



Affordable Housing Fund – Tax Credit RFP

Developers Seeking 2025 WHEDA Tax Credits for
Rental Housing Development

Application Workshop

City of Madison Community Development Division

July 10, 2024

2024 Affordable Housing Fund-Tax Credits RFP



[AHF-TC RFP LINK](#)

REQUEST FOR PROPOSALS

RFP # 13059-2024

**Affordable Housing Fund:
Rental Housing Development Proposals
Seeking 2025 WHEDA Tax Credits
(AHF-TC)**

Release Date: July 1, 2024

**Due Date: 12:00 p.m., NOON
Thursday, August 1, 2024**

AHF-TC Application Workshop Agenda

1. RFP Overview

- Goals, Objectives, Requirements & Preferences + 2024 Updates
- Affordable Housing Target Area Map – *Matt Frater, CDD*
- Tenant Selection & Affirmative Marketing Plan Standards – *Matt Frater, CDD*
- Integrated Supportive Housing – *Linette Rhodes, CDD*

2. Planning & Zoning – *Colin Punt, Planning Division & Jenny Kirchgatter, Zoning*

3. Energy Efficiency & Sustainable Design - *Focus on Energy- Jesus Rangel*

- New Construction Energy Design Assistance Program – EDA Express
- Renewable Energy Competitive Incentive Program (Solar)

4. CDD Application Process & Timeline

- Questions?



Neighborhoods & Housing

Madison will have a full range of quality and affordable housing opportunities throughout the City

Same as 2023

Create Affordable Housing Throughout the City

Continue funding affordable housing through the Affordable Housing Fund using an RFP for Section 42 developments

AHF-TC RFP
Increase the quantity of safe, quality, **affordable rental housing** throughout the City particularly in locations that are **well served by transit** and are proximate to places of employment, schools, parks, health care & other basic amenities

Affordable Housing Fund–Tax Credit Program

As of July 1, 2024

Status	# of Developments	Total Units	Affordable Units*
Completed	23	1,787	1,378
Under Construction	4	510	405
Planned**	5	423	350
TOTAL	32	2,720	2,133

Affordable Housing Fund-TC Program has been a SUCCESS!!

**Affordable Units are defined as units income and rent restricted for households at or below 60% of Dane County Median Income (CMI/AMI)*

*** LIHTC award secured or 4% anticipated*

Affordable Housing Fund–Tax Credit RFP

2024 Goals

Same as
2023

1. **Increase the supply** of safe, quality, affordable rental housing, especially units **affordable to households with incomes at or below 30% of area median income**, to ensure long-term affordability and sustainability.

NEW CONSTRUCTION

2. **Preserve existing** income- and rent-restricted rental housing to ensure long-term affordability and sustainability.

PRESERVATION

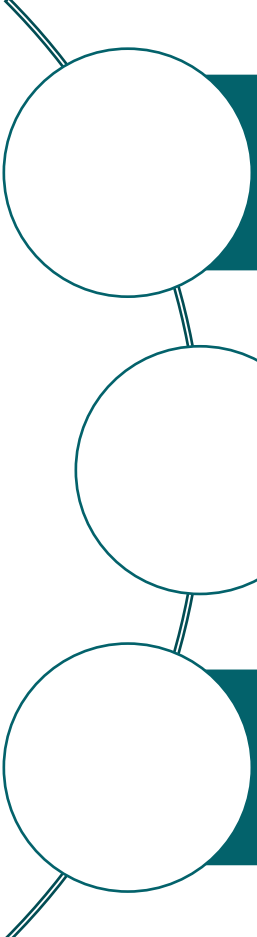
3. **Improve the existing rental housing stock** through acquisition/rehab to ensure long-term affordability and sustainability.

REHAB

Affordable Housing Fund–Tax Credit RFP

Objectives

Same as
2023



Implement the Goals, Strategies and Actions outlined in **Imagine Madison**, the City of Madison's Comprehensive Plan, particularly prioritizing well-sited infill development.

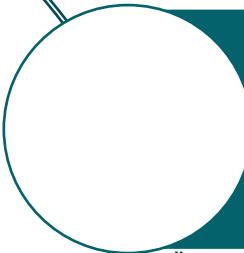
Excellent **proximity to amenities such as public transit**, employment opportunities, a full-service grocery store, health facilities, schools, parks, and other key amenities.

Create opportunities for residents to **remain in neighborhoods** impacted by current and potential rapid housing cost increases

Affordable Housing Fund–Tax Credit RFP

Objectives


Same as
2023



Achieve a **wider dispersion** of affordable rental housing throughout the city; discourage **high concentrations** of new assisted housing *without* access to **frequent transit**



Align with the City's **Racial Equity & Social Justice Initiative (RESJI)** through inclusive development partnerships with **BIPOC developers**, and providing opportunities to ACRE students and graduates



Embrace the City's commitment to **energy efficiency, renewable energy & sustainable building design** techniques that contribute to the City's goal to achieve 100% renewable energy and zero-net carbon emissions by 2050 community wide

Affordable Housing Fund–Tax Credit RFP 2024 Highlights

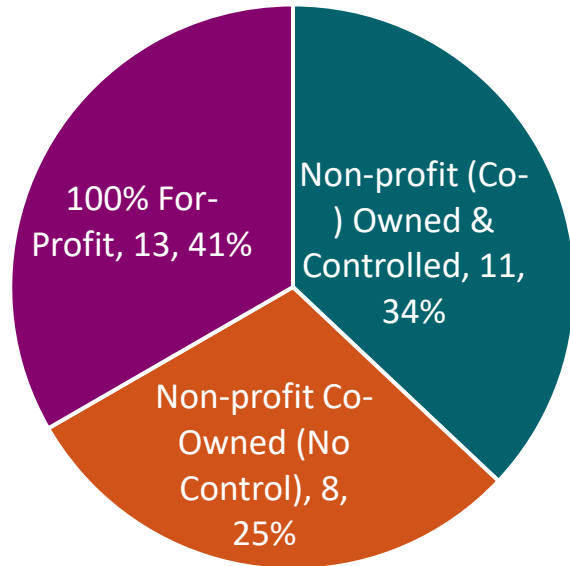
Same as 2023*
*mostly

- Emphasis on Goal of 30% AMI units – the biggest need
- Permanent Affordability + Shared Appreciation Waiver
- Long-Term Affordability Requirement - Minimum 40 years
- Tenant Selection Plan & Affirmative Marketing Plan Standards
- Energy Efficiency, Renewable Energy, Decarbonization & Sustainable Design
- Map with Preferred Transit Oriented Development (TOD) Areas
- 4% non-competitive opportunity WITH minimum of 20 5% of units at 30% AMI

Affordable Housing Fund–Tax Credit RFP

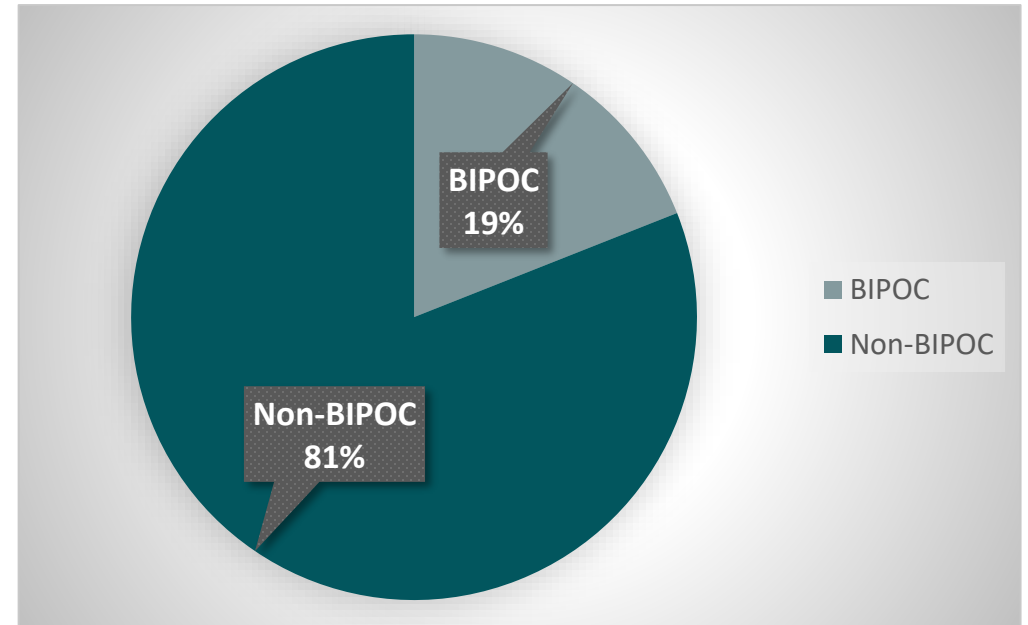
Highlights 2024 – Partnership Preferences

Non-Profit Ownership & Control



- Non-profit (Co-) Owned & Controlled
- Non-profit Co-Owned (No Control)
- 100% For-Profit

BIPOC Developers/Partners



Affordable Rental Housing-TC RFP

Energy Efficiency & Sustainable Design

Same as
2023







Requirements

- Focus on Energy - Energy Design Assistance Initial Application
 - Implement Focus's Recommendations @ 20% over baseline energy savings
- Renewable Energy:
 - Min. 30 kw solar PV array

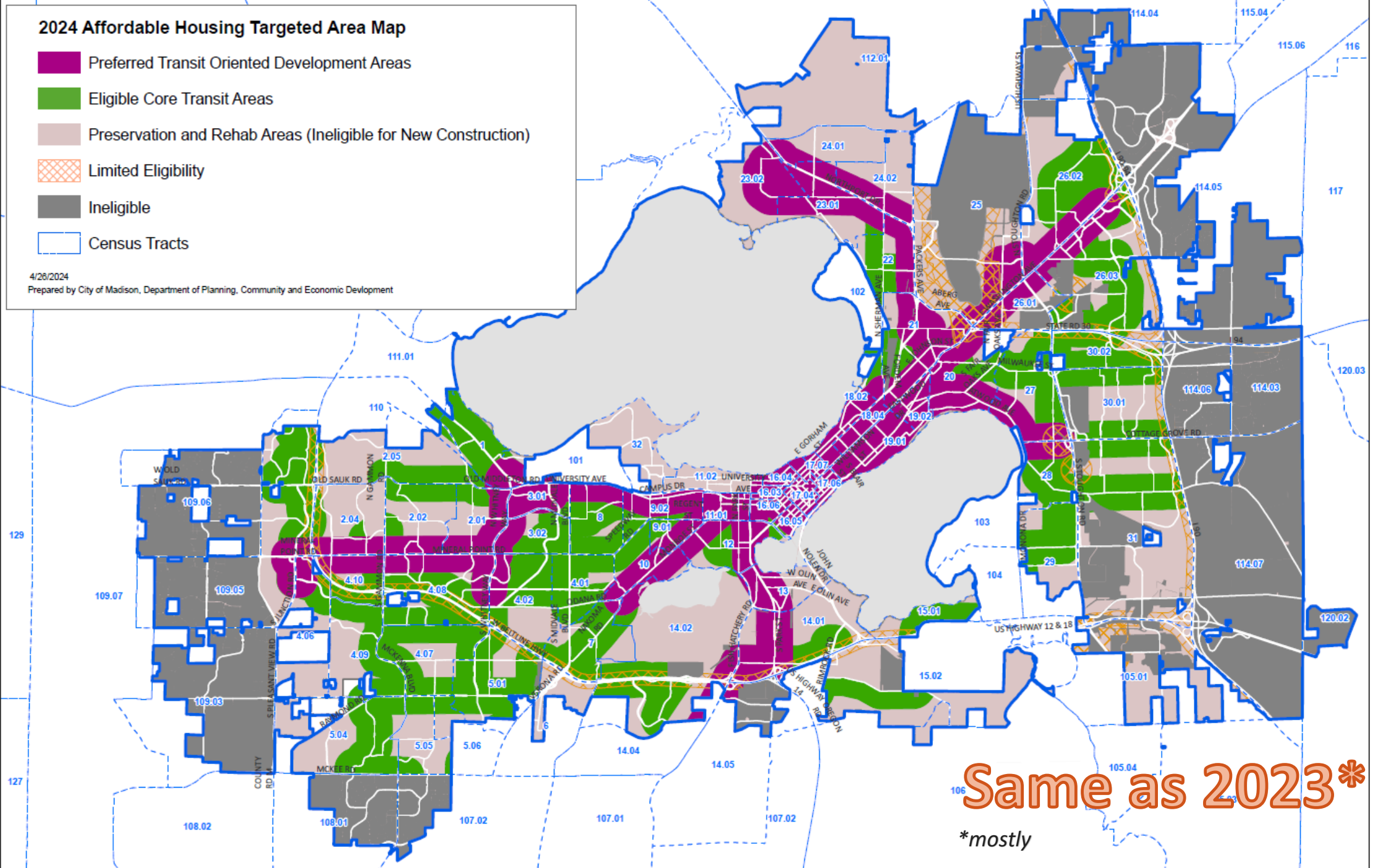
Preferences

- Energy Efficiency w/ Focus – Implement Highest EE Recommendations
- Renewal Energy: Implement largest feasible solar PV array
- Sustainability: AIA – Framework for Design Excellence

2024 Affordable Housing Targeted Area Map

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

4/26/2024
Prepared by City of Madison, Department of Planning, Community and Economic Development



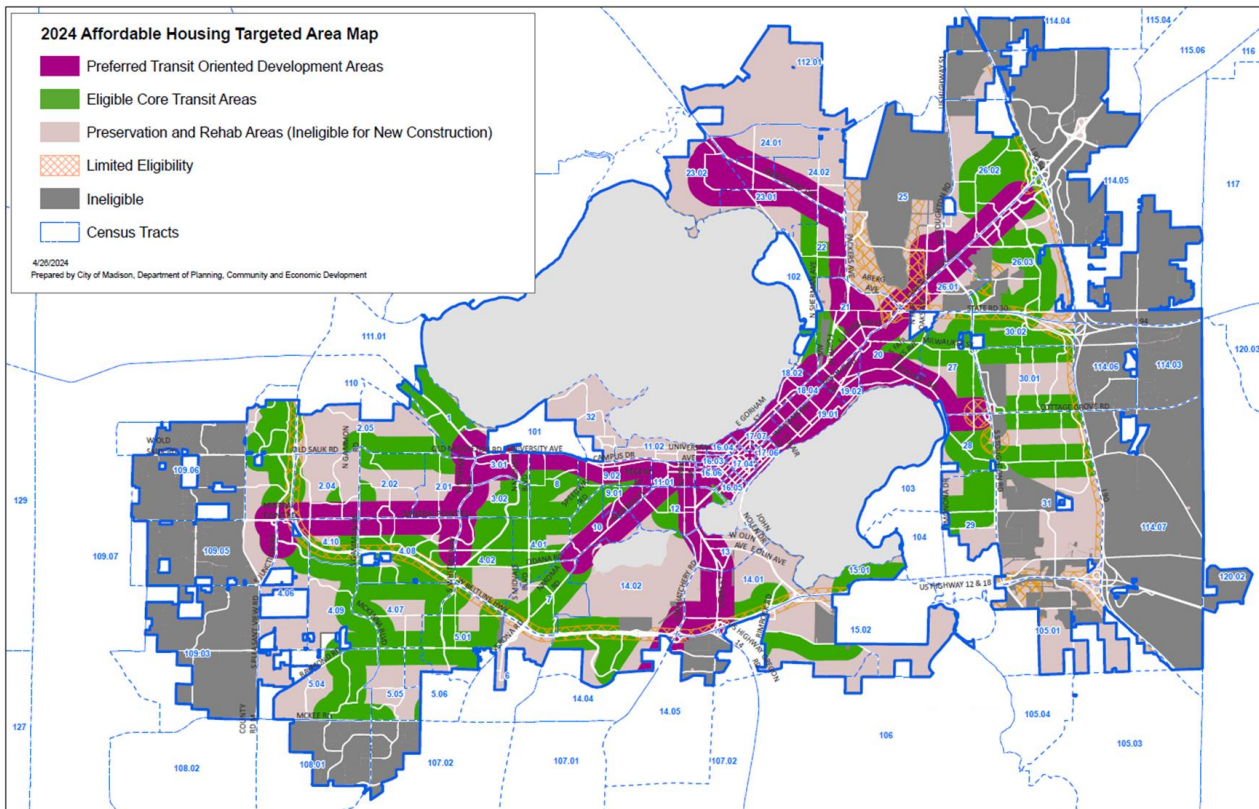
Same as 2023*

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2024 Affordable Housing Targeted Area Map

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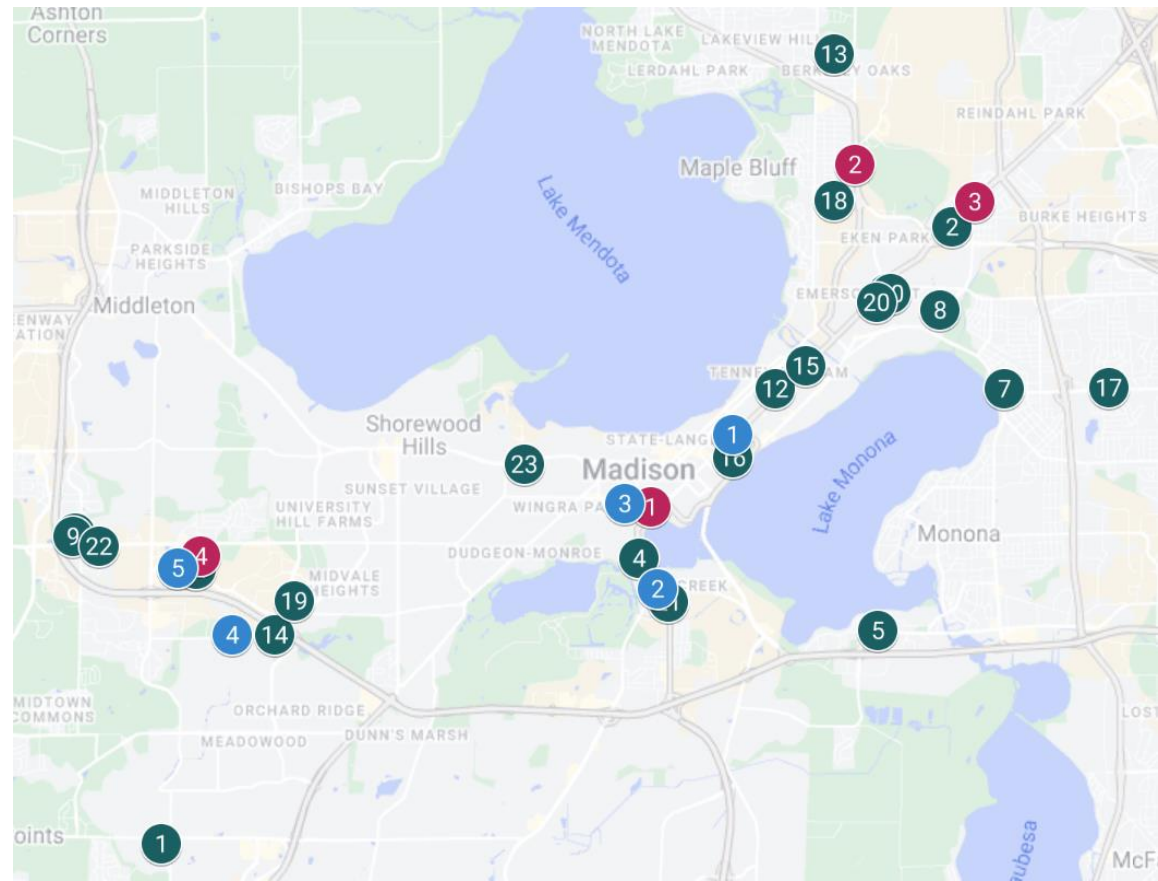
4/26/2024
Prepared by City of Madison, Department of Planning, Community and Economic Development



Where Madison wants affordable housing development



Where it has been (or soon will be) developed



Tenant Selection Plan (TSP) Standards

Same as
2023

Purpose:

- Affordable housing should alleviate barriers from adverse credit histories, rental histories, or criminal convictions
- Tenants remain stable in housing by minimizing insurmountable barriers to tenancy
- CDD's Standards outline written TSP requirements re: eligibility criteria, wait lists, and serving targeted populations

Examples from TSP Standards:

- Applicants cannot be denied for:
 - Credit score alone
 - Insufficient credit history
 - Credit report information that is disputed, in repayment, or substantially unrelated to prior housing obligations
- Must allow for cosigner

Tenant Selection Plan (TSP) Standards

Same as
2023

Examples from TSP Standards:

- Applicants cannot be denied for:
 - Eviction filings that were dismissed
 - Eviction filings with no judgement
 - Any eviction older than 2 years from date of application
- Limits on:
 - Security Deposit Maximum
 - Must have installment option
 - Rent Increases in Renewals
 - Non-Renewals
- Applicants cannot be denied for:
 - Conviction, determination, or adjudication in the juvenile justice system
 - Conviction for any Misdemeanor offense, unless the offense has a “substantial relation to tenancy” and the date of conviction is within 2 years of the date of application
 - Criminal conviction for any Felony offense for which the date of conviction is more than 5 years from the date of application, unless the offense has a “substantial relation to tenancy”
 - Conviction for any offense for which the date of conviction is more than 10 years from the date of application, the Maximum Lookback Period

Affordable Housing Fund–Tax Credit RFP

Highlights 2023 – Tenant Selection Plan Standards

Same as
2023

	Misdemeanors	Felonies
Can Deny:	<ul style="list-style-type: none"> • “Violent criminal activity” as defined in 24 CFR § 5.100 up to 2 years post-conviction • “Drug-related criminal activity” as defined in Wis. Stat. 704.17(3m)(a)(2) up to 2 years post-conviction 	<ul style="list-style-type: none"> • Any felony with a date of conviction 5 years or less from date of application • Felony “Violent criminal activity” as defined in 24 CFR § 5.100 up to 10 years post-conviction • Felony “Drug-related criminal activity” as defined in Wis. Stat. 704.17(3m)(a)(2) up to 10 years post-conviction
Cannot be Considered:	<ul style="list-style-type: none"> • Any misdemeanor with a date of conviction older than 2 years from date of application 	<ul style="list-style-type: none"> • Any felony not meeting the violent or drug-related definition above with a date of conviction older than 5 years from date of application

More information on all Standards contained in Attachment B-1

Tenant Selection Plan (TSP) Standards

Same as
2023

- Submit TSP Consistent with Standards with Application
- TSP must also be consistent with Wis. Stats 704, ATCP 134, and LIHTC Regulations
 - Ex: Max application fees, Credit and Criminal Reports, SSNs, etc.
- See full Attachment B-1
- Share/Review with Property Management and Service Provider

TSP Checklist Available on CDD Website

City of Madison TSP Checklist			
		PROJECT:	
			<i>Yellow : Missing Red : Inconsistent with TSP Standards</i>
#	Status (x)	Item	Standard
Overall Standards			
1		Written TSP	TSP must be available to applicants before they apply &/or pay application fee.
2		Wait List	TSP must provide for the selection of tenants from a written wait list in order of their application.
3		Wait List	Applications for SH units and/or units with stated priority set-asides must have either a separate Wait List or a prioritization mechanism. All descriptions of the Wait List in the TSP must detail prioritization criteria.
Eligibility Criteria			
4		Eligibility Criteria	TSP must provide clear information on eligibility criteria. Must also state processes and criteria that will be used to evaluate applications.
5		Income Criteria	Must detail clear minimum and maximum income requirements.
6		Minimum Income	Applicants shall not be denied for applying with incomes below minimum income requirements if applicant can demonstrate ability to pay equivalent rent to income ratio for 2 years or with a tenant-based rental subsidy.

Affordable Housing Fund–Tax Credit RFP

AMP Standards

Same as
2023

- **Affirmative Marketing Plan Standards (Att. B-2)**
 - Early & extensive targeted outreach and marketing efforts
 - Lease-Up Coordination
 - Language Access
 - Ensuring translation and/or interpretation are available to LEP households, households with a primary language other than English, and households that do not speak English
 - Marketing must be language-appropriate
 - Authentic Partnerships & Outreach to Community Organizations
 - Accessible Leasing
 - No in-person requirement if accommodation requested
 - Easily accessible, transit accessible

More information on all Standards contained in Attachment B-2

Affordable Housing Fund–Tax Credit RFP

Integrated Supportive Housing Component

Same as
2023

Target Population(s)

1. Individuals and/or families experiencing homelessness
2. Other Supportive Service Target Populations, which may include:
 - Previously incarcerated individuals re-entering the community; and/or
 - Other target populations that meet an identified community need

Homeless Services Consortium of Dane County

EXTREME WEATHER NOTIFICATION

Need Help? Get Help

Contact Us

Community Pl

Subscribe to the HSC Listse

Donate Now

WHO WE ARE

GET HELP

DATA

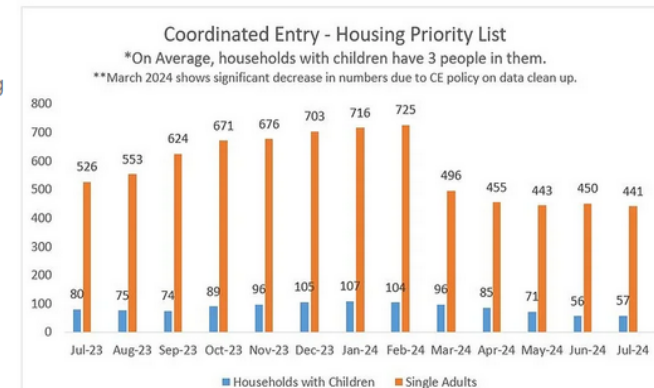
RESOURCES

GET INVOLVED

Coordinated Entry Data

Coordinated entry is a process developed to ensure that all people experiencing a housing crisis have fair and equal access and are quickly identified, assessed for, referred and connected to housing and assistance based on their strengths and needs. When a household is identified as experiencing homelessness and they agree to a housing assessment, they are placed on the Coordinated Entry Housing Priority List.

The Coordinated Entry list provides one way



Affordable Rental Housing-TC RFP

Integrated Supportive Housing Component

Same as
2023

Developer

Property
Management

Supportive
Service
Provider

Funding
Requirements:

WHEDA,
City, etc.

Unit Mix + Architect/Design

Stage: Project Planning & Development

- 3-4+way consultation & collaboration with Property Management, Supportive Service Providers, Developer & Architect to get to the Unit Mix including Bedroom sizes, income limits, etc. FOR the target population(s) identified
- Supportive Housing Units NOT an afterthought

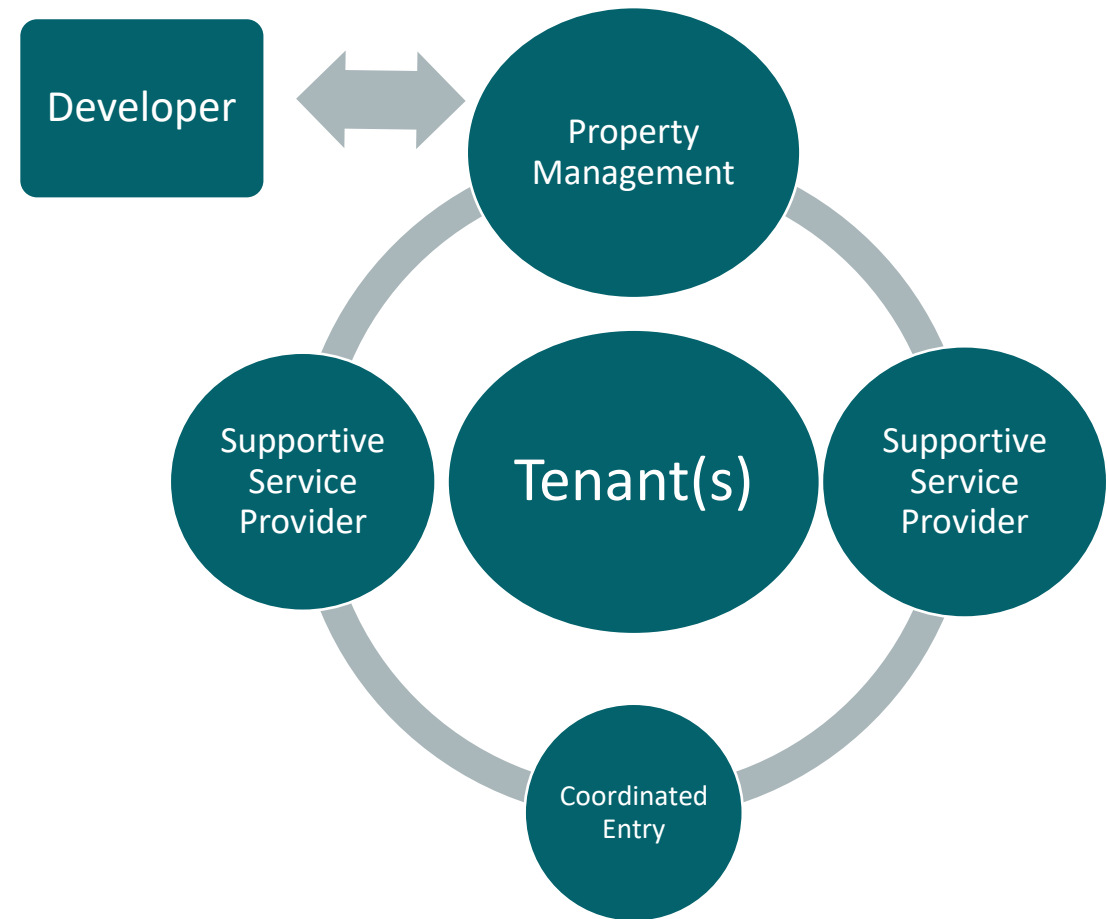
Affordable Rental Housing-TC RFP

Integrated Supportive Housing Component

Same as
2023

Stage: Initial & Ongoing Lease Up Coordination

- Co-design lease up process that works WITH **Service Provider Coordinator and Coordinated Entry** at least 6 months before Certificate of Occupancy (COO)
- Contribute meaningful financial support adequate to serve target population
- Leverage additional & adequate non-City funded dollars
- Review/consult on flexibility of tenant selection criteria for target population



Affordable Rental Housing-TC RFP

Integrated Supportive Housing Component

RFP - Attachment C

Providing supportive services for
Individuals and/or Families Experiencing Homelessness

The Road Home Kristin Rucinski Interim Executive Director kristinr@trhome.org Ph: 608-294-7998 x306	Community Action Coalition for South Central Wisconsin Meghan Mietchen Executive Director meghanm@cacscw.org Ph: 608-206-4333
Housing Initiatives Brad Hinkfuss Executive Director bhinkfuss@housinginitiatives.org Ph: 608-620-1751	Lutheran Social Services of Wisconsin and Upper Michigan Dennis Hanson Vice President dhanson@lsswis.org Ph: 414-246-2711
Madison Street Medicine Brenda Konkel Executive Co-Director brenda@madisonstreetmedicine.org Ph: 608-676-7826	Tellurian Behavioral Health Derek Blum Director of Community and Housing Services dblum@tellurian.org Ph: 608-977-0872
Focus Counseling Calvin Brace Owner/Executive Director info@focuscounselingwi.com Ph: 608-405-2055	Urban Triage Brandi Grayson Founder/CEO bgrayson@urbantriage.org Ph: 608-520-3062
Projects electing WHEDA's Veteran targeting can partner with HUD VASH, which assists Veterans experiencing homelessness with housing case management and a voucher rental subsidy	
HUD VASH Housing Program – William S. Middleton Memorial Veterans Hospital Heather Campbell HUD VASH Housing Coordinator Heather.Campbell3@va.gov Ph: 608-280-2095	

Development Process Summary I

Pre-Application Discussions

City Agency Review

Site Plan Verification

- Pre-Application Meeting w/ Planning & Zoning
- Development Assistance Team (DAT)
- Neighborhood meeting

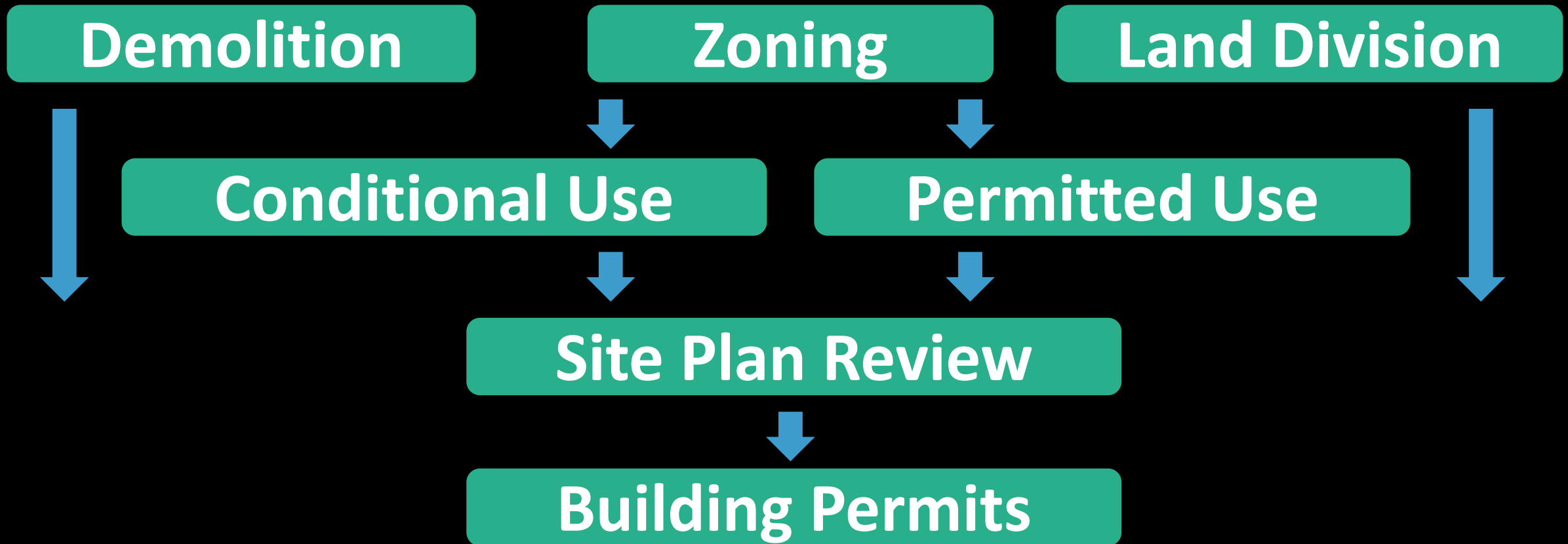
Developer Files Applications

Public Hearings

Permit Issuance



Development Process Summary II



City Review

Land Division (CSM or Plat): 16.23 MGO

Rezoning: 28.182 MGO

Conditional Use: 28.183 MGO

Demolition Permit: 28.185 MGO

Site Plan Review: 28.186 MGO

Planning

Zoning

City Engineering

Traffic Engineering

Parks

Forestry

Mapping

Fire

Water Utility

Metro Transit

Streets & Recycling

Assessor

Real Estate

Police

Parking Utility

2024 DEVELOPMENT REVIEW SCHEDULE for the URBAN DESIGN COMMISSION and PLAN COMMISSION

Please contact the City of Madison's Planning Division at (608) 266-4635 or planning@cityofmadison.com if you have questions about filing your application.

SUBMITTAL DEADLINES (12:00 PM Monday, except as noted):		CORRESPONDING MEETING DATES (as applicable) (Read across row from Submittal Deadline Dates):			Schedule for when only Urban Design Commission (UDC) approval is required or an informational presentation is requested. <ul style="list-style-type: none"> Projects in Urban Design Districts not also requiring Plan Commission approval Comprehensive Design Review and Sign Variances New Buildings or Additions to Existing Buildings Less than 20,000 Square Feet in the Downtown Core (DC) and Urban Mixed-Use (UMX) zoning districts Public Buildings requiring Urban Design Commission approval 		
		URBAN DESIGN COMMISSION (UDC) (When applicable to items in first column) Meetings begin at 4:30 PM, Wednesday	PLAN COMMISSION (For ALL applications listed in left two columns) Meetings begin at 5:30 PM, Monday	COMMON COUNCIL (Zoning Map Amendments, Preliminary Plats, Final Plats and most CSMs) Public hearings begin at 6:45 PM, Tuesday			
October 16, 2023	October 30, 2023	November 29, 2023	December 11, 2023	January 9, 2024	SUBMITTAL DEADLINES (12:00 PM Monday) FOR:	MEETING DATES:	
October 30, 2023	November 27, 2023	December 13, 2023	January 8, 2024	January 23	UDC Approval Required	Informational Presentations	Meetings begin at 4:30 PM, Wednesday
November 27, 2023	December 11, 2023	January 10, 2024	January 22	February 13	November 13, 2023	November 27, 2023	December 13, 2023
December 11, 2023	December 18, 2023	January 24	February 5	February 13	December 11, 2023	December 18, 2023	January 10, 2024
December 18, 2023	January 8, 2024	February 14	February 26	March 5	December 18, 2023	January 8, 2024	January 24
January 8, 2024	January 29	February 28	March 11	March 19	January 8, 2024	January 29	February 14
January 29	February 12	March 13	March 25	April 16	January 29	February 12	February 28
February 12	February 26	March 27	April 8	April 16	February 12	February 26	March 13
February 26	March 25	April 24	May 6	May 21	February 26	March 11	March 27
March 25	April 8	May 8	May 20	June 4	March 25	April 8	April 24
April 8	April 29	May 29	June 10	June 18	April 8	April 22	May 8
April 29	May 13	June 12	June 24	July 2	April 22	May 13	May 29
May 13	May 28 (Tuesday)	June 26	July 8	July 16	May 13	May 28 (Tuesday)	June 12
May 28 (Tuesday)	June 17	July 17	July 29	August 6	May 28 (Tuesday)	June 10	June 26
June 17	July 15	August 14	August 26	September 10	June 10	July 1	July 17
July 15	July 29	August 28	September 9	September 24	June 17	July 15	August 14
July 29	August 12	September 11	September 23	October 8	July 15	July 29	August 28
August 12	August 26	September 25	October 7	October 29	July 29	August 12	August 28
August 26	September 9	October 9	October 21	October 29	August 12	August 26	September 11
September 9	September 23	October 23	November 4	November 26	August 26	September 9	September 25
September 23	October 7	November 6	November 18	November 26	September 9	September 23	October 9
October 7	October 21	November 20	December 2	December 10, 2024	September 23	October 7	October 23
October 21, 2024	November 4, 2024	December 4, 2024	December 16, 2024	January 7, 2025 ³	October 7	October 21	November 6
<p>^{1,2} If considering an alteration to a Planned Development district, please contact Planning staff at planning@cityofmadison.com or (608) 266-4635 to verify which process your proposal requires (i.e. ¹ or ²). ³ Projected 2025 meeting date</p> <p>Use the Land Use Application when filing out the following:</p> <ul style="list-style-type: none"> Zoning Map Amendments, including to the Planned Development (PD) zoning district and All Alterations to Approved PD Districts Conditional Uses Demolition Permits Review of New Buildings or Additions to Existing Buildings <u>Greater than 20,000 Square Feet or Containing Four (4) or More Stories</u> in the Downtown Core (DC) and Urban Mixed-Use (UMX) Zoning Districts <p>Use the Subdivision Application when filing out the following:</p> <ul style="list-style-type: none"> Preliminary and/ or Final Subdivision Plats Certified Survey Maps (CSMs), including any CSM requiring Plan Commission approval Any Plat or CSM in the City's Extraterritorial Plat Approval Jurisdiction (ETJ) **Note: If filing a plat or CSM to accompany a Land Use Application, the plat or CSM shall be submitted concurrently with the land use request using the dates in the first column above and left.** 					<p>A pre-application meeting with staff is required prior to filing any Urban Design Commission Application. Please contact UDC staff at UDCapplications@cityofmadison.com to schedule a pre-application meeting.</p> <p>The Urban Design Commission has established a policy that limits the number of agenda items to fifteen (15). The first fifteen applications received and accepted will be scheduled. Priority is given to applications also scheduled for review by the Plan Commission. Any application beyond the fifteen agenda items will be scheduled for the next regularly scheduled meeting.</p> <p>Urban Design Commission (UDC) Informational Presentations: Informational presentations are scheduled by following the submittal schedule listed above. Space on a particular agenda may be limited and priority will be given to projects requiring a formal UDC action.</p>		
					<p>NOTICE REGARDING LOBBYING ORDINANCE: If you are seeking approval of a development that has over 40,000 sq. ft. of non-residential space, or a residential development of over 10 dwelling units, or if you are seeking assistance from the City with a value of \$10,000 (including grants, loans, TIF or similar assistance), you may be subject to Madison's lobbying ordinance (Sec. 2.40, MGO) and may be required to register and report your lobbying. Please contact the City Clerk's Office for more information (608) 266-4601. Failure to comply with the lobbying ordinance may result in fines.</p>		

Schedule Effective: October 9, 2023



FOCUS ON ENERGY NEW CONSTRUCTION

July 2024



AGENDA



- New construction definition, opportunities, and timing
- Whole-building analysis
 - Benefits
 - Eligibility
 - Process
 - Net Energy Optimizer (NEO®)
 - Incentives
- New Construction Online Tool
- How to enroll and get started



DEFINING NEW CONSTRUCTION



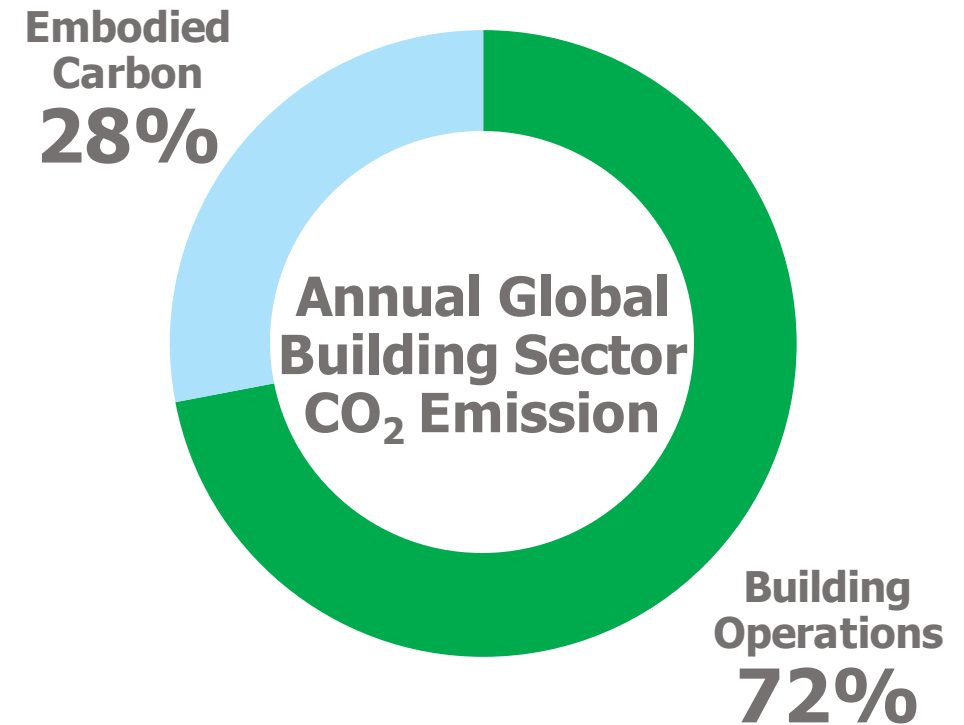
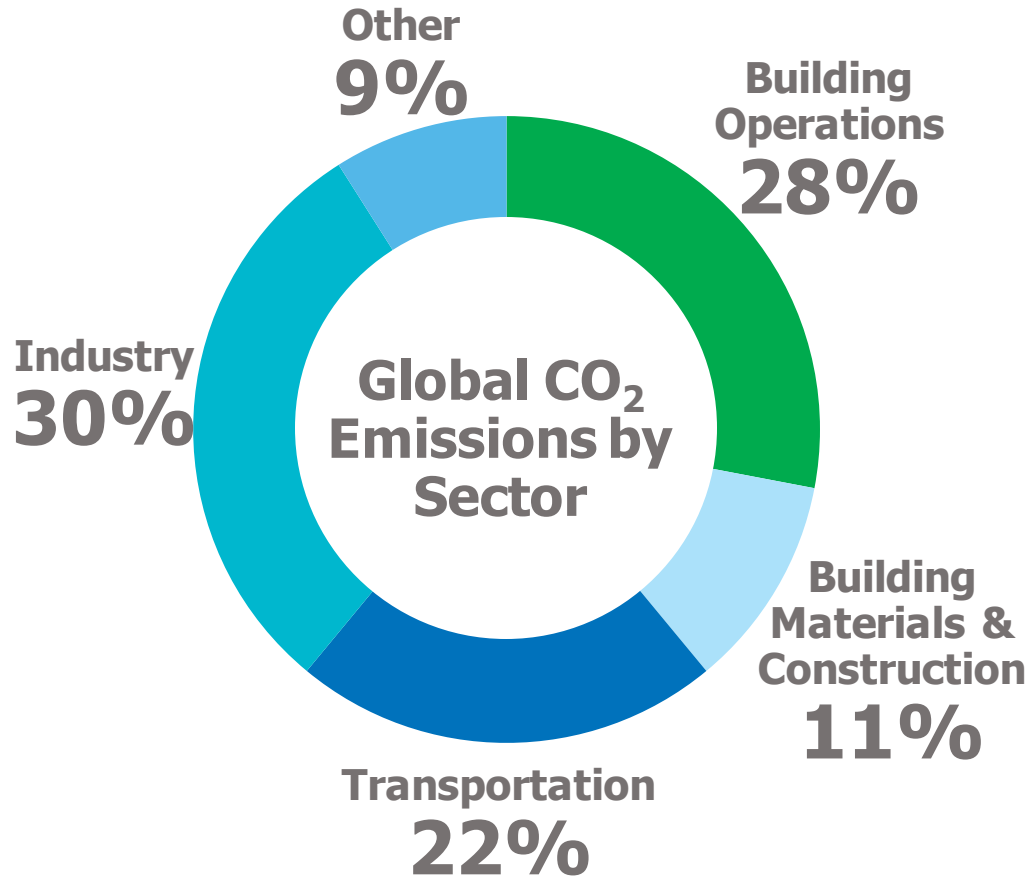
- Project is considered new construction with any of the following:
 - New buildings with site preparation, design, and construction
 - Major renovation undergoing a change of use or adding walls
 - Addition as a significant extension to an existing facility
- Process loads may be included:
 - Regulated process loads (e.g. commercial refrigeration systems) can qualify
 - Custom process measures (e.g. industrial) may be included in the model while qualifying for other incentives

NEW CONSTRUCTION OPPORTUNITIES



- Incentives and technical support available at any step during the design and construction process
 - Energy Design Assistance (EDA) – during early design
 - Best opportunity to maximize energy savings through whole building analysis
 - Energy Design Review (EDR) – later in design
 - Opportunity remains to capture savings through whole building analysis
 - Express EDA (eEDA) - early design through construction completion
 - Opportunity to influence selections

ENERGY EFFICIENCY KEY TO BUILDINGS' CARBON EMISSIONS



Source: Architecture 2030, Data Sources: UN Environment Global Status Report 2017; EIA International Energy Outlook 2017

Source: Architecture 2030, EPA International Energy Outlook

WORKING WITH THE NEW CONSTRUCTION TEAM



- Industry experts for each project
- Project Managers work in conjunction with Energy Advisors



Matthew Jarosz
Program and
Project Manager



Lara Bakker
Project
Manager



Steve Pipson
Project
Manager



**Rebecca
Upham**
Energy Analyst



Tyler Olson
Verification
Specialist



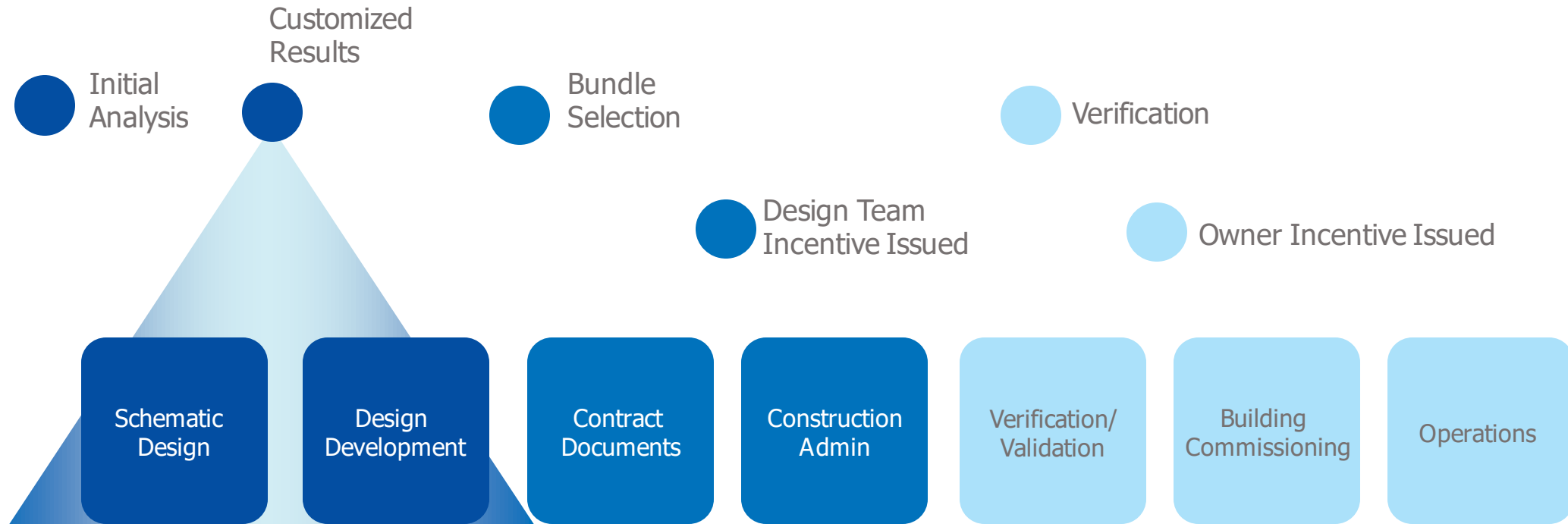
Nathan Lindberg
Verification
Specialist

NEW CONSTRUCTION TIMING



PLANNING AND DESIGN	CONSTRUCTION DOCUMENTS	BIDDING/ ESTIMATING	CONSTRUCTION	MOVE-IN
Perfect timing for incentives	Fewer opportunities available		Prescriptive incentives	Too late if beyond 60 days after occupancy
Energy Design Assistance		Energy Design Review		
Solar Ready Buildings				
Express Energy Design Assistance (eEDA): Multifamily, Warehouse, and Retail				

ANALYSIS PROCESS



WHOLE BUILDING ANALYSIS



- Five Easy Steps

STEP 1



Enrollment

STEP 2



Preliminary Analysis

STEP 3



Final Analysis

STEP 4



Verification

STEP 5



Incentives

ANALYSIS TYPES AND TIMELINES



- NEO: typically four weeks
- Complex (e.g. hospital): typically, six to eight weeks
- Design Team Completed: submittal per project timeline

NEW CONSTRUCTION ONLINE TOOL

"ONE-STOP SHOP"



Commercial & Industrial



Single Family Residential



Mixed Use & Multi-Family



Agriculture



Schools/Gov't



Multi-Building
Development

NEW CONSTRUCTION ONLINE TOOL

ONLINE ENROLLMENT MADE EASY

Welcome

Participants in FOCUS ON ENERGY® can earn anywhere from a few hundred to many thousands of dollars! Answer just a few simple questions and we'll:



Guide you to the nearest
incentive opportunity



Estimate energy savings
and incentives for your
particular situation



Connect you to key
resources

Let's Get Started

🔗 Prefer to talk to a representative? Give us a ring at 800.762.7077! If you run into any trouble whatsoever, you can send us a message via the 'Help' button below.

NEW CONSTRUCTION ONLINE TOOL



- Only basic building information needed
 - Location
 - Construction type
 - Building size
 - Design and construction schedule
- Provides 'one stop shop'
- Anyone on the team can submit an application

ENROLLING YOUR NEW CONSTRUCTION PROJECT



- Complete application through the New Construction Online Tool focusonenergy.com/newconstruction
- Estimated cost savings and incentives provided
- Application confirmation
- Focus on Energy contact will follow up with next steps to begin

Incentives



Investing in energy efficiency for a new building can yield the highest returns on your investment. Focus on Energy incentives and analysis can save more and save smarter.

Annual energy cost savings for your project

up to **\$22,600**

Incentives available

up to **\$15,800**

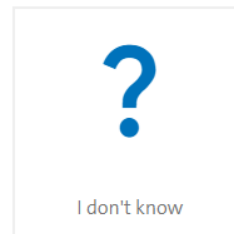
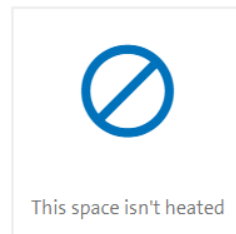
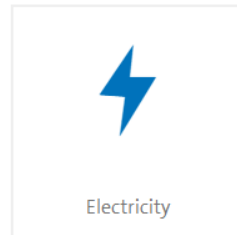
EXPRESS EDA

SELF-SERVE WHOLE BUILDING ANALYSIS



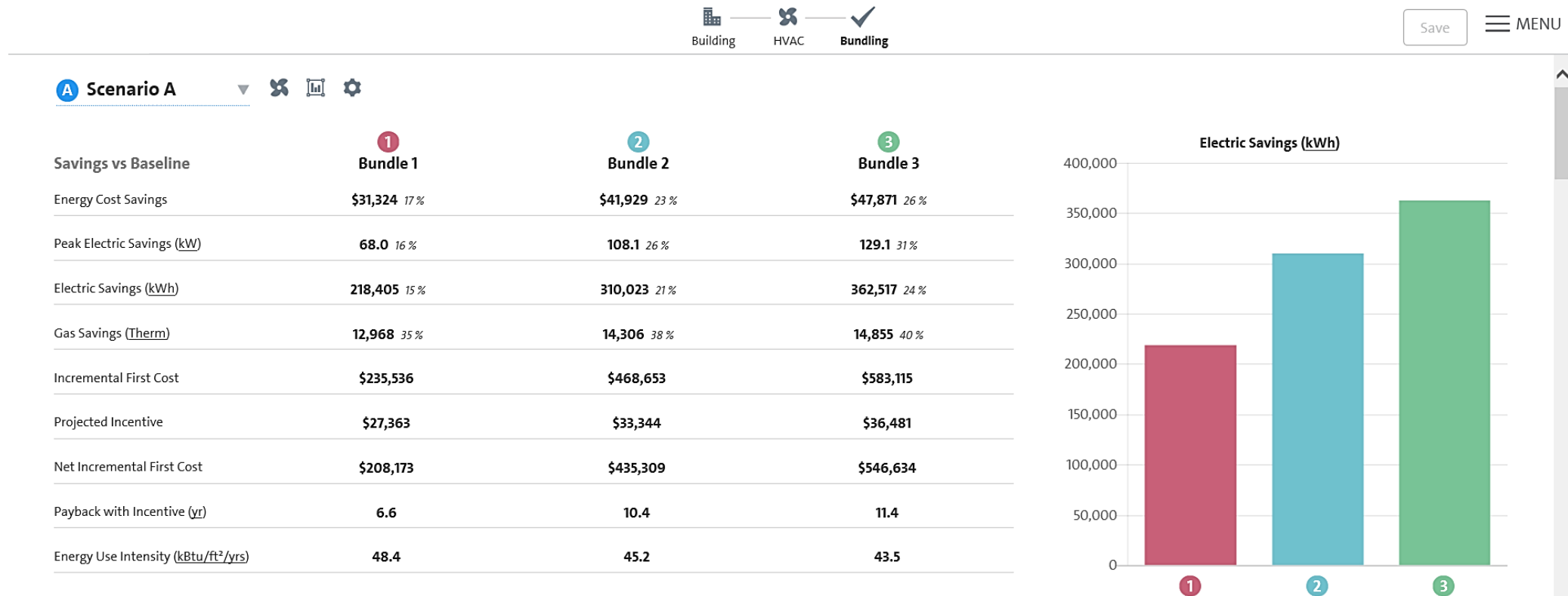
What is the primary heating fuel type in the **warehouse**?

We'll ask about the **office** space later.



ANALYSIS – NET ENERGY OPTIMIZER (NEO)


- Timeline: typically, three to four weeks

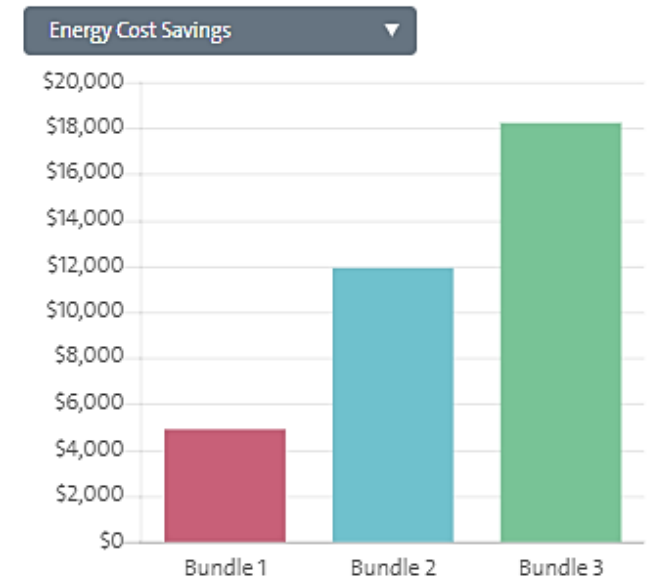


NEO ANALYSIS

Bundle Results

A Scenario A ▼ Calculate 🔗 📄 ⚙️

Savings vs Baseline	1 Bundle 1	2 Bundle 2	3 Bundle 3
 Energy Cost Savings	\$4,880 7%	\$11,934 16%	\$18,205 25%
Peak Electric Savings (kW)	22.9 9%	54.0 20%	74.1 28%
Electric Savings (kWh)	47,261 9%	77,479 14%	111,708 20%
Gas Savings (Therm)	-266 -1%	5,931 24%	10,162 41%
Incremental First Cost	\$74,824	\$202,892	\$345,743
Projected Incentive	\$5,944	\$14,520	\$22,144
Net Incremental First Cost	\$68,880	\$188,372	\$323,599
Payback with Incentive (yr)	14.1	15.8	17.8
Energy Use Intensity (kBtu/ft ² /yrs)	84.3	69.8	59.0



DESIGN TEAM INCENTIVE



- EDA participation results in an incentive paid to the design team

Energy Analysis	Program Provided	Design Team Completed
Incentive	\$0.0075/kWh & \$0.035/therm	\$0.01/kWh & \$0.05/therm



- Pre-qualified design teams can receive 30% more Design Team incentives if they complete an energy model following program guidelines
- Program-provided incentive is capped at \$10,000; Design Team Completed incentive is capped at \$15,000

CONSTRUCTION INCENTIVES



EDA Owner Incentive Rate	\$0.075/kWh and \$0.87/therm
EDR Owner Incentive Rate	\$0.06/kWh and \$0.70/therm
Payback Threshold	1-year minimum
Project Maximum	\$300,000
Customer Annual Maximum	\$400,000



- Focus on Energy will verify net savings impact of all measures prior to issuing an incentive payment

SOLAR READY BUILDINGS INCENTIVE



- \$2,500 to offset the additional costs of modifying building plans to accommodate a future roof-mounted solar system
- Customers participating in the EDA or EDR offering are eligible



WHOLE BUILDING ANALYSIS SUMMARY



- Projects are engaged during the design phase, prior to design decisions being finalized
- Analysis provided for wide range of energy savings options; savings are calculated on a net, whole-building basis
- Focus on Energy provides or guides the analysis, helps pay for design team participation, and reduces upfront costs of energy-saving measures

QUESTIONS?

CONTACT INFORMATION

Thank you!

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Affordable Rental Housing-TC RFP

Scoring Criteria

	Points Available
1. Overall Responsiveness	10 points
2. Development Concept, Planning & Zoning	15 points
3. Proposed Site & Map	15 points
4. Financial Feasibility & Leverage	15 Points
5. Energy Efficiency, Decarbonization & Sustainable Design	10 Points
6. Capacity, Experience & Qualifications: Developer	10 points
7. Capacity, Experience & Qualifications: Service Provider & Property Manager	15 points
8. Alder & Neighborhood Engagement	10 points
Total Points Available	100 points

Affordable Housing Fund–Tax Credit RFP

Pre-Application Process Timeline

July 22nd 2024

Initial City Staff Required Contacts

- Community Development Division (Julie Spears)
- Planning Division (Kevin Firchow)
- Zoning (Jenny Kirchgatter)
- Economic Development Division (if TIF)

August 1st 2024

Applications due by NOON

Additional Required Steps & Contacts

- Focus on Energy New Construction EDA Express Initial App.
- Alder(s)
- Neighborhood Association(s)
- Development Assistance Team (DAT) – Aug 29th (Recommend by August 15th)

Affordable Housing Fund–Tax Credit RFP

Post-Application Process Timeline

Aug. 8	Contact Common Council Office – Debbie Fields – Postcards!!
Aug 19 (week)	CDD Supplemental Info Request
Aug 29	Development Assistance Team Deadline
Aug 29	Neighborhood Meeting Deadline
Sept 3	Supplemental Application Deadline <i>- Focus on Energy – Energy Bundle Reqs – EDA Express</i> <i>- TIF Application, if not sooner</i>
Sept. 9 (week)	Applicant Presentations to Staff

Affordable Housing Fund–Tax Credit RFP

Post-Application Process Timeline

Sept. 12

Applicant Presentations to CDBG Committee

Oct. 7

Land Use Application Due – Zoning Map Amendment

Nov. 4

Land Use Application Due – Permissive Zoning

Nov. 7

CDBG Committee Consideration of Staff Recommendations

Nov. 18

Finance Committee Consideration

Nov. 26

Common Council Approval

Dec 2024/Jan 2025

Commitment Letter (Notification of Award)

Mid 2025-2026

Anticipated Closing/Start of Construction

Application Workshop Questions....



Affordable Housing Fund-TC RFP

City of Madison Community Development Division

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