fast growing areas of Fitchburg. The site was put under contract in November of 2024, and the development team immediately approached City staff and elected officials to discuss the highest and best use for the site. The mayor, district alders, and staff supported this project and identified this site a high priority for development with an emphasis on affordable senior housing. ORF alligns with many of the stated housing objectives within the Fitchburg Comprehensive Plan and Housing Study. The West side of Fitchburg has not see a new affordable senior housing development on this side of town in decades. Staff wrote the development team a preliminary zoning letter to be submitted with our 9% WHEDA tax credit application, which we were successful in obtaining.

The development team held a neighborhood meeting on March 13th 2025 at the JTK workforce project, Limestone Ridge, just a few blocks from ORF. The meeting was attended by one neighbor and several Fitchburg elected officials and staff. The development team received positive feedback and most of the questions were to learn more about the development.

On March 18th 2025, the development team went before Plan Commission for a Minor Comprehensive Plan amendment, a required step prior to submitted a rezoning applications. The Plan Commission voted in favor and approved the Minor Comprehensive Plan amendment.

On July 15th, 2025, the development team presented a pre-application concept plan to the Plan Commission. This is a required step to obtain feedback but does not involve the Plan Commission making a vote. Plan Commission expressed support for the project and asked that the project consider stormwater management and connectivity to the adjecent bike path.

JTK has continued to work with staff to modify the site and address all engineering, planning, and fire department suggestions. JTK will submit a PDD-GIP rezoning application to Plan Commission on August 18th, 2025.The development team expects to have full zoning approval in October of 2025.

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 Fitchburg has expressed a strong desire to work with JT Klein to make the project successful. The development team has had multiple conversations with staff to design a site plan that aligns with with City goals. As mentioned in in Paragraph B, the City has modified it's Comprehensive Plan to allow the development to proceed. Staff has indicated that the current site plan meets the desires of planning, engineering, and the fire department.

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

ORF will be working with the City to apply for the Dane County Workforce Housing Loan. This is a loan product that offers more competitive interest rates to affordable housing projects. JTK and Fitchburg successfully obtained this funds on a previous development, Limestone Ridge.

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

Residential housing is a permitted use under current zoning. At the suggestion of City staff, the development team is pursuing a Planned Development District to allow for site design flexibility. JTK received approval for a minor comp plan amendment on March 18th, 2025 and will submit an application for PDD zoning on August 18th 2025. JTK expects to have zoning in place by October of 2025.

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

ORF will be an 80-unit affordable senior housing development located at approximately 6270 Nesbitt Rd. in Fitchburg, WI. The site is located on a bus line directly South of the Orchard Pointe Shopping center. The neighborhood is ideal for affordable senior housing due to it's close proximity to everyday amenities including 3 grocery stores, a gym, and several restaurants in walking distance.The site is also located about 2 blocks away from JT Klein's 116 unit Limestone Ridge workforce housing development constructed in 2021.

This project will provide high-quality, affordable housing for seniors ages 62 and better in Dane County. ORF will be a 4-story development consisting of a mix of 1 and 2 bedroom apartments, with rents restricted for households earning between 30% and 80% of the Area Median Income (AMI). Additionally, 34 units will be at 50%bringing the percentage of units at 50% and under to 63.75%

Of the 80 total units, 17 units will be reserved for households at the 30% AMI level, which is considered extremely low income. These units will be prioritized for seniors who utilize supportive services, targeting persons with disabilities, veterans, and those who are formerly homeless or are housing insecure.

ORF will set aside 20% (16) of the total units to target households experiencing homelessness. To help support these units, JT Klein has partnered with Lutheran Social Services (LSS), one of Wisconsin’s most experienced and respected nonprofit housing and service providers. LSS will provide optional on-site supportive services and coordinate referrals through the Housing Services Case (HSC) list. Comprehensive supportive services, through a collaborative services model—

beginning with referrals from the Coordinated Entry (CE) system and continuing throughout each resident's tenancy. From move-in day forward, residents will have the ability to connect to individualized services and supports needed to maintain housing stability and long-term success. These units will be held open for a minimum of 30 days once it becomes vacant. If the unit remains vacant after 30 days, the management team will attempt to fill the unit with other vulnerable populations, such as veterans, very low-income families, individuals who are elderly, individuals with disabilities, and/or households experiencing domestic violence.

Future residents can expect a sustainable, energy-efficient building with quality finishes and amenities that are comparable to market-rate properties. Because ORF is a senior-focused building, it will not include any 3-bedroom units. The Fitchburg Comprehensive Plan shows a significant need in the Fitchburg area for affordable 1 and 2 bedroom housing tailored to older adults.

Oak Ridge Fitchburg will have a minimum affordability period of 40 years. This development is aligned with the City of Fitchburg's long-term planning goals and will transform an under utilized vacant site into a vibrant, service-supported residential community. Its proximity to community resources and amenities makes it an ideal location for senior affordable housing and a meaningful addition to the village's housing landscape.

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

40 Years

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

No

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

N/A

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

Yes	No
☒	☐

If yes, indicate which certification will be pursued:

Tier 1	
New Construction	
☐	Enterprise 2020 Green Communities Certification Plus

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

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

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

ON OR BEFORE	**MILESTONES**
Purchased Site	4/1/2026
Final City Zoning	10/22/2025
WHEDA 9% Award	5/30/2025
Final Architect Drawings	12/31/2025
Collection of Awards Bids	3/1/2026
Close on Financing	4/1/2026
Start Construction	4/1/2026
Begin Marketing	12/1/2026
Accept Applications	2/1/2027
Certified Occupancy Stabilized Occupancy	6/1/2027 12/31/2027

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

ADDRESS #1:	Orchard Pointe Lot 11										
	# 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%	17	0	13	4	0	0	0	730	876	0	0
40%	0	0	0	0	0	0	0	0	0	0	0
50%	34	0	22	12	0	0	0	1217	1461	0	0
60%	0	0	0	0	0	0	0	0	0	0	0
80%	29	0	13	16	0	0	0	1450	1650	0	0
Affordable Sub total	80	0	48	32	0	0	0	-	-	-	-
Market	0	0	0	0	0	0	0	0	0	0	0
Total Units	80	0	48	32	0	0	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?

(1 BR 30%) Max 30% Rent
(1 BR 50%) Max 50% Rent
(1 BR 80%) 25% Below Max
(2 BR 30%) Max 30% Rent
(2 BR 50%) Max 50% Rent
(2 BR 80%) 27% Below Max

Every attempt to limit rent increases at lease renewals will be made to ensure that the housing remains affordable and accessible to our senior residents. To achieve this, we adhere to local rent control or rent limits. We will also review comparable rates to remain competitive while ensuring the property's financial stability. Maintaining good tenant relations is a priority, so we strive to keep rent increases moderate and justifiable. Expenses have a major impact on the rent increases. Recently, we have seen substantial expense increases to insurance, utilities, building materials, interest rates,and taxes. These costs can impact the overall financial health of the property, necessitating a fair rent adjustment. It is always difficult operating in a fluctuating expense environment, but the goal of balancing affordability for our senior residents with the property's sustainability is a top priority. Since this is a senior age restricted property and many tenants are on fixed incomes the renewal is often tied to the increase in social security for that year, but never move more than 5%.

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

☐	Community Building, square feet:
☒	Community Room, square feet: 700
☐	Garages, number: and monthly rent:
☒	Surface parking, number: 31 and monthly rent: 0
☒	Underground parking, number 58 and monthly rent: 35

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

Oak Ridge Fitchburg will offer the same high-quality finishes and amenities found in every affordable housing development within the JT Klein Company portfolio. JTK's senior portfolio provides additional accessible design features tailored to a senior population. ORF residents can expect accesible features such as handrails on both sides of common hallways, automatic door openers, low pile or no carpeted areas, and light switches compliant with Section 309. A portion of apartment units will provide roll in showers, bathroom/shower grab bars, and ADA height counter tops.

JT Klein's finish level consistently rivals and often exceeds the quality seen in many market-rate developments. Each unit is thoughtfully designed to maximize resident satisfaction while minimizing turnover and maintenance costs. Inside each apartment, residents will enjoy luxury vinyl plank flooring throughout, creating a modern and durable living space. Kitchens will be equipped with Energy Star-rated stainless steel appliances, complemented by ample cabinet storage and granite countertops that add both style and function. Every unit will also include a full-size, in-unit washer and dryer to provide convenience and ease of use for residents. The majority of units will also include individual balconies and oversized bedroom closests.

ORF will also feature a range of on-site amenities specifically tailored to meet the needs of senior residents. The building will include a spacious community room designed for gatherings, events, and resident activities. Adjacent to that, a community dining area will provide a welcoming space for shared meals and social engagement. Residents will also have access to an outdoor patio area equipped with grills, offering a comfortable setting for warm-weather gatherings.

Additional amenities will include an exercise room outfitted with senior-friendly machines will support residents' health and wellness. Bike parking and individual storage units will be available to ensure each resident has adequate space for personal belongings. Heated underground parking will offer added comfort and convenience, especially during Wisconsin's colder months, and an on-site leasing office will provide easy access to property management and resident support.

Consistent with all JT Klein developments, ORF will incorporate sustainable design features aimed at environmental responsibility and long-term operational efficiency. ORF will be pursuing the Wisconsin Green Built Communities Gold Plus certificate or an equivalent sustainable certificate. Providing an energy efficient design and reducing the developments carbon footprint.The development team has experience with the costs and testing associated with this level of sustainable design. JT Klein has another affordable project under construction that has committed to a similar level of sustainable design.

LOCATION

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

Oak Ridge Fitchburg is the perfect location for affordable senior housing in Fitchburg. The majority of resident's everyday neighborhood amenities are within a 1 mile radius, many of them within walking or biking distance.

The development site is located on the West side of Fitchburg, surrounded by a variety of community amenities that enhance residents' quality of life. 2 blocks North of the site is the Orchard Pointe shopping center providing easy access to grocery stores, restaurants and other retail outlets. This includes the Super Target, HyVee, ALDI, Great Clips, Pet Supplies Plus, UW Credit Union, The Flying Hound Alehouse, and Buffalo Wing Wilds. On the same block as ORF is Ten Pin Alley, Quivey's Grove restaurant, Felly's Flowers and Garden, and the Bavaria Sausage deli.

ORF is in close proximity to a variety of outdoor amenities including, several public parks, the Quarry Ridge Recreation Area, and the Military Ridge State Trail.

The location also offers convenient access to the Madison Metro Transit bus system, with the "D" line stop a short walk away. This bus line leads to the Capitol Square, giving resident's access to the Madison Bus Rapid Transit system, Middleton, Verona, Sun Prairie, and Monona.

The bus line also provides residents access to the Fitchburg Senior Center and Library, located on the same campus. These public amenities offer a wide array of social, wellness, and support programs tailored to older adults.

This central and well-connected location makes ORF an ideal setting for senior housing—offering both convenience and connection to the broader Fitchburg community.

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

Type of Amenities & Services	**Name of Facility**	**Distance from Site**
Full-Service Grocery Store	Hy-Vee	.26
Public Elementary School	Chavez Elementary School	.87
Public Middle School	Savanna Oaks Middle School	1.52
Public High School	Verona High School	3.98
Job-Training Facility, Community College, or Continuing Education Programs	IUPAT Training Center	.65
Childcare	Rise High Learning Academy	.43
Public Library	Fitchburg Public Library	1.55
Neighborhood, Community, or Senior Center	Fitchburg Community Center	2.94
Full Service Medical Clinic or Hospital	UW Health Fitchburg	2.15
Pharmacy	CVS	.19
Public Park or Hiking/Biking Trails	Quarry Cove Park	.10
Banking	UW Credit Union	.38
Retail	Target	.20
Other (list the amenities)		

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

Oak Ridge Fitchburg is a convenient location due to it's close proximity to everyday amenities. ORF resident's are a short walk away from the a Madison Metro Transit bus stop. Resident's will be able to access the “D” bus line with a bus circulating through every 30 minutes on the weekdays, and reoccurring stops on the weekends.

This bus line leads to the Capitol Square, giving resident’s access to the Madison Bus Rapid Transit system, Middleton, Verona, Sun Prairie, and Monona.

Resident’s who utilize a bike or do not have a car will not have a problem accessing everyday amenities. As outlined in Section “M” most everyday amenities are short walk away in the Orchard Pointe Shopping Center less than 1000’ away.

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

Tenants of Oak Ridge Fitchburg will have multiple convenient ways to access property management staff to ensure their needs are addressed efficiently and effectively. An on-site management office will be available during regular business hours, Monday through Friday, for in-person visits. For residents with mobility challenges, staff will be available to schedule in-unit visits as needed.

Phone access will be provided during business hours, with an emergency line available for after-hours urgent issues. For non-urgent matters, residents can also communicate via email.

Additionally, a dedicated online tenant portal will be available, allowing residents to submit maintenance requests, pay rent, and communicate with management at any time.

These multiple points of access are designed to ensure that all residents—regardless of their preferred method of communication or level of mobility—can easily connect with property management for timely assistance and support.

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

Oak Ridge Fitchburg will prioritize housing stability by implementing proactive alternatives to eviction both before and after any legal filings. Property management will engage residents early, offering payment plans, individualized repayment agreements, and direct outreach at the first sign of financial hardship. Through partnerships with local organizations such as Dane County Human Services and Lutheran Social Services, residents will have access to financial counseling, emergency rental assistance, and other supportive services.

If an eviction filing becomes unavoidable, the development will continue to work toward resolution without displacement. Every case will undergo a review, with management collaborating with the residents or case managers to pursue all available alternatives before finalizing an eviction.

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

The policy of the development is designed to ensure that all procedures related to affordable senior housing are accessible to everyone. The development will conduct a thorough needs assessment to identify and address the specific requirements of seniors, including those with physical, sensory, and language barriers. All facilities will be designed to meet ADA standards, featuring accessible units and common areas with ramps, wide doorways, and other necessary modifications. The development will implement outreach strategies that include multilingual materials and translation services to ensure that information about the housing project is available to non-English speakers. Continuous feedback will be solicited from residents to ensure that services remain accessible and effective. The development will make necessary adjustments based on this feedback. This policy aims to create an environment where all seniors can access and benefit from the housing project equitably.

PROJECT APPROACH

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

Oak Ridge Fitchburg is committed to creating more than just affordable senior housing, it is a community building with strong support systems in place to promote resident stability, wellness, and long-term success. JTK has partnered with the LSS to submit soft fund applications and to participate in the project ownership. JTK and LSS have partnered to submit a FHLBC AHP grant application in which LSS will hold a 51% ownership interest in the managing member entity.
LSS will also provide support services to the supportive units as outlined in Section E. LSS is one of the oldest and most respected nonprofit supportive service providers in the Midwest. They have years of experience withing with the Dane County HSC and providing referrals from the CE list. The attached MOU provides additional details on LSS' services provided and their referral process.

Through this partnership, LSS will provide a comprehensive array of supportive services tailored to meet the needs of ORF residents, particularly those identified as part of the targeted populations listed in sections "W" and "AA" of the application. A dedicated LSS Service Coordinator will commute on-site, acting as a direct connection between residents and available supportive, and advocacy services in the surrounding community. The goal of this coordination is to promote independence, housing stability, and long-term well-being for all residents.
Supportive services will begin with a voluntary intake assessment conducted by the Service Coordinator. Based on this assessment, individualized case management plans will be developed, potentially including referrals to external resources such as veterans' services or disability support. The Service Coordinator will also facilitate regular programming, including one-on-one sessions with residents and group workshops on topics such as financial literacy, personal development, employment or educational resources, and wellness initiatives designed to help residents overcome barriers and thrive in their homes.

LSS will maintain an active presence at ORF, operating from a space provided by JT Klein. Residents will be introduced to available services during their orientation and will receive ongoing updates through newsletters, calendars, and clearly posted flyers near mailboxes and building entry points. To support continued communication, LSS and the ORF property management team will implement a coordinated plan that includes bi-monthly check-in meetings. These sessions will focus on unit turnover, eviction prevention, property updates, and other resident needs. Additionally, an annual community meeting will bring together tenants, management, and LSS staff to discuss ongoing needs and opportunities for improvement.

LSS has assigned a full-time staff member to oversee supportive services across all JT Klein properties, ensuring consistent, high-quality delivery. This longstanding relationship has proven effective across the JT Klein portfolio and will continue to be a key factor in the success of ORF.

ORF will also partner with the Dane County Veterans Service Office (CVSO) to provide housing support and referrals for eligible veterans. During the initial lease-up period, the management team will work closely with CVSO to help place veterans into supportive housing units or other affordable units they qualify for. Once the building is fully occupied, a waiting list will be maintained for future veteran placements. The development will also make CVSO contact information and materials from the Dane County Aging and Disability Resource Center readily available in common areas for resident use.

Through this coordinated network of supportive services and strategic partnerships, ORF will create a safe, stable, and welcoming community where residents—particularly those facing unique challenges—can access the resources and support they need to lead healthy, independent lives.

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

Yes	No
☒	☐

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

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

	Yes	No	
All REQUIRED FOR FUNDING	☒	☐	Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months
	☒	☐	Lack of housing history
	☒	☐	Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located.
	☒	☐	Wisconsin Circuit Court Access records
	☒	☐	Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water).
	☒	☐	Credit score

	☒	☐	Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations.
	☒	☐	Owing money to a prior landlord or negative rent payment history if the tenant's housing and utility costs were more than 50% of their monthly income.
	☒	☐	Owing money to a prior landlord or negative rent or utility payment history if applicant does one of the following: (1) establishes a regular record of repayment of the obligation; 2) signs up for automatic payment of rent to the housing provider; or (3) obtains a representative payee.
	☒	☐	Any eviction filing if meets any of the following: (1) eviction filing was dismissed or resulted in a judgement in favor of the applicant; (2) eviction filing which was settled with no judgement or write of recovery issued (e.g. stipulated dismissal); or (3) eviction filing that resulted in judgement for the landlord more than two years before the applicant submits the application.
	☒	☐	Criminal activity, except: (i) a criminal conviction within the last two years for violent criminal activity or drug related criminal activity resulting in a criminal conviction, and (ii) if the program or project is federally assisted, criminal activity for which federal law currently requires denial. (*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.)

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

Yes	No
☒	☐

1.	Prior to a denial based on a criminal record, the housing provider shall provide the applicant access to a copy of the criminal record at least five days prior to the issuance of denial and an opportunity to dispute the accuracy and relevance of the report, which is already required of HUD assisted housing providers. See 24 C.F.R. § 982.553(d), which applies to public housing agencies administering the section 8 rent assistance program.
2.	Prior to a denial based on a criminal record, the housing provider shall provide the applicant the opportunity to exclude the culpable family member as a condition of admission of the remaining family members.
3.	Prior to a denial decision, the housing provider is encouraged to meet with the applicant to review their application and make an individualized determination of their eligibility, considering: (a) factors identified in the provider's own screening policies, (b) if applicable, federal regulations, and (c) whether the applicant has a disability that relates to concerns with their eligibility and an exception to the admissions rules, policies, practices, and services is necessary as a reasonable accommodation of the applicant's disability. In making a denial decision, the housing provider shall consider all relevant circumstances such as the seriousness of the case, the extent of participation or culpability of individual family members, mitigating circumstances related to the disability of a family

	member, and the effects of denial on other family members who were not involved in the action or failure.
4.	The property manager will base any denial on sufficient evidence. An arrest record or police incident report is not sufficient evidence. Uncorroborated hearsay is not sufficient evidence.
5.	Denial notices shall include the following: a) The reason for denial with details sufficient for the applicant to prepare a defense, including: i) The action or inaction forming the basis for the denial, ii) Who participated in the action or inaction, iii) When the action or inaction was committed, and iv) The source(s) of information relied upon for the action or inaction. b) Notice of the applicant's right to a copy of their application file, which shall include all evidence upon which the denial decision was based. c) Notice of the applicant's right to copies of the property manager's screening criteria. d) Notice of the right to request an in-person appeal meeting on the denial decision by making a written request for a hearing within 45 days. The housing provider is not required to hold the unit open while the appeal is pending. e) Notice of the right to have an advocate present at the in-person appeal meeting and of the right to be represented by an attorney or other representative. f) Notice of the right to present evidence in support of their application, including, but not limited to evidence related to the applicant's completion or participation in a rehabilitation program, behavioral health treatment, or other supportive services.
6.	If the applicant requests an in-person appeal meeting, the hearing will be conducted by a person who was not involved in or consulted in making the decision to deny the application nor a subordinate of such a person so involved.
7.	The in-person appeal meeting shall be scheduled within ten working days of the request, unless the applicant requests a later date.
8.	A written decision on the application shall be provided to the applicant within ten working days after the in-person appeal meeting.

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

Yes	No
☒	☐

a.	**Security Deposits.** The amount of a security deposit shall not be more than one month's rent.
b.	**Late Fees and Other Fees.** Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant's portion of the monthly rent.
c.	**All other fees.** All other fees must be directly related to the cost for a specific amenity or service provided to the tenant and comply with all applicable laws. Non-essential services must be transparently identified, and allow tenant to opt out of services if tenant chooses. Junk fees are prohibited and defined as unnecessary, deceptive, or poorly disclosed charges not tied to a legitimate service or cost, and that place an undue burden on tenants. (For example, application fees above $25 dollars pursuant to Wis. Stat. § 704.085, compounding fees, penalty fees, eviction filing fees, attorney's fees, processing fees, convenience fees for

	payment, pest control fees, insurance fees, administrative fees or any fees that encompass basic tenancy service.)
d.	**Rights of Youth to Access Common Spaces.** Youth under the age of 18 are allow to use and enjoy common areas without supervision. This does not preclude reasonable rules in ensure the safety of children and youth.
e.	**Written Notice for Termination of Tenancy.** Landlord or landlord's agent must serve written notice upon the tenant specifying the grounds (e.g., the dates of relevant event/s, names of parties, reasoning, source of information and relevant documents) for the action at least 30 days before the termination of tenancy, unless shorter timeframe is required by federal funding. Termination for imminent threat of serious physical harm under WI Statute § 704.16(3) and criminal activity under WI Statute § 704.17(3m) are exempted from this requirement.
f.	**Good Cause for Termination.** A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined in include the following: (i) a serious violation of the lease; (ii) repeated minor violations of the lease; or (iii) a refusal to re-certify program eligibility. Repeated means a pattern of minor violations, not isolated incidents. Termination notices and procedures shall comply with Chapter 704 of Wisconsin Statutes and federal law, when applicable. Written notice is required for non-renewal and shall include the specific grounds for non-renewal and the right of the tenant to request a meeting to discuss the non-renewal with the landlord or landlord's property management agent within fourteen (14) days of the notice. If requested, the landlord or property management agent will meet with the tenant to discuss the non-renewal, allow the tenant to respond to the alleged grounds for non-renewal, and pursue a mutually acceptable resolution.
g.	**Reasonable Guest Rules.** Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not limited to the following: (1) Prior authorization of guests by the property management, unless the guest is staying for an extended period of time (e.g. more than 2 weeks); (2) Prohibition on overnight guests; (3) Requiring that the resident be with the guest at all times on the property. (4) Requiring guests to show ID unless requested by the tenant. (5) Subjecting caregivers, whether caring for a child or children, or an adult with disabilities, to limitations on the number of days for guests. Landlord may ban a person who is not a tenant from the rental premises if the person has committed violent criminal activity or drug related criminal activity at rental premises. No person shall be banned from the rental premises without the consent of the tenant unless the following have taken place: (1) A notice of the ban is issued to the tenant stating the: (a) name of the person banned, (b) grounds for the ban including, (i) the specific facts detailing the activity resulting in the ban; (ii) the source of the information relied upon in making the ban decision; and (iii) a copy of any criminal record reviewed when making the ban decision; and (c) the right of the tenant to have a meeting to dispute the proposed ban, discuss alternatives to the ban, and address any unintended consequences of the proposed ban. (2) If requested, a hearing on the ban has taken place to provide the tenant an opportunity to dispute the proposed ban, discuss alternatives of the ban, and address any unintended consequences of the proposed ban. A tenant may not invite or allow a banned person as a guest on the premises, provided the Landlord has followed the proper procedure and given notice to Tenant as set forth herein. A tenant who violates the guest policy may be given a written warning detailing the facts of the alleged violation. The written warning shall detail the violation, and warn the tenant that repeated violations may result in termination of tenancy. Tenants that repeatedly violate the guest policy, (e.g. three (3) or more violations within a twelve (12) month period) may be issued a notice of termination in accordance with state and federal law.

	Nothing in this policy limits a person's right to pursue a civil order for protection against another individual.
h.	**Parking Policies.** Parking policies and practices must comply with applicable laws. Vehicles shall not be towed to a location that is more than 6 miles from the rental premises, unless there is not a towing company with a tow location available within 6 miles.

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

JT Klein Company is committed to supporting Dane County's Housing First goals and will continue to actively pursue strategies that contribute to ending homelessness in the region. As part of this ongoing commitment, JT Klein is prepared to work in partnership with the Dane County Homeless Services Consortium (HSC) to help provide stable housing solutions for individuals and families experiencing homelessness. At ORF, JT Klein will set aside 16 units targeting individuals or families receiving case management services through the HSC's Community-Wide Priority List for Housing. To ensure coordinated placement and support, JT Klein will enter into an agreement with Lutheran Social Services (LSS) to work collaboratively with HSC. These partners will help identify eligible tenants, coordinate placement, and provide ongoing case management to ensure housing stability.

In line with best practices and the project's commitment to prioritizing vulnerable populations, the 16 supportive housing units will be held open exclusively for individuals on the HSC list for a minimum of 30 days during the initial lease-up period. During this time, JT Klein and its service partners—LSS and the Dane County Veterans Service Office (CVSO)—will conduct targeted outreach to inform eligible individuals of the opportunity and assist with the application process.

During the 30-day exclusive period, the supportive service providers will guide applicants through the application, income verification, and screening processes. If a qualifying applicant is actively working with the service provider to complete their application, JT Klein will provide flexibility and may continue to hold a unit open beyond the 30-day period to accommodate the process.

Following this exclusive leasing window, JT Klein will continue to prioritize members of the targeted populations but will begin accepting applications from other income-eligible residents. Throughout the life of the project, JT Klein will maintain strong partnerships with LSS and CVSO to ensure that these supportive units are filled by those who need them most and that residents continue to receive the services necessary to maintain stable, independent housing.

Total # of Project Units	**# of Units Targeted to Individuals/Families experiencing homelessness**	**% of Units Targeted to Individuals/Families experiencing homelessness**
80	16	20%

Name of Supportive Services Provider for Coordinated Entry referrals?

Lutheran Social Services of Wisconsin & Upper MI

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

Yes

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

Property management staff will work closely with supportive service providers, including Lutheran Social Services (LSS) and the Dane County Veterans Service Office (CVSO) to ensure that CE applicants receive individualized assistance. This includes setting aside time for in-person or phone-based support to walk applicants through the steps of the process, answering questions, and helping applicants gather the required income, identification, and housing history documentation.

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

JTK will work with the property management team to create a Tenant Selection Plan (TSP) outlining the application and screening project for ORF. Attached to this application is a sample copy of a TSP created for a similar JTK project that received a Dance County AHDF award in a prior year. ORF has agreed to all screening criterias' outlined in Sections "P", "S", "T", "U", & "V". These criterias will remove additional barriers that are not required under the compliance of the Section 42 LIHTC program. ORF is committed to providing equitable access to housing while maintaining consistent screening practices that align with all local, state, and federal Fair Housing guidelines. While the development team recognizes the unique challenges faced by individuals experiencing homelessness, the project must ensure that all applicants are screened using the same objective criteria to remain compliant with Fair Housing law.

SUPPORTIVE SERVICES:

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

Supportive Services Partner:	Lutheran Social Services of Wisconsin & Upper Michigan		
Total annual budget for supportive services at project:	$80,000.00		
Amount of annual funding **project and/or developer** will provide directly to supportive services at project:	$80,000.00		
Full-Time Equivalent position(s) dedicated to providing services at project:	0.6		
Number of estimated weekly on-site hours of supportive services provided by identified partner:	24 Hours		
Project will provide on-site services in a dedicated space:	☒ Yes	☐	No

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

Supportive services will be provided by: 1. Lutheran Social Services 2. Dane County Veterans Service Office (Referrals)

1. Lutheran Social Services LSS is one of the oldest and most experienced service providers in the Midwest. All residents, including those in the supportive housing units, will have access to a Lutheran Social Services Service Coordinator, who will help to address their challenges and arrange services to they may learn the skills necessary to develop and maintain a healthy, stable lifestyle. LSS will focus on assessments and referrals to resources. Specific services to be offered include:
• Completion of an intake assessment by the Service Coordinator. It is understood and agreed that the resident has to voluntarily agree to participation in the process.
• Development of a case management plan. This plan may include referral to other resources, including Veteran or disability resources specifically if applicable.
• The Service Coordinator will facilitate programming and supportive services for the project. This will be done through meetings between tenants and management to discuss any issues or concerns, as well as the scheduling of regular educational workshops or presentations.

There will be an emphasis on presentations designed to assist residents in overcoming barriers as identified on the tenant assessments. Potential sessions could include, self-improvement, employment or educational opportunities, and financial management. LSS will establish a communication plan with the ORF property management team prior to the start of marketing, which implements a partnership approach to supporting the tenants at both developments. It is important for the tenants at ORF to view LSS and property management as a team, working together to provide a safe and thriving community. LSS and the property management team will implement bi-weekly check in calls or in person meetings to work discuss property updates, unit turnover, eviction prevention, and overall tenant or property needs. Additionally, facilitation of an annual meeting where tenants, management and the service provider can meet to discuss any issues or concerns. A full time LSS service coordinator has already been established and funded through the JTK portfolio and will be covering ORF. This case manager will be able to coordinate support for residents as needed and will be available to travel to the property to meet with residents directly.

2. Dane County Veterans Service Office (Referrals) The Dane County Veterans Service Office (CVSO) works directly with local veterans to help them access state/federal benefits and providing them with referrals to resources such as affordable housing. The management teams will work directly with CVSO during the lease up period to place veterans into supportive service units or other affordable units the veterans would qualify for. After lease up, a waiting list will be established to help place future veterans. Both properties will display the CVSO contact information as well as materials and brochures of the Dane County Aging and Disability Resource Center.

Z. Complete the table for supportive units proposed:

	# of Bedrooms					
% of County Median Income (CMI)	**Total # of Units**	**# of Studios**	**# of 1 BRs**	**# of 2 BRs**	**# of 3 BRs**	**# of 4+ BRs**
≤30%	16	0	13	3	0	0
40%	0	0	0	0	0	0
50%	0	0	0	0	0	0
60%	0	0	0	0	0	0

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

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

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

NA

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

Supportive services will be tailored specifically for the supportive housing units, but will be available for any resident of ORF to participate in. Please see the attached Letter and signed MOU from LSS going into further detail on their scope of services.

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

Engagement begins with a comprehensive intake assessment and the development of a personalized Housing Stability Plan outlining goals, risk factors, and steps to maintain housing. LSS maintains open communication with property management to address potential lease violations early, engaging tenants in non-punitive, solution-focused conversations. When needed, the provider will implement corrective action plans and connect residents to supportive services addressing behavioral health, employment, food access, and more.

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

Staff participate in a comprehensive onboarding process within their first 30 days, which includes foundational instruction in case management basics, progressive engagement strategies, and community resource navigation. This initial training equips staff with the tools they need to assess resident needs, build trust, and support housing retention effectively. Onboarding also covers Oakbrook Corporation’s policies and procedures to ensure close alignment between supportive services and property management operations. Monthly team meetings include ongoing skill refreshers, peer case reviews, and updates on local community resources. This structured, multi-faceted training approach anchored by a strong understanding of Fair Housing principles ensures Oakbrook’s staff are fully equipped to foster inclusive, stable, and respectful housing environments for all residents.

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

We have a designated service coordinator with an office out of our Oak Ridge at University Park building in Madison. This office is what LSS is operating out of in this region and will be able to meet residents at any property in this area. LSS will hold reoccuring onsite meetings in a dedicated space at ORF. Depending on the level of care needed, the LSS team may schedule additional meetings in the tenant's unit or an equivalent safe space, as needed.
Tenant's will also be able to communicate with the supportive service provider via phone and/or email. Prior to moving in, LSS' materials and contact information will be available for future tenant. Any resident at ORF will be able to schedule an in person meeting at the LSS satelite office within Oak Ridge University Park as well.

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:

To ensure residents are aware of these services, we will distribute informational flyers, send regular email updates, and post announcements in common areas. Additionally, we will host informational sessions with representatives from Lutheran Social Services to provide further details.

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

Upon move-in, each resident at ORF will receive a packet outlining the supportive services available to them and the contact information for the supportive service coordinator. During the lease-up phase, LSS will begin engagement by hosting on-site informational sessions to help residents gain an understanding of available services and how to access them.
Following the lease-up phase, LSS will develop an ongoing Supportive Services Plan tailored to the needs of the residents, ensuring that appropriate services are accessible and responsive. As part of this plan, LSS will implement a regular schedule of on-site meetings to support the introduction, coordination, and ongoing management of services for residents.
JT Klein will provide a dedicated meeting space at ORF for LSS and residents to hold quarterly meetings. In addition to scheduled meetings, residents will also be able to connect with the LSS coordinator by appointment, during regular office hours, or through phone or email communication, ensuring accessibility and consistency in support.

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

Lutheran Social Services will identify and collaborate with other community service providers through a comprehensive outreach strategy. This includes conducting community needs assessments, attending local networking events, and organizing regular meetings with other organizations and stakeholders. LSS will collaborate on joint programs and workshops. These efforts will create a comprehensive support network to address the diverse needs of residents in the target area.

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

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

ORF will establish a Supportive Service Reserve Fund upon completion of the project and final equity installment. This reserve will be funded in the amount of $1,200,000 and will be specficially dedicated to supportive services provided at ORF. Each month or each quarter, the supportive service provider will submit an itemized invoice to the property to be approved and paid within 30 days.

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

Having developed and managed HUD subsidized housing since 1983 LSS entered the competitive work of tax credit housing in 2014. Since that time they have been fortunate enough to be partners in eleven (12) awards, including:
1. Pebble Ridge - Madison, a 50 unit development in parnership with Herman & Kittle Properties (HKP)
2. Jackson Square - Oshkosh, a 54 unit development in partnership with HKP
3. Croft Place - New Richmond, a 51 unit development in partnership with HKP
4. Haymarket Lofts - Milwaukee, a 72 unit development in partnership with HKP
5. Tennyson Ridge - Madison, a 72 unit development in partnership with TW Sather and WHPC
6. Gold Medal Lofts - Racine, a 79 unit development in partnership with J. Jeffers & Co. (Jeffers)
7. Horlick Lofts - Racine, a 77 unit development currently under construction, in partnership with Jeffers
8. Candice Lofts - Jefferson, a 36 unit development in partnership with Gorman & Co (Gorman)
9. Union Corners - Madison, a 59 unit development in partnership with Gorman
10. Valor on Washington - Madison, a 59 unit developmemt currently under construction, in partnership with Gorman
11. Thirteen31 Apartments - Milwaukee, an 89 unit development.
12. Autumn Ridge I - Middleton, a 55 unit development in partnership with JT Klein Company, Inc.

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

JT Klein Company, Inc. is partnering with Lutheran Social Services (LSS) to provide a variety of supportive services to the targeted residents of ORF. Tenants will have access to the help they need through an LSS Service Coordinator who will help to address their specific challenges, and arrange services, that they may learn the skills necessary to develop and maintain a healthy, stable lifestyle. A designated Service Coordinator will be responsible for linking the target population at the site with supportive, medical or advocacy services in the general community for which they are entitled, with a desired outcome of keeping them independent in their units. LSS will establish a communication plan with the property management team prior to the start of marketing, which implements a partnership approach to supporting the tenants at each building. It is important for the tenants to view LSS and the property management as a team, working together to provide a safe and thriving community. LSS and the property management team will implement bi-weekly check in calls or in person meetings to discuss property updates, unit turnover, eviction prevention, and overall tenant or property needs. Additionally, facilitation of an annual meeting where tenants, management and the service provider can meet to discuss any issues or concerns.

EXPERIENCE AND QUALIFICATIONS

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

Developer- JT Klein Company:
In November 2014, Jacob T. Klein formed JT Klein Company, Inc. with the ambition to develop workforce, affordable senior, and market rate housing. Jacob’s role includes site identification, market analysis, securing entitlements, sourcing debt and equity financing and construction project management. Since 2004 Jacob has developed over 1,020 units of housing in Wisconsin.

Jacob T. Klein- President/Founder Mr. Klein is responsible for project development, leading all facets of the development process, including site identification and acquisition, city approvals, financial layering, tax credit approval, construction and lease-up, financing -- identifying various forms of soft cost subsidies, TIF analysis, construction and long-term debt financing as well as Tax Credit Equity. Mr. Klein is experienced in developing and performing construction management duties for independent senior apartments, assisted living and memory care as well as market rate and affordable general occupancy apartments. JT Klein Company has been awarded eleven LIHTC awards from WHEDA to support the development of 817 new affordable apartment units in Dane County. JT Klein Company was recognized as one of 2024's Top 50 affordable housing developers in the nation by Affordable Housing Finance Magazine.

Kevin O’Donnell- Director of Development Kevin’s primary responsibilities with JT Klein include sourcing new projects and managing all aspects of the development cycle. He manages relationships with city officials, landowners, financial partners, attorneys, contractors, and community partners to help grow the affordable footprint in Wisconsin. Prior to JT Klein, Kevin developed his experience as an Asset Manager for a portfolio of properties in the Midwest. His prior experiences in asset management and property management provide him with a complete understanding of the functions that each development needs to ensure it is successful. Kevin has developed & managed over 2,800 LIHTC & Market units through new construction and the renovation process.

Co-Developer: Lutheran Social Services of Wisconsin and Upper Michigan (LSS)
Since 1989, LSS's service coordination program has facilitated a variety of supportive services within multi-family residential communities. LSS's program is designed to promote and support self-sufficiency and independence for older adults, individuals living with disabilities, and others by connecting them with necessary resources and services. In 2019 alone, LSS offered onsite Service Coordination in safe, affordable and accessible homes for 2,697 residents. Over 93% of those residents stated they remained or became connected to their community. LSS offers a variety of Housing programs to fulfill the vision of healthy communities for all ages, needs, and incomes. - HUD Subsidized Housing: LSS owns and manages more than 30 subsidized communities, totalling more that 425 units. - Market Rate Housing:

LSS manages Eastridge Estates, a 64 units independent living community for adults 55 and older. - Services to Persons experiencing Homelessness: LSS is involved in a variety of services to bring individuals and families our of homelessness ana into permanency in housing through Tenant Based Rental Assistance, Housing First, and Case Management Services - Afforable Housing/Tax Credit Empowerment Services: The LIHTC Program highlights LSS's commitment to remove barriers by providing quality, afforable rental housing. LSS's development partners bring the experience and resources necessary to rejuvenate existing buildings as well as develop new apartments and mixed use spaces. LSS brings development and supportive service experience as well as the ability to secure soft funds to better ensure award and ultimate success of the development. -Service Coordination: LSS service coordinators embody the core value; believe in the infinite worth of every person. Based on resident interests and needs, we offer information and referral in the following empowerment areas: -- Child and Adult Education -- Finacial Literacy -- Employment Services -- Health and Government Benefits

Co-Developer: DA Development LLC
DA Development is a certified Minority Business Enterprise development company specializing in low-income house tax credit projects. Since formation in 2020, DA Development has been the co-developer on 6 affordable housing developments that successfully WHEDA tax credit awards. Founder and president Danny Afable has been working in real estate, specifically multi-family rental housing, since 2010.

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

JT Klein has partnered with Oakbrook Corporation on all current and future developments within it's portfolio. Oakbrook's multifamily property management group has extensive experience managing apartment communities of all types and sizes, including urban mixed-use properties. These properties consist of senior or family communities which operate as market rate properties or were financed with Section 42 Low Income Housing Tax Credits or under various other state and federal programs. Oakbrook Corporation currently employs over 310 individuals and manages over 7,900 apartments in 89 different properties in Wisconsin, Iowa and Illinois, and 50 commercial properties in the Madison area totaling over 1,700,000 square feet. With state-of-the-art software products, Oakbrook is equipped to provide a range of financial reports to property owners and other direct real time reports to tenants. These reports include balance sheets, income statements (with comparisons of actual to budget), sources and uses of funds statements, investor reports, occupancy and marketing reports, state and federal compliance reports, operating budgets which include proposed capital improvements. Oakbrook provides tenant communications that include real time work order status reports, leases with electronic signatures, online rental payments and rental applications.

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

NA

PROJECT FINANCING

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

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

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

SOURCE	AMOUNT
First Mortgage	$4,900,000
Dane Workforce Fund Loan	$1,600,000
Dane County AHDF	$8,000,000
Deferred Developer Fee	$1,160,984
Tax Credit Proceeds	$9,839,016
TOTAL	25,500,000

USES	AMOUNT
Land	$1,300,000
Site Work	$300,000
Construction	17,325,000
Contingency	$866,250
Architect/Engineering	$334,000
Interim Construction	$1,000,000
Perminant Financing	$265,000
Soft Costs/Syndication	$347,073
Developer Fee & Overhead	$2,000,000
Reserve/Lease Up SSP Reserve	$562,677 $1,200,000
TOTAL	25,500,000

NN. Which of the identified sources have been secured?

Oak Ridge Fitchburg successfully received a competitive WHEDA 2025 9% tax credit award on 5/30/25.

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

Oak Ridge Fitchburg successfully received a competitive WHEDA 2025 9% tax credit award on 5/30/25.

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

We are in an unprecedented time for construction pricing and material supply chain. Since the 2020 Covid pandemic, construction costs have risen between 10-15% each year, if not more. Rising construction costs paired with rising interest rates have made affordable housing even harder to build. In April of 2024, JT Klein completed the construction bidding process of two other projects, University Park Commons II & The West End. Since that time, construction costs have continued to rise. ORF will be an incredible project that will provide a substantial amount of affordable bedrooms across a variety of AMIs and unit sizes. We are requesting $8,000,000 of Dane County AHDF to help offset the rising construction costs. This development contains 112 affordable bedrooms, which equals a request of approximately $71,430 of funding per bedroom. ORF is in the process of receiving final financing commitments to make it a shovel ready project. If awarded, this development will be able to utilize the funds immediately to move this much needed project forward.

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

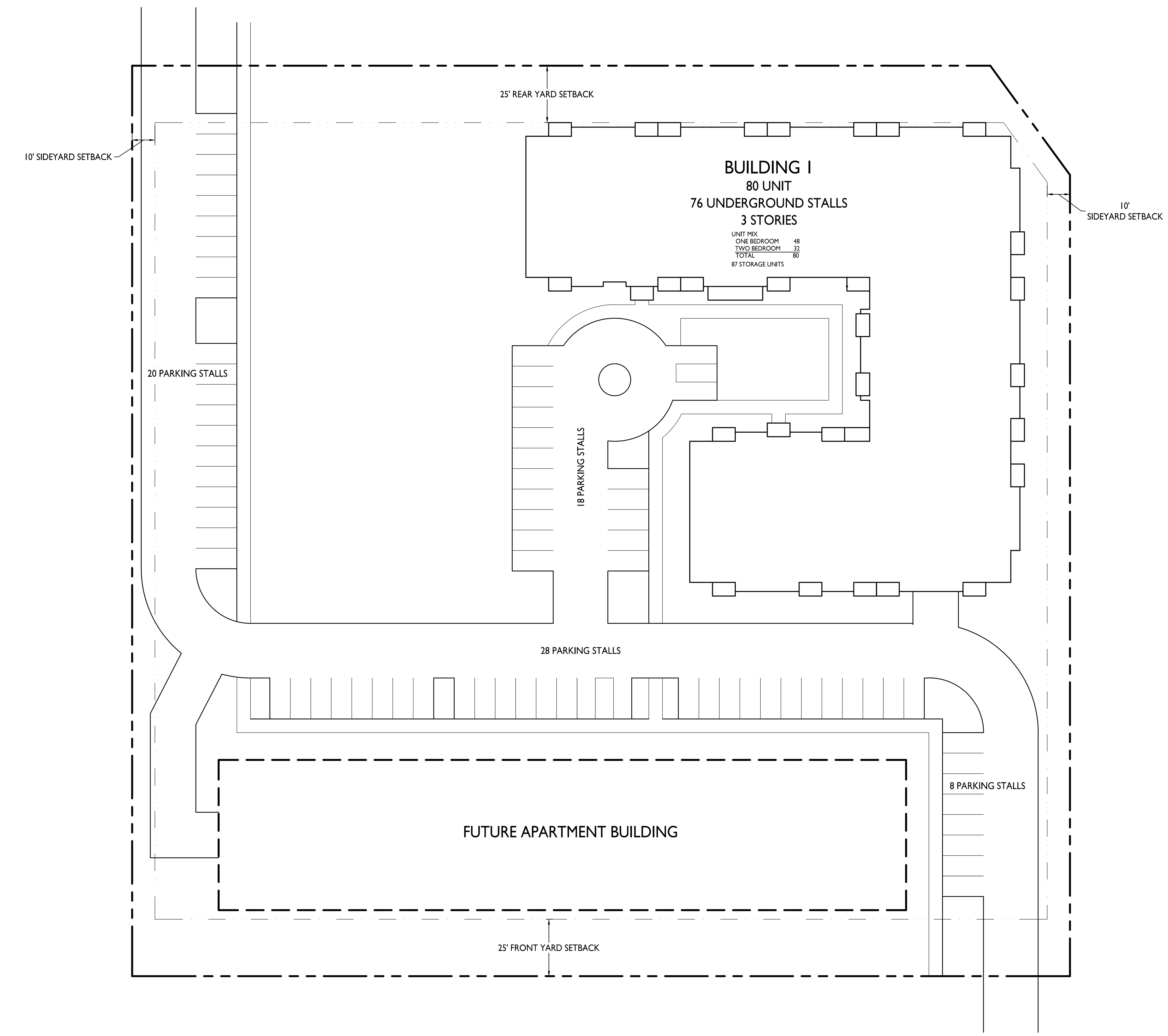
OPERATING BUDGET

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

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

SITE DEVELOPMENT DATA:

ZONING	B-G BUSINESS GENERAL
GROSS BUILDING AREA	112,000 S.F. (INCLUDES BASEMENT)
RESIDENTIAL AREA	84,000 S.F.



1 CA101 ARCHITECTURAL SITE PLAN
1" = 30'-0"

GRAPHIC SCALE
0 30 60 90
1 INCH = 30 FT (24X36 SHEET)

kba
knothe • bruce
ARCHITECTS
Phone: 608.836.3690
8401 Greenway Blvd., Suite 900
Middleton, WI 53562

ISSUED
WHEDA Submittal - March 20, 2025

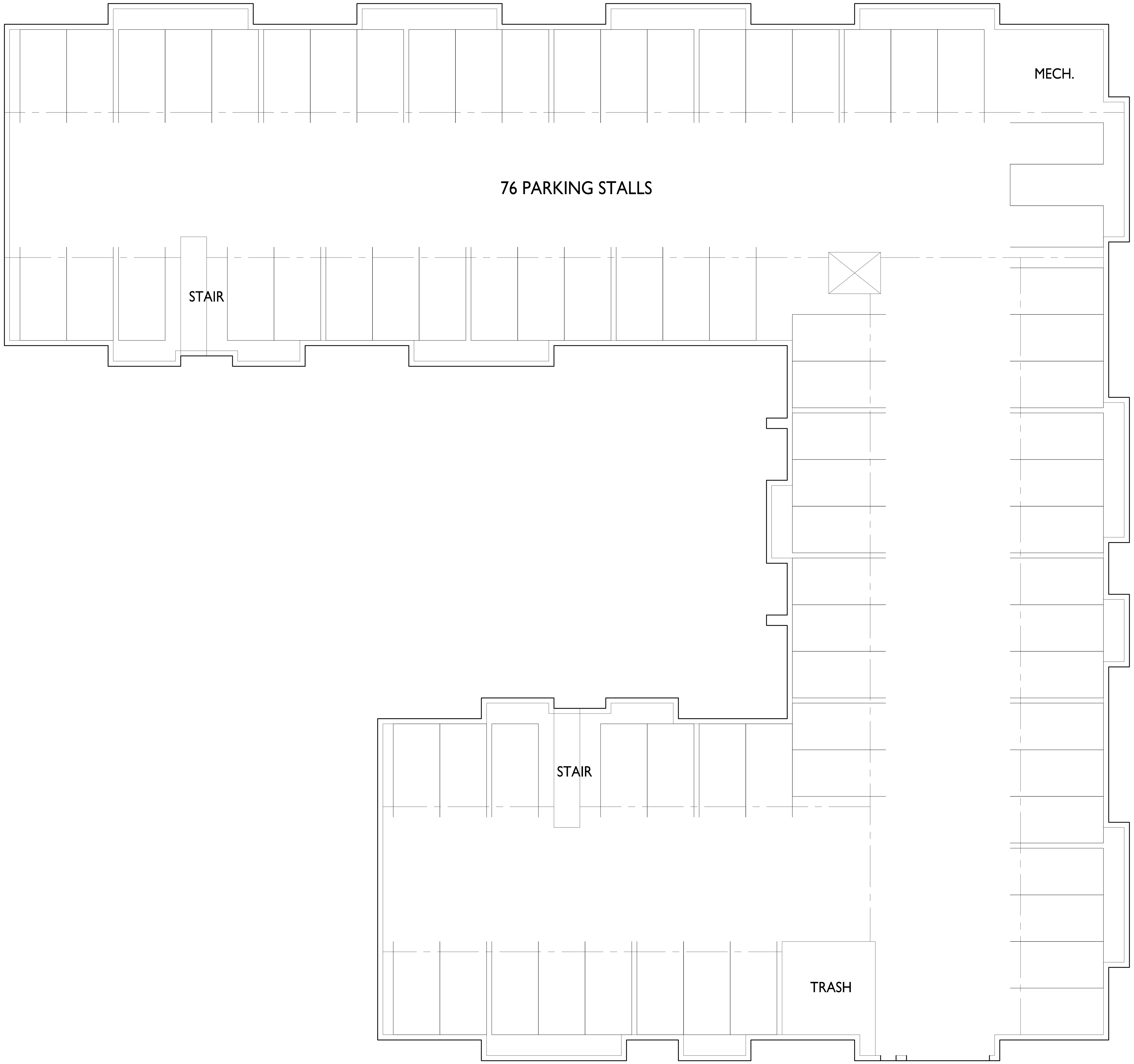
PROJECT TITLE
Multi-Family Development

Nesbitt Rd.
Fitchburg, WI

SHEET TITLE
ARCHITECTURAL SITE PLAN

SHEET NUMBER
CA101

PROJECT NO. 2448



1 A-1.0 BASEMENT FLOOR PLAN
3/32" = 1'-0"

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Phone: 608.836.3690
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Middleton, WI 53562

ISSUED
Issued - May 5, 2025

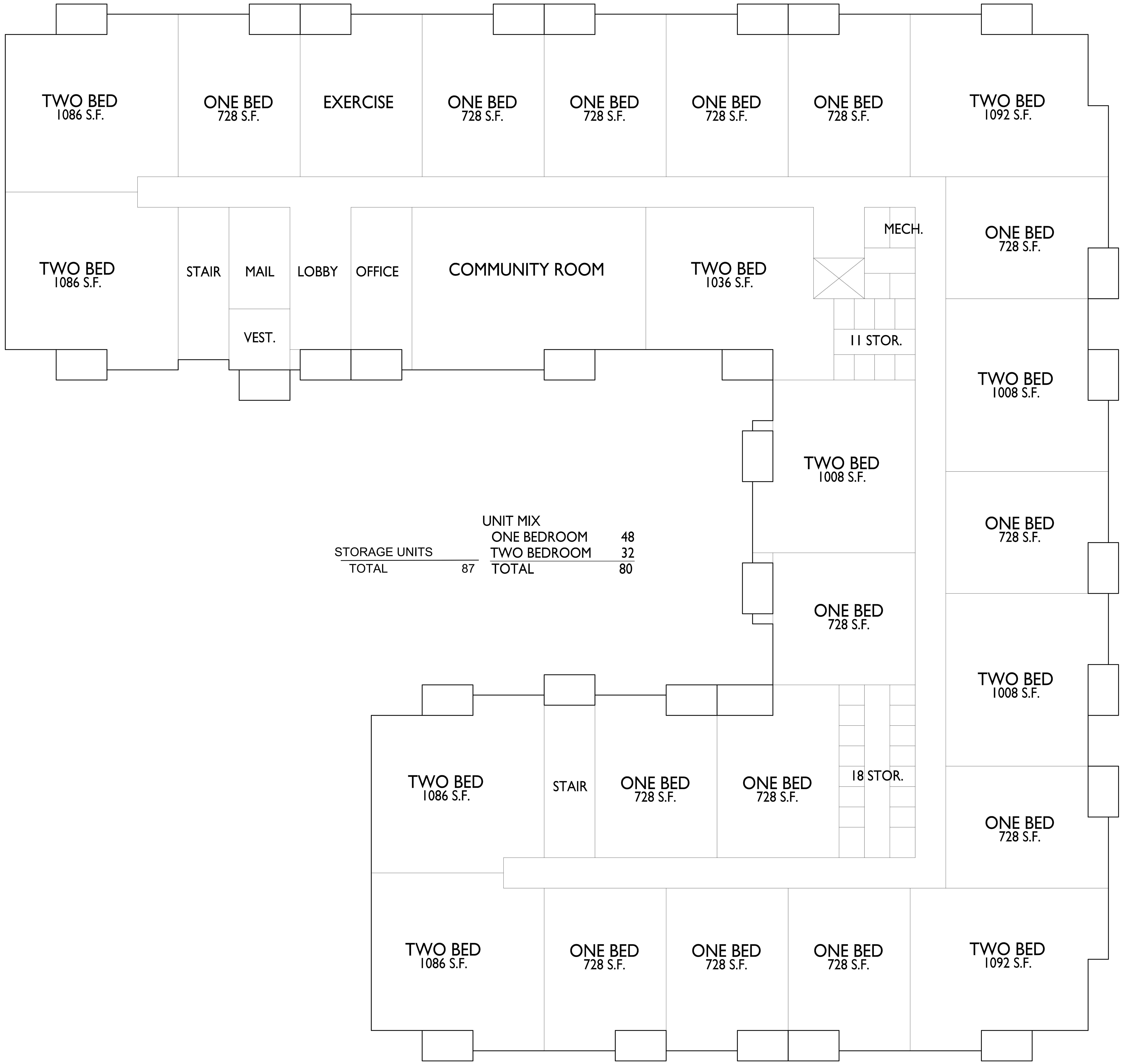
PROJECT TITLE
Multi-Family Development

Nesbitt Rd.
Fitchburg, WI

SHEET TITLE
Basement Floor Plan

SHEET NUMBER
A-1.0

PROJECT NO. 2448



1
A-1.1
FIRST FLOOR PLAN
3/32" = 1'-0"

knothe • bruce
ARCHITECTS
Phone: 608.836.3690
8401 Greenway Blvd., Suite 900
Middleton, WI 53562

ISSUED
Issued - May 5, 2025

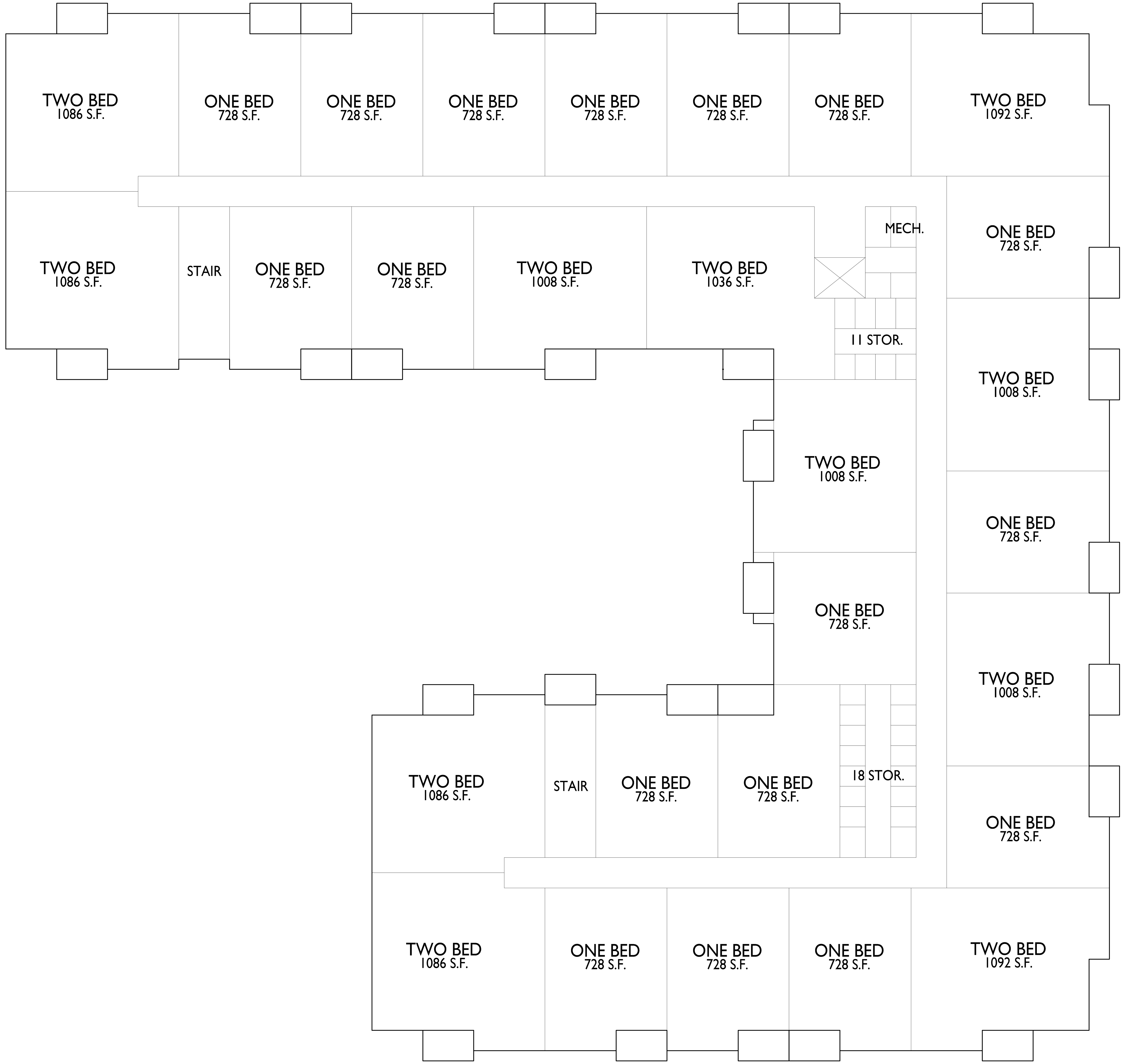
PROJECT TITLE
Multi-Family Development

Nesbitt Rd.
Fitchburg, WI

SHEET TITLE
First Floor Plan

SHEET NUMBER
A-1.1

PROJECT NO. 2448



1
A-1.2
SECOND & THIRD FLOOR PLAN
3/32" = 1'-0"

knothe • bruce
ARCHITECTS
Phone: 608.836.3690
8401 Greenway Blvd., Suite 900
Middleton, WI 53562

ISSUED
Issued - May 5, 2025

PROJECT TITLE
Multi-Family Development

Nesbitt Rd.
Fitchburg, WI

SHEET TITLE
Second & Third Floor Plan

SHEET NUMBER
A-1.2

PROJECT NO. 2448

Oakbrook
Integrated Real Estate Services

August 1, 2025

Mr. Jacob T. Klein
President
JT Klein Company
818 S. Park Street
Madison, WI 53715

RE: Oak Ridge Fitchburg

Dear Jacob,

This letter serves as evidence of Oakbrook Corporation's commitment to serve as the Property Management agent for Oak Ridge Fitchburg, a senior 62+ affordable housing community located in Fitchburg, WI. Oakbrook has significant experience in managing high-quality affordable housing projects throughout Wisconsin and has previously partnered with JT Klein on other successful housing developments.

Oakbrook's role in this development will be to serve as the third-party Property Manager. Oakbrook is involved throughout the development process, providing valuable input to the design and development team on such issues as market-oriented amenities, desirable unit layouts and compliance-oriented design issues. Oakbrook will market the property during construction and will manage all aspects of property management and programmatic compliance in the long term. This includes but is not limited to: establishing a tenant selection plan, waiting list, completing all aspects of the resident application process and resident screening, communicating with service providers assisting in supportive housing units, and maintaining the building.

Oakbrook further acknowledges that we are aware of JT Klein Company's application to the Dane County AHDF, and the requirements outlined in the Fair Tenant Selection Criteria. We also are aware of your commitment to Dane County's Tenancy Addendum. We have reviewed specifics of the addendum and will include these requirements as part of the lease documents and house rules.

If there are any questions regarding Oakbrook's role as Property Manager or commitment to the County's requirements, please feel free to contact me.

Sincerely,

Michael C. Morey
Senior Vice President

OakbrookResidential

Tenant Selection Plan

Oak Ridge Stoughton

July 29, 2024

TABLE OF CONTENTS

I. Introduction

a. Development Description Oak Ridge @ University Park II, located in Madison, WI ("Development") is a proposed 80-unit apartment community serving low-to-moderate income seniors that will be owned by JT Klein Company ("Owner") and managed by Oakbrook Corporation ("Management"). The Owner and Management, on behalf of the Owner, subscribe to the following procedures in qualifying applicants for occupancy in this Development, which includes 80 units subject to the statutory and regulatory requirements of the Federal Low Income Housing Tax Credit program ("LIHTC").

i. The LIHTC Requirements mean collectively, LIHTC of the Internal Revenue Code of 1986, as amended, 26 U.S.C. LIHTC, its implementing federal tax regulations set forth in 26 CFR Part 1.42, the Low Income Housing Tax Credit Extended Use Agreement between the Owner and the Wisconsin Housing & Economic Development Authority ("WHEDA") for the Development, and all applicable IRS revenue rulings, revenue procedures, tax assistance memoranda, and related written guidance and notices.

b. Tenant Type
   i. The Development is designated as housing for individuals and families
      1. Supportive Service Units – Sixteen (16) units at the Development are designated for Veterans, persons with disabilities, and those at risk of homelessness.

c. Unit Distribution
   i. 16 units at up to 30% of the median income in Dane County, WI ii. 32 units at up to 50% of the median income in Dane County, WI iii. 32 units at up to 80% of the median income in Dane County, WI

d. Rent Structure – Note that the tenant rent payment will not exceed the HUD annual published limits for the LIHTC program.

e. Nondiscrimination Policies
   i. General: Federal civil rights laws addressing fair housing prohibit discrimination against applicants or tenants on the basis of race, color, national origin, sex, gender, age, disability, religion, and familial status. Wisconsin fair housing regulations prohibit discrimination against applicants or tenants for federally protected classes plus the following: sexual orientation, marital status, ancestry, lawful source of income, and victims of domestic abuse or other crimes. Dane County fair housing regulations prohibit discrimination on the basis of federal and state protected classes plus the following: physical condition, mental illness, and handicap (including the right to service and companion animals), type of military discharge, physical appearance, gender identity and gender expression (including transgendered people), domestic partnership status, political beliefs, student status, and receipt of rental assistance.

   HUD's Office of General Counsel issued a memo dated April 4, 2016, which is guidance concerning how the Fair Housing Act applies to the use of criminal history by providers or operators of housing and real-estate related transactions.

   The Development is in compliance with this and other key federal civil rights laws regarding fair housing and accessibility as described below.

   ii. Fair Housing Act – The Development complies with Fair Housing Act Amendments of 1988 ("Fair Housing Act") which prohibits discrimination in housing on the basis of race, color, religion, sex, disability, familial status, and national origin regardless of any federal financial assistance. Fair Housing Act obligations include:
      1. Management will not refuse, either directly or indirectly, to rent or negotiate for rental of a dwelling based on race, color, religion, sex, disability, familial status, and national origin.

2. Management will not (i) engage in activities that steer potential tenants away from or toward particular units by words or actions, (ii) make housing units and related services unavailable to any potential tenants, (iii) purposely provide false information to applicants about the availability of units that limits the living options of prospective tenants, and (iv) deny or limit services based on race, color, religion, sex, disability, familial status, and national origin.
3. Management will market available units in a nondiscriminatory manner.
4. Management will make reasonable accommodations in rules, policies, practices, or services as may be necessary to afford handicapped persons equal opportunity to use and enjoy a dwelling.

iii. Section 504 of the Rehabilitation Act of 1973 (Section 504) prohibits discrimination based upon disability in all programs or activities operated by recipients of federal financial assistance. Section 504 obligations include the following:

1. Allowing for reasonable structural modifications (with prior approval and, in certain circumstances, at tenant's expense) to units and/or common areas that are needed by applicants and tenants with disabilities, unless these modifications would change the fundamental nature of the project or result in undue financial and administrative burdens.
2. Operating housing that is not segregated based upon disability or type of disability, unless authorized by federal statute or executive order.
3. Providing auxiliary aids and services necessary for effective communication with persons with disabilities.
4. Performing a self-evaluation of Management's programs and policies to ensure that they do not discriminate based on disability.
5. Developing a transition plan to ensure that structural changes are properly implemented to meet program accessibility requirements.
6. Section 504 also establishes accessibility requirements for newly constructed or rehabilitated housing, including providing a minimum percentage of accessible units.
7. In accordance with Section 504 of the Rehabilitation Act of 1973, accessible units are allocated using a special priority approach. When accessible units become available, the housing provider must offer the units in this order:
   a. To current residents that would benefit from the available unit's accessibility features, but whose current unit does not have such features
   b. To eligible and qualified households on the Waiting List with disabilities who would benefit from the available unit's accessibility features
   c. To other eligible and qualified households on the Waiting List (i.e., without disabilities) which may require the household to agree, in writing, to transfer to a non-accessible unit at the owner's request (the request will only be made if an accessible unit is not available to a person who requires the features of an accessible unit)
8. The Section 504 Coordinator for this property is:

   Jennifer Moran
   Oakbrook Corporation
   2 Science Court
   Madison, WI 53701

608-238-2600 800-947-
3529 TTY Relay

iv. Equal Access to Housing in HUD Programs Regardless of Sexual Orientation or Gender Identity:
   1. Effective March 5, 2012, HUD implemented new regulations intended to ensure that HUD's core housing programs are open to all eligible persons regardless of actual or perceived sexual orientation, gender identity or marital status (HUD Notice 2015-01).
   2. Owners and operators of HUD-assisted housing, or housing whose financing is insured by HUD, must make housing available without regard to sexual orientation, gender identity, or marital status.
   3. All otherwise eligible households, regardless of marital status, sexual orientation, or gender identity, will have the opportunity to participate in HUD programs.
   4. Owners and operators of HUD-assisted housing or housing insured by HUD are prohibited from asking about an applicant or occupant's sexual orientation and gender identity for the purpose of determining eligibility or otherwise making housing available.

v. Title VI of the Civil Rights Act of 1964: Prohibits all recipients of federal financial assistance from discriminating based on race, color, or national origin.

vi. Age Discrimination Act of 1975: Prohibits discrimination based upon age in federally assisted and funded programs, except in limited circumstances. It is not a violation of the Age Discrimination Act to use age as screening criteria in a particular program if age distinctions are permitted by statute for that program or if age distinctions are a factor necessary for the normal operation of the program or the achievement of a statutory objective of the program or activity.

vii. Executive Order 13166 – Limited English Proficiency: This Order requires Owner/Management to take reasonable steps to ensure meaningful access to the information and services they provide for persons with limited English proficiency. This may include interpreter services and/or written materials translated into other languages.

viii. Violence Against Women and Justice Department Reauthorization Act of 2005 & 2013 & Final Rule of 2016 ("VAWA"): VAWA protects victims of domestic violence, dating violence, sexual assault, or stalking, as well as their immediate family members generally, from being evicted or being denied housing assistance if an incident of violence is reported and confirmed.
   1. Owner/Management responding to an incident of actual or threatened domestic violence, dating violence, sexual assault, or stalking that could potentially have an impact on a tenant's participation in the housing program Owner/Management:
      a. May request in writing that an individual complete, sign and submit within 14 business days of the request, the HUD-approved certification form (HUD-91066).
      b. In lieu of the certification form or in addition to it, Owner/Management may accept (i) a federal, state, tribal, territorial, or local police record or court record or (ii) documentation signed and attested to by a professional (employee, agent or volunteer of a victim service provider, an attorney, medical personnel, etc.) from whom the victim has sought assistance.

2. Owner/Management will keep all information related to incident(s) of domestic violence, dating violence, sexual assault, or stalking in a separate secure location from other tenant files, and will not be shared unless:
    a. Individual's written consent is obtained;
    b. Information is required for use in an eviction proceeding or termination or assistance; or
    c. Otherwise required by law.
3. If a victim commits separate criminal activity, they may be evicted for engaging in crime. In addition, if a victim poses an actual and imminent threat to other tenants or those employed at, or providing service to, the property, they could be evicted. Management may evict residents submitting a false certification of domestic violence, dating violence, sexual assault, or stalking.
4. Management will remove, evict, and/or terminate assistance to an individual determined to be causing the abuse.

II. Preferences

a. Establishing Preferences – Preferences are not permitted if they in any way negate affirmative marketing efforts or fair housing obligations. The following preferences apply to the Development:
    i. Existing Tenant Preference: The following actions are always given priority if applicable, and if not, State Mandated Preferences take precedence.
        1. A unit transfer for household seeking protections under VAWA
        2. A unit transfer based on the need for an accessible unit
        3. A unit transfer for a medical reason certified by a doctor
        4. A unit transfer of a non-handicapped individual living in a handicapped accessible unit to accommodate a handicapped applicant on the Waiting List
        5. A unit transfer for other reasons approved by Management ii. Supportive Housing Preference: Preference will be given to veterans, persons with disabilities, and/or individuals at risk for homelessness for the 16 (sixteen) units set aside as supportive housing units.
    iii. State/Federal Mandated Preferences: The Development must comply with any state or federal mandated preferences as described below:
        1. Displaced from an urban renewal area

Displaced as a result of a government action

3. Displaced as a result of a major disaster iv. Optional Preferences: The Development does not have any optional preferences.

b. Verification of Preferences – The State/Federal Mandated Preferences will be verified by third party verification.

c. Selection of Households for Participation

    i. An eligible applicant who qualifies for a preference will receive housing before any other applicant who is not so qualified. These preferences take precedence over other applicants' place on the Waiting List, or date of submission of application. ii. Applicants will be informed of the availability of preferences and will be given an opportunity to certify that they qualify for a preference. Applicants may claim a preference at any time during the application process.

d. When a Preference is Denied

    i. If it is determined that an applicant does not meet the criteria for receiving a preference, the applicant will promptly receive a written notice of this determination from Management. The notice will contain a brief statement of the reasons for the determination, and state that the applicant has the right to meet with the Management's designee to review this decision. If the applicant requests a meeting, it will be conducted by a person or persons designated by Management.

    ii. Denial of a preference does not prevent the applicant from exercising any legal rights the applicant may have against Management and/or Owner.

e. Exceptions to the Preference Rule

    i. Relocation and/or Unit Transfers: Management must give priority to current households (i) when their units are designated for rehabilitation and/or (ii) for current households residing in a unit within the Development that has been designated as uninhabitable by federal, state, local municipalities or Management due to fire, flood, or other natural disaster.

III. Pre-Application Processing – Development will not use Preliminary Applications.

a. Distribution of Information – Information will be given to households who respond to the marketing efforts about the Development's preferences and will indicate that all applicants will be given an opportunity to show that they qualify for a preference.

    i. The information will state that those persons qualifying for a preference will receive housing before any other applicant who is not so qualified.

IV. Waiting List Procedures

a. Creation of Waiting List – If an applicant is eligible for tenancy but no appropriately sized unit is available (as referred to in Section VII Occupancy Standards), Management will place the applicant on the Waiting List for the Development. The Waiting List will be maintained electronically and in hard copy. Placement on the Waiting List does not guarantee occupancy; it merely means that these persons will be contacted in the future with detailed instructions on how to formally apply for residence at the Development. When names are placed on the Waiting List, persons will be informed that it is their responsibility to inform the Development's Management office of changes in mailing address, telephone number, email address, or TTY/TDD number (if applicable). A separate Waiting List will be maintained for the eleven (11) units set aside as supportive housing units.

b. Changes in Income or Household Composition

    i. When placed on the Waiting List, applicants will be informed to notify Management in writing if any changes to the following occur:

1. Address and/or phone number
2. Household composition
3. Preference status
4. Income

V. <u>The Screening (Interview) Process</u>

a. Application Requirements

The following information will be used to determine program eligibility for anyone who is seeking housing at the Development.

Live in aides, new household members, and police officers, security personnel or managers residing in units will be subject to same screening for drug abuse and other criminal activity applied to other applicants.

i. Application – All adult household members must complete an application and sign the Authorization for Release of Information Form. Management shall accommodate persons with disabilities who, as a result of their disabilities, cannot utilize the Management's preferred application process by providing alternative methods of taking applications.

ii. A credit report will be ordered and an application fee may be charged to cover the actual cost of this report.

iii. A criminal background search will be obtained including a search of a State and National sex offender registry. On-site management personnel do not search or review Wisconsin Circuit Court Access records.

iv. Verification of employment, income, bank accounts, and other assets is required as applicable for each applicant.

v. Current and previous housing for past two years is required. A lack of housing history will not be used as the basis for denial of an application.

b. 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). Applications will be processed on a first come first served basis.

c. Security Deposit Requirements – a security deposit will be required at move-in and will be based on screening results, but in any event shall not be more than one (1) month's rent.

VI. <u>Eligibility Requirements</u>

a. Income – The annual gross income of the applicant(s) must:

i. Be equal to or less than the income limit established by the applicable program's administrative rules for the appropriate household size; and

ii. Meet the 40% rent to income threshold

1. Adjustments to this policy may be made by Management depending upon a household's total assets and access to public assistance (e.g., food stamps, energy assistance, etc.)

If applicant cannot meet the minimum income requirement but can demonstrate the ability to comply with the rent obligation based on a rental history of paying an equivalent rent to income ratio for the prior 24 months, that condition shall be waived as a requirement for approval.

b. Sole Residence – The unit must be the applicant's sole residence in order for the applicant to be eligible for housing.

c. Social Security Numbers – Social security numbers for all U.S. citizens must be disclosed for all adult household members.

d. Date of Birth – Date of birth must be disclosed for all household members.

e. Student Eligibility Requirements HOME (if applicable) – HOME assisted units shall not be provided to any individual who:

   i. Is enrolled as either a part-time or full-time student at an institution of higher education, for the purposes of obtaining a degree, certificate, or other program leading to a recognized educational credential; and

   ii. Is under 24 years of age; and

   iii. Is not married; and iv. Is not a veteran of the United States Military; and

   v. Does not have a dependent child; and

   vi. Is not a person with disabilities and was not receiving section 8 assistance as of November 30, 2005; and vii. Is not living with his or her parents who are receiving Section 8 assistance; and

   viii. Is not individually eligible to receive Section 8 assistance or has parents (individually or jointly) who are not income eligible to receive Section 8 assistance. (Unless the student can demonstrate his or her independence from parents, the student must be eligible to receive Section 8 assistance and the parents (individually or jointly) must be eligible to receive Section 8 assistance in order for the tenant to be eligible.

f. Student Eligibility Requirements LIHTC – Households consisting entirely of full-time students (either currently or have been for five months of the current calendar year) do not qualify unless the household meets one of the following exceptions:

   i. All members of the household are married and are entitled to file a joint tax return.

   ii. The household consists of single parent(s) and their child (or children) and no one in the household is dependent of third party.

   iii. At least one member of the household receives assistance under Title IV of the Social Security Act (i.e. TANF). iv. At least one member of the household is participating in an officially sanctioned job training program.

   v. At least one member of the household was formerly in foster care.

VII. Occupancy Standards

a. The standards used at this development are:

   i. Maximum number of persons allowed in a 1BR unit is two (2) persons. The minimum number of persons required for a 1BR unit is one (1) person.

   ii. Maximum number of persons allowed in a 2BR unit is four (4) persons. The minimum number of persons required for a 2BR unit is one (1) person. iii. Maximum number of persons allowed in a 3BR unit is six (6) persons. The minimum number of persons required for a 3BR unit is two (2) persons.

   NOTE: Exceptions may be made on non-senior properties for minors under the age of two years old.

b. The unit applied for must have enough space to accommodate the applicant's household.

c. Management's occupancy standards comply with federal, state, and local fair housing and civil rights laws, landlord-tenant laws, and zoning restrictions.

VIII. Rejection Criteria – The ability of the applicant to fulfill lease obligations will be considered. In addition to verifying whether a household is income qualified and program eligible, Management will use various criteria in determining the acceptability of all applicants. An 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

   i. 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 an applicant is rejected based on the credit report, they will be provided the name of the credit bureau that performed the credit. Management will not disclose the specifics of any information reported by the credit bureau. Applicants will be given the opportunity to correct or clear the adverse credit.

   ii. The inability to verify credit references is a factor for rejection of an application. Consideration will be given for special circumstances in which credit has not been established.

c. Criminal Convictions/Current Drug Use

   i. Applicants who fall into the following categories will be rejected:

      1. Any household in which any member whose use of marijuana, or current addiction to or engagement in the illegal use of a controlled substance interferes with the health, safety, or right to peaceful enjoyment of the premises by other residents will be denied admission and, if an occupant, will be subject to termination of tenancy.
      2. Any household in which any member was evicted in the last three years from federally assisted housing for drug-related criminal activity. Exception: if the evicted household member has successfully completed an approved supervised drug rehabilitation or the circumstances leading to the eviction no longer exist (e.g., the household member no longer resides with the applicant household).
      3. Any household member that is subject to a state sex offender lifetime requirement.
      4. Any household member for whom there is reasonable cause to believe that the member's behavior, from abuse or pattern of abuse of alcohol, may interfere with the health, safety, and right to peaceful enjoyment by other residents. The screening standards must be based on behavior, not the condition of alcoholism or alcohol abuse.
      5. Any household member who has been convicted of the following felonies:

         a. Homicide
         b. Kidnapping/abduction
         c. Forcible Sex
         d. Arson

   ii. Additional criminal history will be considered and may be the cause of rejection:

      1. Assault

      Domestic abuse resulting in assault or battery charges unless applicant is a victim of domestic violence, dating violence, sexual assault, or stalking as defined by the Violence Against Women Act (VAWA)

      3. Weapons violations
      4. Other violent felonies not listed above
      5. Fugitive felon status or parole violations
      6. Theft, burglary, breaking and entering, fraud or larceny
      7. Vandalism exceeding $1,000
      8. Disturbing the peace (repeat offender)
      9. Criminal trespass

10. Other criminal behavior that would threaten the health, safety, or right to peaceful enjoyment of the premises by other residents or people who live in the immediate vicinity of the site or the health and safety of the owner, employees, contractors, subcontractors or agents of the owner.

iii. Management will consider the criminal activity that occurred during the following periods:
1. Misdemeanors during the past seven-year period
2. Gross misdemeanors during the past fifteen-year period
3. Felonies (not listed as automatic rejections) during the past ten-year to thirty-year period

d. History of Residence

i. Management will consider whether the applicant or any other person who will be living in the unit, has a history of physical violence to persons or property, or has exhibited living habits at prior residences that could adversely affect the health, safety, and quiet enjoyment of other residents at the rental community. Management will consider all circumstance regarding this type of activity as well as the period during which it occurred.

e. Household Characteristics – Household size or household characteristics were not appropriate for the specific type of unit available at the time of application.

IX. Rejection Procedures

a. If Management rejects an application, a formal letter of rejection will be sent to the applicant at the address shown on the application unless otherwise notified. If the cause for rejection is due to an unfavorable credit history, the applicant will be notified of the credit reporting service, their address and telephone number for direct contact with the service. If it can be verified that the credit report is in error, the application will be re-processed, and, if accepted, the application will be prioritized according to the original application date. Management may not discuss credit-reporting information with the applicant.

X. Special Occupancy Categories – Applicants will be interviewed and processed as authorized in Sections V through VIII, with exceptions made as follows: a. Persons with Disabilities

i. An applicant with disabilities will be given priority for an accessible unit if such applicant deems that this type of unit is appropriate for their household.

ii. If the household determines that the accessible unit is not appropriate for the household's needs, the household's name will be returned to its place on the Waiting List.

Lutheran Social Services
of Wisconsin and Upper Michigan, Inc.
Act compassionately. Serve humbly. Lead courageously.

Phone: (414) 246-2300 • Fax: (414) 246-2524

6737 W Washington St, Ste 2275
Milwaukee, WI 53214

8/4/2025

Dane County Department of Human Services
Division of Housing Access & Affordability
Attention: Ms. Jenna Wuthrich
1202 Northport Drive
Madison, WI 53704

RE: Oak Ridge Fitchburg -Commitment to Ending Homelessness

Dear Ms. Wuthrich:

As the proposed Supportive Services Provider for Oak Ridge Fitchburg, Lutheran Social Services (LSS) is proud to partner with JT Klein on a development that addresses a critical need in Dane County—quality, affordable housing for individuals and families experiencing homelessness.

LSS is deeply committed to ending homelessness in the communities we serve, including right here in Dane County. Our collaboration with JT Klein represents an impactful opportunity to advance this mission and make a lasting impact.

Oak Ridge Fitchburg will include sixteen integrated supportive housing units, including 30% units specifically designated for individuals experiencing homelessness. LSS will deliver comprehensive supportive services, through a collaborative services model, beginning with referrals from the Coordinated Entry (CE) system and continuing throughout each resident's tenancy. From move-in day forward, residents will have the ability to connect to individualized services and supports needed to maintain housing stability and long-term success. Oak Ridge Fitchburg will support this goal by providing an annual estimated Service Coordination budget of $80,000 or $5,000 per Supportive Service Unit, which equates to a Service Coordinator position of approximately 0.60 FTE.

This partnership will not only provide safe, affordable housing but also create a pathway for residents to access the support they need to be successful at Oak Ridge Fitchburg and beyond.

Sincerely,

Dennis Hanson
Vice President

Memorandum of Understanding For
Oak Ridge Fitchburg
Fitchburg, WI

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

Scope of Services:

LSS will provide in person, onsite supportive service provision at Oak Ridge Fitchburg. LSS's services will target the tenants residing in the project's set aside units, who require and request access to supportive services to maintain housing. The primary target population will be specific to any individual(s) experiencing homelessness or at risk of homelessness on the community by-name list managed by the Dane County Homeless Services Consortium. If a targeted unit is not filled after being held open for a minimum of thirty days from vacancy, LSS will attempt to fill with a secondary target population. This will include individuals with permanent developmental, physical, sensory, medical or mental health disabilities, or a combination of impairments that make them eligible for long-term care services.

LSS will designate a Service Coordinator to Oak Ridge Fitchburg and will be responsible for providing the target population at the site with care coordination, supportive, referral and advocacy services in the general community for which they are entitled, with a desired outcome of keeping them independent in their units. Specific services to be offered under this agreement include:

- Established open office hours onsite at Oak Ridge Fitchburg to conduct individualized, one-to-one supportive services. Services will be targeted to the tenants residing at the project's sixteen (16) 30% AMI set aside units, but will be available to all tenants residing in the project's remaining affordable units. LSS will be provided a designated office space for supportive services programming at Oak Ridge Fitchburg, that is private and accessible to all tenants at the property.

- Completion of an intake and needs assessment for tenants seeking service coordination services. The Service Coordinator will make reasonable attempts to engage the target population residing in the projects set aside units in a person-centered intake process. This assessment will provide necessary information about a tenant's needs, challenges, and circumstances. It is understood and agreed that the tenant must voluntarily agree to participation in services.

- Development of a supportive housing management plan for tenants who completed the intake assessment. This plan provides an outline for both the tenant and service coordinator in addressing the tenant's needs, ensuring services are targeted, coordinated, and effectively meeting the tenant's identified goals. Plans specifically include tenant's strengths, goals and objectives, tenant and service coordinator responsibilities in supporting the plan, and agreed upon by both the tenant and service coordinator to ensure a successful outcome and achievement of goals. LSS encourages and promotes, minimally, monthly contact with the Service Coordinator, for tenants who have an active supportive housing management plan.

- Provide supportive programming and direct services to tenants that are individualized to support the tenant's supportive housing management plan. This will be accomplished by:

    - The assigned Service Coordinator will provide a site visit during the pre-lease-up phase of the development. After the initial lease-up of the project, the assigned Service Coordinator will operate onsite at Oak Ridge Fitchburg, 8 hours per week, for the term of this agreement. Hours per week will be evaluated as needed to ensure the proper supportive plan is adequate.

    - Providing specific supportive services to support tenant independence and self-sufficiency in identified needs areas on the individuals supportive housing plan. This may include care coordination and referrals to community resources or provision of direct services to best meet the tenant's goal(s). Follow up and aftercare is provided to ensure the support is meeting the tenant's needs on an ongoing basis. Specific supportive services provided include:

- Employment and Educational Assistance: resume building, interview skills, completing employment applications professionally, enrollment in English as a Second Language courses, GED, post-secondary, and/or higher education programs, scholarship research, assistance with scholarship applications, accessing job training programs, identifying suitable job opportunities and navigating unemployment benefit applications.
- Life Skill Development: communication, problem-solving, decision-making, time management, coping mechanisms, social skills, self-advocacy, and health literacy
- Physical and Mental Health Support: care coordination, behavioral support, utilization management, and provider information and referral services
- Substance Use Treatment Services and Referrals
- Assistance in Accessing Benefit and/or Entitlement Services: completion of benefit checklists to determine eligibility and need for services/programs, assistance accessing, applying, and renewing public assistance benefits including Medicaid, Supplemental Security Income (SSI/SSDI), and Supplemental Nutrition Assistance Program (SNAP), and benefit coordination support and education
- Healthy and Nutritional Living: coordinating care, referrals and support for tenants seeking to improve their health in areas such as nutritional counseling, fitness routines/physical activity, smoking cessation, and weight management
- Financial Literacy: support tenants to improve financial literacy through education and guidance in budgeting and developing a savings plan. Services also include coordination and referrals to financial counselors to enhance financial literacy skills such as debt management, investing, and credit repair and building.

- LSS will provide bi-annual educational and/or wellness services with an emphasis on presentations designed to assist in overcoming barriers as identified on the tenant assessments. Potential sessions include self- improvement, employment and educational opportunities and financial management, and developing relationships with local community, county, and state resources who provide support to the targeted population.

- Tenants will initially be made aware of the supportive services available to them upon move in, or during their new resident orientation if residing in a supportive unit. The Service Coordinator will make contact with all new tenants that move into a supportive unit, within 14 days of moving into the community, to make an introduction and provide further information on accessing and obtaining services. LSS will routinely market services to all tenants onsite through resident newsletters, calendars, and flyers posted near commons spaces at Oak Ridge Fitchburg. LSS's Service Coordinator's working hours and contact information will be posted clearly for tenants, to ensure clear access to services when needed. LSS Services are available, without restriction, to any tenant that wishes to engage with the LSS Service Coordinator. Utilization of services is not a condition of tenancy.

- LSS will maintain regular communication with property management to maintain awareness and updates on supportive unit move ins and move outs. The LSS Service Coordinator will willingly participate in and facilitate engagement with the property manager and will be included in property team meetings that include site based team members supporting Oak Ridge Fitchburg. These meetings will focus on general property updates, concerns related to tenant health and safety, information on lease violation notices provided to tenants, and additional topics as needed where the onsite service coordinator can be of support.

LSS agrees to assist the property management group in outreach and engagement efforts with community partners and agencies that provide long-term support specifically to the targeted population. This is done to raise awareness of the specific opportunities available to the target population. Such agencies or partners could include: Dane County Continuum of Care, Aging and Disability Resource Centers, Managed Care Organizations, Health and Human

Services agencies, and other providers supporting the targeted population(s) for this project.

The goal of the Service Coordinator is to enhance the success of tenants residing in the supportive housing units and to promote their ability to remain in their unit successfully. The services identified above will enhance independent living success and promote dignity of residents by addressing needs with a one-on-one approach. LSS will work with the management company to market the set aside units to the target population including individuals experiencing homelessness off the Coordinated Entry (CE) list. LSS will refer clients from Dane County's Coordinated Entry list and/or LSS's Dane County Homelessness's programs to the Oak Ridge Fitchburg during lease up. Thereafter, property management will inform LSS of any open set aside units to refer applicable clients to the property.

Annual Budget

The annual fee for providing Service Coordination as above is estimated to be $80,000 ($5,000 per Supportive Service Unit) which equates to a Service Coordinator position of approximately 0.60 FTE. Lutheran Social Services shall be compensated for up to five thousand dollars per Supportive Service unit annually. Compensation is contingent upon verification of services delivered. LSS shall maintain accurate and complete records of all hours of service provided onsite and shall submit a monthly report to JT Klein detailing the total number of onsite service hours during the reporting period, the individuals providing the services, and any additional information reasonably requested by JT Klein. JT Klein and LSS will work collaboratively to identify and allocate this annual amount toward specific supportive service needs or programming priorities as they arise. These amounts will be paid by Oak Ridge Fitchburg, oakbrook@invoices.com. to LSS commencing with certificate of occupancy for the named project, and annually thereafter through completion of the compliance period, as indicated above, on the anniversary of initial certification of occupancy.

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

DEVELOPER: JT Klein Company

Signature: ____________ Title: President Date: 8-6-2025

Management Agent: Oakbrook Corporation

Signature: ____________ Title: Senior VP Date: 8.5.2025

LUTHERAN SOCIAL SERVICES OF WISCONSIN AND UPPER MICHIGAN, INC.

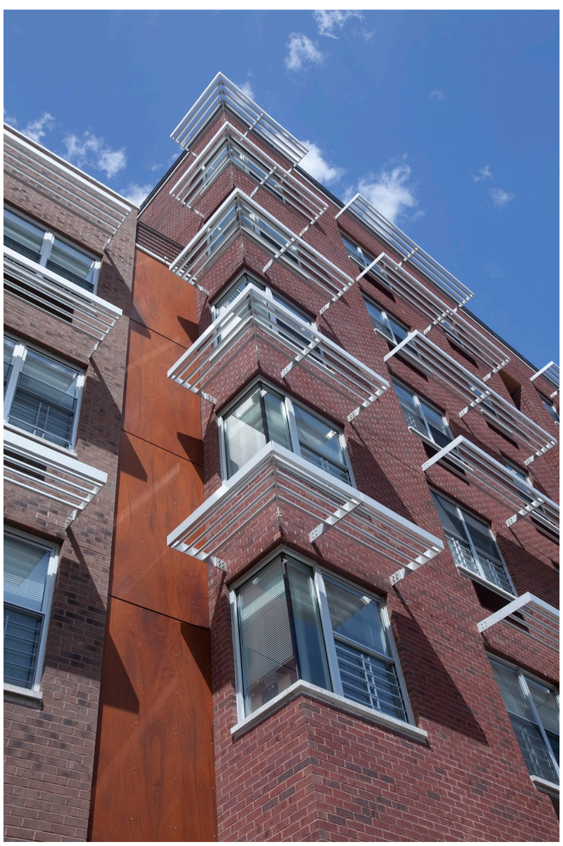
Signature: ____________ Title: Vice President Date: 8/5/2025

Enterprise

Welcome Kevin O'Donnell
Home

Home | Developments - Green | Tools & Information

Welcome to our Enterprise e360 Community, a platform that will facilitate a 360° exchange of documents and information, as well as two-way communication with our partners.
Access to these portals can be gained through the band above. This platform was designed to provide an enhanced user experience for our partners, one on which we will be building into the future. We look forward to receiving your feedback, and recommendations for how we can continue to improve our work together.



General Information

Disaster Prep...

November 02, 2020

In the attached, please find links to forms, guidance and toolkits for your use to ensure your teams and properties are ready for an emergency. As always, please reach out to your Enterprise contact(s) if you have any questions, concerns or would like assistance utilizing any of these resources.

Disaster Preparedness Resources.pdf

View More >>

Oak Ridge Fitchburg	Operating Budget								
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9
Income									
Gross Potential Rent	$1,164,264	$1,187,549	$1,211,300	$1,235,526	$1,260,237	$1,285,442	$1,311,150	$1,337,373	$1,364,121
Vacancy	$ (81,498)	$ (83,128)	$ (84,791)	$ (86,487)	$ (88,217)	$ (89,981)	$ (91,781)	$ (93,616)	$ (95,488)
Other Income	$ 36,000	$ 36,000	$ 36,000	$ 36,000	$ 36,000	$ 36,000	$ 36,000	$ 36,000	$ 36,000
Total Income	**$ 1,118,766**	**$ 1,140,421**	**$ 1,162,509**	**$ 1,185,039**	**$ 1,208,020**	**$ 1,231,461**	**$ 1,255,370**	**$ 1,279,757**	**$ 1,304,632**
Operating Expenses									
Marketing	$ (15,000)	$ (15,150)	$ (15,302)	$ (15,455)	$ (15,609)	$ (15,765)	$ (15,923)	$ (16,082)	$ (16,243)
Payroll	$ (140,000)	$ (144,200)	$ (148,526)	$ (152,982)	$ (157,571)	$ (162,298)	$ (167,167)	$ (172,182)	$ (177,348)
Other Administrative	$ (20,000)	$ (20,600)	$ (21,218)	$ (21,855)	$ (22,510)	$ (23,185)	$ (23,881)	$ (24,597)	$ (25,335)
Management Fees	$ (55,938)	$ (57,021)	$ (58,125)	$ (59,252)	$ (60,401)	$ (61,573)	$ (62,768)	$ (63,988)	$ (65,232)
Utilities	$ (60,000)	$ (61,800)	$ (63,654)	$ (65,564)	$ (67,531)	$ (69,556)	$ (71,643)	$ (73,792)	$ (76,006)
Security	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Maintenance Exp.	$ (60,000)	$ (61,800)	$ (63,654)	$ (65,564)	$ (67,531)	$ (69,556)	$ (71,643)	$ (73,792)	$ (76,006)
Property Taxes	$ (160,000)	$ (164,800)	$ (169,744)	$ (174,836)	$ (180,081)	$ (185,484)	$ (191,048)	$ (196,780)	$ (202,683)
Insurance	$ (36,000)	$ (37,800)	$ (39,690)	$ (41,675)	$ (43,758)	$ (45,946)	$ (48,243)	$ (50,656)	$ (53,188)
Reserves for Replacement	$ (24,000)	$ (24,720)	$ (25,462)	$ (26,225)	$ (27,012)	$ (27,823)	$ (28,657)	$ (29,517)	$ (30,402)
Total Operating Expenses	**$ (570,938)**	**$ (587,891)**	**$ (605,375)**	**$ (623,406)**	**$ (642,004)**	**$ (661,187)**	**$ (680,975)**	**$ (701,387)**	**$ (722,444)**
Net Operating Income	$ 547,827	$ 552,530	$ 557,135	$ 561,633	$ 566,016	$ 570,273	$ 574,395	$ 578,370	$ 582,188
Debt Service	$ (469,632)	$ (469,632)	$ (469,632)	$ (469,632)	$ (469,632)	$ (469,632)	$ (469,632)	$ (469,632)	$ (469,632)
Asset Management	$ (5,000)	$ (5,000)	$ (5,000)	$ (5,000)	$ (5,000)	$ (5,000)	$ (5,000)	$ (5,000)	$ (5,000)
Cash Flow	$ 73,195	$ 77,898	$ 82,503	$ 87,001	$ 91,384	$ 95,641	$ 99,763	$ 103,738	$ 107,556

Year 10
$1,391,403
$ (97,398)
$ 36,000
$ 1,330,005
$ (16,405)
$ (182,668)
$ (26,095)
$ (66,500)
$ (78,286)
$ -
$ (78,286)
$ (208,764)
$ (55,848)
$ (31,315)
$ (744,168)
$ 585,837
$ (469,632)
$ (5,000)
$ 111,205