# CDD Financing Application for Affordable Housing Fund (AHF-TC)

This application form should be used for projects seeking City of Madison AHF-TC funds Request for Proposals #**13059-2024**. *Please format for logical page breaks.* Applications must be submitted electronically to the City of Madison Community Development Division by **noon on August 1, 2024**. Email to: [cddapplications@cityofmadison.com](mailto:cddapplications@cityofmadison.com)

## Applicant INFORMATION

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| Development Name: |  | | | | | | | | |
| Site Address: |  | |  | | |  |  | | |
| Amount of Funds Requested: | $ | | Type of Project: | | | New Construction | Acquisition/Rehab | | |
| Lead Applicant: |  | | | | | | | | |
| Mailing Address: |  | | | | | | | | |
| Telephone: |  | |  | |  | | | | |
| Admin Contact: |  | | Email Address: | |  | | | | |
| Lead Project Contact: |  | | Email Address: | |  | | | | |
| Financial Contact: |  | | Email Address: | |  | | | | |
| Website: |  | | | | | | | | |
| Legal Status of Maj. Owner: | For-profit | Non-profit | | LIHTC Application:  4% only | | | | 4+4% | 9% |
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| Anticipated WHEDA Set-Aside: | General  Preservation  Non-Profit  Supportive Housing | | | | | | | | |
| Federal EIN: |  | | | SAM/ UEI #:\* | |  | | | |

\* If seeking federal funds

## Affirmative Action

If funded, applicant hereby agrees to comply with the City of Madison Ordinance 39.02 and file an Individual Developer Affirmative Action Plan with the Department of Civil Rights. A Model Affirmative Action Plan and instructions are available at <https://www.cityofmadison.com/civil-rights/contract-compliance/affirmative-action-plan/individual-developers>.

**LOBBYING RESIGTRATION**

Notice regarding lobbying ordinance: If you are seeking approval of a development that has over 40,000 gross square feet 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 over $10,000 (this includes grants, loans, TIF, or similar assistance), then you likely are subject to Madison’s lobbying ordinance, sec. 2.40, MGO. **You are required to register and report your lobbying** by registering with the City Clerk’s at <https://www.cityofmadison.com/clerk/lobbyists/lobbyist-registration>. Please consult the City Clerk for more information. Failure to comply with the lobbying ordinance may result in fines of $1,000 to $5,000.

## City of Madison Contracts

If funded, applicant agrees to comply with all applicable local, state and federal provisions. A sample contract that includes standard provisions may be obtained on the Community Development Division Funding Opportunities Website for this RFP.

If funded, the City of Madison reserves the right to negotiate the final terms of a contract with the selected agency.

## Signature OF APPLICANT

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| Enter Name: |  | Date: |  |

By submitting this application, I affirm that the statements and representations are true to the best of my knowledge.

By entering your initials in this box initials you are electronically signing your name as the submitter of the application and agree to the terms listed above.

## Affordable Housing GOALS & OBJECTIVES

1. Please check which of the following goals outlined in the Request for Proposals are met with this proposal:

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, that ensure long-term affordability and sustainability.

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

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

## AFFORDABLE HOUSING Needs, benefit and RISK

1. Please describe the anticipated demand for this specific affordable rental housing in the City of Madison.

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1. Please describe the public benefit of the proposed housing development and the risks associated with the project.

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## PROPOSAL DESCRIPTION

1. Please provide a brief overview of the proposal including key characteristics. Describe how the proposed development will help meet the needs of residents in this location and the impact of the proposed development on the community. (*Please limit response to 300 words including spaces).*

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1. Please describe the following aspects of the proposed development:

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| Type of Construction: | New Construction | Acquisition/Rehab or Preservation |
| Type of Project: | Multi-family | Senior (55+ or 62+ yr. old): |

Total number of units:

Total number affordable of units (≤60% CMI):  Total % affordable of units (≤60% CMI):

Total amount of AHF requested per affordable unit:

Number of units supported by Section 8 project-based vouchers, if known:       PBV CMI level:

1. Please indicate acceptance of the standard loan terms for this proposal as described in Section 1.4 of the RFP.

Yes, I confirm.

1. Applicants requesting alternative loan terms and/or wishing to provide additional information regarding the financing structure or options, please indicate below.

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1. Period of Affordability Commitment:

Permanent Affordability in exchange for a waiver of shared appreciation to the long-term deferred note

40 years – Minimum Commitment

1. Will the development team commit to making annual payments on the AHF Cash Flow Note concurrently with repayment of the deferred developer fee? If yes, explain how this will be memorialized in organizational documents, including the final Amended and Restated Operating Agreement. If not, what year will Cash Flow Payments begin?

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1. Are there any terms of anticipated funding sources anticipated to be incongruent with this RFP? Please explain.

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## SITE INFORMATION

1. Address of Proposed Site:
2. In which of the following areas on the Affordable Housing Targeted Area Map (see Attachment A) is the site proposed located? Please check one of the first three AND Limited Eligibility, if applicable.

Preferred TOD Area

Eligible Core Transit Area

Preservation & Rehab Area (Ineligible for New Construction)

Limited Eligibility Area

1. Identify the neighborhood in which the site is located:
2. Date Site Control Secured:
3. Explain why this site was chosen and how it helps the City to expand affordable housing opportunities in areas of greatest impact. Describe the neighborhood and surrounding community. (Attach a close-up map of the site indicating project location and a second map using the [AHF Targeted Area Map](https://www.cityofmadison.com/dpced/community-development/documents/AHF%202024%20Update%20-%20CC_2024_04_26_v2_0.pdf) to show the site in the context of the City.)

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1. Current zoning of the site:       An interactive version of the Zoning Map can be found linked [here](https://www.arcgis.com/apps/webappviewer/index.html?id=89737c066cda41eea5d986dd71291576).
2. Will the proposed development seek a Zoning Map Amendment:

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| Yes | No, it’s permissively zoned | To be determined |

1. Describe any other necessary planning and zoning-related approvals (conditional use permit, demolition, etc.) that must be obtained for the proposal to move forward.

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1. Describe the proposed project’s consistency with the land use recommendations, goals and objectives as may be relevant in adopted [plans](https://www.cityofmadison.com/dpced/planning/plans/440/), including the City of Madison Comprehensive Plan (adopted 2018), Neighborhood Plans, Special Area Plans, the Generalized Future Land Use Map (interactive version linked [here](https://cityofmadison.maps.arcgis.com/apps/webappviewer/index.html?id=71c4ec1397554f2ab702f2c6c377bb3a)), and any other relevant [plans](https://www.cityofmadison.com/dpced/planning/plans/440/).

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1. If the site is in a Limited Eligibility Area, describe how the relevant concerns will be addressed via design or other strategies, e.g., noise mitigation, air quality, etc.?

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1. Identify the distance the following amenities are from the proposed site. Limit to closest three and/or less than one mile per category. Please limit list to the closest three amenities within one mile per category. Please use the MMSD Find My School [link](https://webapp1.madison.k12.wi.us/webapp3/find-your-school/) as the closest school is not always assigned.

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| **Type of Amenities & Services** | **Name of Facility** | **Distance from Site** (in miles) |
| Full Service Grocery Store |  |  |
| Public Elementary School |  |  |
| Public Middle School |  |  |
| Public High School |  |  |
| Job‐Training Facility, Community College,  or Continuing Education Programs |  |  |
| Childcare |  |  |
| Public Library |  |  |
| Neighborhood or Community Center |  |  |
| Full Service Medical Clinic or Hospital |  |  |
| Pharmacy |  |  |
| Public Park or Hiking/Biking Trail |  |  |
| Banking |  |  |
| Retail |  |  |
| B-cycle Station |  |  |
| Other (list the amenities): |  |  |

1. What is the actual walking distance (in miles) between the proposed site and the nearest seven-day per week [transit stops](https://www.cityofmadison.com/metro) (i.e. weekday and weekends)? List the frequency of service at that bus stop during the weekday at noon. List the bus route(s), major transit stop street intersections and describe any other transit stops (include street intersections and schedule) located near the proposed site. Please do not include full bus schedules.

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1. Describe the walkability of the site and the safest walking routes for children to get to their elementary and middle schools if MMSD [Yellow Bus Service](https://www.madison.k12.wi.us/transportation) is not provided (e.g., less than 1.5 miles and no major roads crossed). Describe the Metro Transit Route for high school students. Enter “N/A” for age restricted (55+) developments.

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1. Describe the transit options for people to access employment and amenities such as childcare, after school activities, grocery stores, the nearest library, neighborhood centers, and other amenities described above.

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1. Describe the impact this housing development will have on the schools in this area. What percent are the 5-year projected capacities for the area schools? Ideal enrollment is considered 90%. Are the schools projected to be at, above, or below capacity? Approximately how many elementary and middle school children are projected to live at the proposed housing development based on the proposed unit mix and previous housing experience? See 5-year projected capacities from 2019 school capacity information found in this [Report](https://resources.finalsite.net/images/v1626108109/madisonk12wius/yl7lrjxerejgxh8z26pv/2019-11_fall_enrollment_reports_updated_on_december_20_2019.pdf) (.pdf pages 30-31). MMSD is in the process of updating this information post-pandemic. Please also e-mail Grady Brown ([kgbrown@madison.k12.wi.us](mailto:kgbrown@madison.k12.wi.us)) to obtain updated current and projected capacity for the relevant schools.

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## SITE AMENITIES

1. Describe the exterior amenities that will be available to tenants and guests (e.g., tot lot or play structure, outdoor exercise equipment, patio, permanent tables and chairs, greenspace, grill area, gardens, etc.).

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1. Describe the interior common area amenities that will be available to tenants and/or guests (e.g., community rooms, exercise room, business center, etc.). For family developments, will there be a year-round indoor play space &/or youth lounge for children and teens?

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1. Describe the interior apartment amenities, including plans for internet service (and cost to tenants, if any) and a non-smoking indoor environment throughout the building.

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1. In regards to parking, what is the:

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| * 1. Anticipated number of total number parking spots: |  |
| * + 1. Underground | -- |
| * + 1. Surface | -- |
| * 1. Ratio of parking spots to units? |  |
| * 1. Monthly parking cost? |  |
| * 1. Will the parking cost in this development vary by CMI level? |  |

Brief further comments regarding parking fees may be added here:

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1. For proposals contemplating first floor commercial space, describe how the use and/or tenant of the space will be a benefit to the immediate neighborhood (e.g. childcare, senior center, community facility, neighborhood-serving commercial etc.). Explain how the use of the space was identified to fill a service gap or enhance the surrounding community. Describe if a prospective tenant or use has already been identified or how a prospective tenant will be found and will help inform the space’s design.

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## City and COmmunity Engagement Processes

1. Briefly summarize the staff comments during your Pre-application meeting with City of Madison Planning and Zoning staff. Please include the date.

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1. Briefly summarize the most notable staff comments made at the City’s Development Assistance Team (DAT) regarding the proposed development and reference the date of the presentation. If this proposal has not yet presented to DAT, what is the anticipated date of the presentation?

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1. Describe the response of the alderperson in which the proposal is located, as well as the adjacent alderperson(s), if within 200 feet of an adjacent [Aldermanic District](https://www.cityofmadison.com/Council/councilMembers/alders.cfm). What issues or concerns with the project did they identify, if any? How will those be addressed?

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1. Describe the neighborhood and community input process to date, including notification to and input from the nearby Neighborhood Association(s). What was the date that the proposal was presented to the neighborhood? If not yet completed, what is the anticipated meeting date? What issues or concerns with the project has been identified, if any? How will those be addressed? Describe the plan for continued neighborhood input on the development (e.g. steering committee, informational meetings, project website, etc.).

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1. Describe your plans for neighborhood informational meetings and other ways of engaging and informing residents both during construction and approaching lease-up. Describe your experience in working with neighborhood residents post-approval and detail effective strategies you have used since the beginning of the pandemic to effectively communicate with residents.

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## DEVELOPMENT TEAM

1. Identify all key roles in your project development team, including any co-developers, property management agent, supportive services provider(s), architect, general contractor, legal counsel, and any other key consultants, if known.

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| --- | --- | --- | --- | --- |
| **Contact Person** | **Company** | **Role in Development** | **E-mail** | **Phone** |
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1. Describe the project’s organizational structure. Please attach an organizational chart detailing the roles of the applicant, all partnerships, ownership and controlling interest percentages of each entity.

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1. Describe briefly the Development Team’s knowledge of and experience in addressing affordable housing needs of the City of Madison. Please be sure to address:
   1. Experience developing multifamily housing for low- and moderate-income households, including:
      1. Experience obtaining and implementing LIHTC, including number, type and location of proposed and completed LIHTC projects and/or affordable housing units your organization has developed.
      2. Experience obtaining and implementing federal, state, city and other financing resources, including number of projects, number of units and location of projects with federal LIHTC, HOME, CDBG, or Section 108 funds.
   2. Developer's experience with, including number of projects, number of units and location developed with integrated supportive housing units.
   3. Leadership/key development team staff qualifications (briefly). Years the organization has been in existence.
   4. Financial capacity of the organization to secure financing and complete the proposed project.
   5. For non-profit organizations and/or co-developers, please describe the organization’s Mission Statement and explain how the proposed development supports the Mission Statement.

Please limit responses to three pages within this application format or enter “See Attached.” Please do not duplicate information here and attached.

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1. For projects that will be co-developed with a non-profit partner, please describe the non-profit’s role in the development. State if the non-profit will have a controlling interest (as memorialized in organizational documents), Right of First Refusal, or General Partner Purchase Option. If not, please elaborate on how the non-profit organization will be involved in the long-term ownership of the development. Describe briefly the compensation structure for non-profit developer, including percentage of the developer fee allocated.

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1. For non-profit applicants interested in federal HOME funds, please describe in detail the development team’s experience using HOME funds, including a list of projects the team has developed using such funds. Is the Non-Profit Organization certified as a CHDO? If not, please indicate interest in CHDO certification. Please enter N/A if this question does not apply.

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1. Who will be responsible for monitoring compliance with federal regulations and requirements during development and construction phases of the project? List past projects they have completed with similar compliance requirements.

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1. Who will be responsible for monitoring compliance with federal regulations and requirements during the Period of Affordability? Please describe the experience of the property management agency including trainings and/or certifications that the individual/property management agency has completed and/or attained.

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1. What other major sources of soft funding are being sought for the proposed development (e.g., TIF, Dane County AHDF, Federal Home Loan Bank Affordable Housing Program, Dane Workforce Housing Fund, etc.)? What is the status of those funds and anticipated commitment dates? Describe the development team’s experience in successfully obtaining funds from the sources sought for the proposed development.

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1. For projects led or co-developed with a BIPOC or minority developer, please explain the BIPOC or minority developer role in the development. State what percentage stake the BIPOC or minority developer will have in the development, development fee split, cash flow, etc. (as memorialized in organizational documents). If the development team will partner with a BIPOC or minority developer, but will not maintain a stake in the organization structure, please explain this decision and elaborate on how the BIPOC or minority developer will be involved in the long-term ownership of the development.

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1. Describe this development team’s experience in or plans to offer a development partnership role, employment or meaningful internship opportunity to a graduate or student of the Associates in Commercial Real Estate (ACRE) program on this or another project?

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1. Please describe the development team’s experience with contracting with Minority- and Women-Owned Business Enterprises (M/WBE). Beyond standard construction bidding practices, what efforts have been made by the development team to ensure that M/WBE businesses are awarded contracts, and what efforts will be made to ensure that M/WBE businesses are given plentiful opportunities to be competitive when bidding on this proposal and awarded a percentage of the contracts that meets or exceeds the City’s **25%** goal as aligned with WHEDA’s EBE program.

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1. Beyond standard construction bidding practices, to what efforts will the development team commit to ensure that women and people of color represent a meaningful share of the construction labor force working on this proposal. Describe how the development team will commit to exceeding the City’s contract labor utilization goal of **13%** for persons of color working on the job site.

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1. For the following development team roles, please identify the number and/or percentage of women and persons of color employed by that company or organization as well as the total employees for each firm.

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|  |  | **BIPOC** | | **Women** | | **Total Employees** |
| **Company** | **Role in Development** | **#** | **%** | **#** | **%** | **#** |
|  | Developer |  |  |  |  |  |
|  | Co-Developer |  |  |  |  |  |
|  | Co-Developer |  |  |  |  |  |
|  | General Contractor |  |  |  |  |  |
|  | Property Manager |  |  |  |  |  |
|  | Architect |  |  |  |  |  |
|  | Service Provider |  |  |  |  |  |

1. Describe the development team’s organizational experience in engaging with the target populations you intend to serve, including black, indigenous, and other people of color. Especially consider operations, design, development, and property management.

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1. Describe ways in which the development team promotes and supports ongoing equity work in internal policy and procedures and within the community and the greater Madison area.

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1. If any team member has acted as a development partner or has any ownership interest in any project currently underway or completed, please list the following information and provide a current status for the team member and/or any related entity, as applicable:
   1. List any foreclosure, default, or bankruptcy within the past ten years.
   2. List any litigation completed, pending, or underway in relation to any financing or construction project within the past five years.
   3. List any Chronic Nuisance Abatement or Nuisance Case notifications issued by Madison Police Department and/or Building Inspection in the past five years
   4. List any unresolved Building Inspection citations resulting in a Municipal Court Complaint in the past five years
   5. List any litigation in the past five years with the City of Madison, including but not limited to Federal, State, or Municipal Court proceedings
   6. List any litigation in the past five years in the State of Wisconsin, including but not limited to Federal, State, or Municipal Court proceedings

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## INTEGRATED SUPPORTIVE HOUSING UNITS

1. Provide the number and percent of Integrated Supportive Housing Units proposed, the income category(ies) targeted for these units, and the target service population(s) proposed (e.g., individuals and/or families currently experiencing homelessness listed on the Community-wide Prioritized List, persons with disabilities, formerly incarcerated individuals, other, etc.).

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1. Provide the number and percent of Veteran Units targeted in the proposed development at or below 60% AMI. How many of the veteran units will be prioritized for veterans experiencing homelessness coordinating with the HUD VASH program listed in Attachment C?

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1. Identify the partnership(s) with supportive service agencies that have been or will be formed to serve the target population(s) for the supportive housing units, including service provider(s) from the Homeless Services Consortium (see Attachment C), if applicable. Provide a detailed description of the type (e.g., assessment and referral, on-site intensive case management, etc.) and level of supportive services (% FTE and ratio of staff: household) that will be provided to residents of the proposed project.

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1. Please describe the proposed integrated supportive housing approach that will go beyond meeting WHEDA’s supportive housing requirements outlined in the Appendix S Checklist of the WHEDA Qualified Allocation Plan targeting veterans and/or persons with disabilities. Please elaborate on the target populations the proposed development will prioritize serving. Describe the consultation and coordination between Developer, the Property Manager and the lead Supportive Service Coordination Agency that occurred prior to this application and planned to design the development in terms of matching unit mix (income and size) to the targeted population.

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1. CDD expects that supportive service partners have access to adequate compensation for the dedicated services provided to residents of the development. In order to ensure the success of the development, the partnership(s), and the tenants, describe the level of financial support to help pay for or subsidize supportive services that the development will provide annually to the identified supportive service partner(s). Identify any other non-City funding sources contemplated or committed for supportive services outside of this project. Explain any arrangement with developer fee sharing, “above the line” payments in the operating budget, “below the line” payments out of available cash flow and/or percent of developer fee shared. CDD is open to deferral of AHF Cash Flow Note payments to ensure meaningful financial support to supportive service partners.

Attach a letter from the Supportive Service Provider(s) **affirming** the services they intend to provide to residents of the supportive housing units, the cost of those services and how those services will be financially supported (i.e., through the development, fundraising, existing program dollars, etc.). Supportive Service Provider should also confirm that they’ve reviewed the projected rents, been given an opportunity to provide feedback and are comfortable with those rents being able to serve the target population.

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## PROPERTY MANAGEMENT: Tenant Selection & affirmative marketing

1. Confirm that Applicant has read and submitted with this application a Tenant Selection Plan consistent with the Standards found in RFP Attachments B-1 and will submit before closing an Affirmative Marketing Plan consistent with the Standards found in RFP Attachments B-2.

Yes, I confirm.

1. Describe the proposed property management entity or partner's experience including number of projects, number of units and location of projects managed. Be sure to address the property management entity's performance experience with and approach to leasing up and coordinating with integrated support services as well as with racially, linguistically, and culturally inclusive property management and marketing practices.

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1. Describe the planned approach, relationship and coordination between the Property Manager and the lead Supportive Service Coordination Agency for lease up and ongoing services. Have these entities previously participated in an in-depth pre-lease up coordination process with these target population(s) in coordination with relevant community partners (e.g., CDA, DCHA, VASH, CE, etc.)? I.e., what is the level of integration of this proposed team with each other– low, medium, high? How will these entities work together to ensure a successful development well-integrated with the immediate neighborhood and community?

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1. Describe the affirmative marketing strategy and any other strategies to engage the target populations for this proposal. How will the Property Manager affirmatively market to populations that will be identified as least likely to apply? Detail specific partnerships that the development team, Property Manager, and/or other agencies in this proposal have had with community agencies and organizations that provide direct housing search and related assistance to households least likely to apply. Please reference successful past practices, relationships with agencies and/or marketing materials used. Specifically outline how this development’s marketing will be consistent with the City of Madison’s Affirmative Marketing Plan Standards (Attachment B-2 of the RFP), especially for Asian and Latinx populations which tend to been under-represented in AHF Completion Reports.

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1. Please address, in detail, experience in and/or plans to implement inclusive and culturally-sensitive property management and marketing practices. Detail specific partnerships that the development team, Property Manager, and/or other agencies in this proposal have had with community agencies and organizations that provide direct housing search and related assistance to households least likely to apply, **especially including undocumented residents and/or residents without social security numbers**. Please reference successful past practices, relationships with organizations that you have partnered with in the past for marketing activities.

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1. Describe your approach to successfully utilizing alternatives to eviction, both pre- and-post filing, such as payment plans, mediation, etc. to avoid evictions.

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1. What percentage of maximum LIHTC rents are used for 50 & 60% units? Households with incomes over 30% CMI, but less than the income to rent ratio required for a 50% unit are frequently locked out of this critical housing resource. What will this proposed development do to serve this segment of the population (e.g., lower rent below 90% of the WHEDA 50% income limit, lower income to rent ratio requirements, provide 40% units to meet demand, etc.)

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1. Describe the proposed development’s policy toward notification of non-renewals. What is the PM’s policy regarding limiting rent increases for lease renewals? How will it be ensured that prospective long-term tenants be protected from significantly and rapidly rising contract rents increases allowed under the published rent limits, even under the rent limit increase requirements in this RFP and Loan Agreement.

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1. Describe any staffing challenges or shortages that the Property Management (PM) company has experienced at the on-site level in the past few years? What will the PM do to address and/or cover on-site staffing challenges at the proposed development should they arise?

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1. What percent of staff turnover has the PM experienced at Madison-area properties in 2023?
2. Divide the number of resignations or terminations in calendar year 2023 by total number of budgeted positions. Explain turnover rate of 20% or more within the regional Property Management staff. Discuss any other noteworthy staff retention issues or policies in place to reduce staff turnover.

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## PROposal TIMELINE

1. Please list the estimated/target completion dates associated with the following activities/benchmarks to illustrate the timeline of how your proposal will be implemented.

| **Activity/Benchmark** | **Estimated Month/Year of Completion** |
| --- | --- |
| Draft Site Plan Ready to Submit to Dev. Assistance Team (DAT) [*Target/Actual Month/Date*] |  |
| 1st Development Assistance Team Meeting (Due by 8/29/24) [*Target/Actual Month/Date*] |  |
| 1st Neighborhood Meeting(Due by 8/29/24)[*Target Month/Date*] |  |
| Submission of Land Use Application (Zoning Map Amendments Due by 10/7/24) |  |
| Submission of Land Use Application (Permissively Zoned Due by 11/4/24) |  |
| Plan Commission Consideration (If Rezoning, 12/2/24 Meeting for 12/10/24 Common Council) |  |
| Urban Design Commission Consideration, if applicable [*Target Month/Date*] |  |
| Application to WHEDA |  |
| Complete Equity & Debt Financing |  |
| Acquisition/Real Estate Closing |  |
| Rehab or New Construction Bid Publishing |  |
| New Construction/Rehab Start |  |
| Begin Lease-Up/Marketing |  |
| New Construction/Rehab Completion |  |
| Certificates(s) of Occupancy Obtained |  |
| Complete Lease-Up |  |
| Request Final AHF Draw |  |

## HOUSING INFORMATION & UNIT MIX

1. Provide the following information for your proposed project. List the property address along with the number of units you are proposing by size, income category, etc. If this is a scattered site proposal, list each address separately with the number of units you are proposing by income category, size, and rent for that particular address and/or phase. Attach additional pages if needed.

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **ADDRESS #1:** | |  | | | | | | | | | |
|  | | **# of Bedrooms** | | | | | **Projected Monthly Unit Rents, 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%** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **40%** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **50%** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **60%** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **Affordable Sub-total** | **0** | **0** | **0** | **0** | **0** | **0** |  |  |  |  |  |
| **80%** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **Market\*** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **Total Units** | **0** | **0** | **0** | **0** | **0** | **0** | Notes/Utility Allowance Assumptions: | | | | |

\*40% = 31-40% CMI; 50% = 41-50% CMI; 60% = 51-60% CMI; 80% = 61-80% CMI; Market = >81% CMI.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Total # of Homeless Supportive Housing**  **Units** | **Total # of Veteran Supportive Housing**  **Units** | **Total # of Homeless Veteran Supportive Housing**  **Units** | **Total # of Disabled/Other Supportive Housing**  **Units** | **Minimum # of Supportive Housing**  **Units** |
|  |  | [   ] |  |  |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **ADDRESS #2:** | |  | | | | | | | | | |
|  | | **# of Bedrooms** | | | | | **Projected Monthly Unit Rents, 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%** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **40%** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **50%** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **60%** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **Affordable Sub-total** | **0** | **0** | **0** | **0** | **0** | **0** |  |  |  |  |  |
| **80%** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **Market\*** | 0 | 0 | 0 | 0 | 0 | 0 |  |  |  |  |  |
| **Total Units** | **0** | **0** | **0** | **0** | **0** | **0** | Notes/Utility Allowance Assumptions: | | | | |

\*40% = 31-40% CMI; 50% = 41-50% CMI; 60% = 51-60% CMI; 80% = 61-80% CMI; Market = >81% CMI.

**NOTE: For proposals contemplating project-based vouchers (PBVs),** please list vouchered units under the same CMI designation that you will be representing to WHEDA (e.g. if the LIHTC application to WHEDA presents 8 PBV units as 50% CMI or 60% CMI units, please include those on the “50%” or “60%” row in the above table(s)). The City of Madison will enforce this income designation in the AHF Loan Agreement, if this proposal is awarded funds. Include a comment in the Notes, e.g., Eight (8) 50% CMI units will have PBVs.

1. Utilities/amenities included in rent:  Water/Sewer  Electric  Gas  Free Internet In-Unit

Washer/Dryer  Other:

1. Please list the source used for calculating utility allowance, and the total utility allowance per bedroom size:

Utilities Allowance Used:  CDA  DCHA  HUSM (HUD HOME)

|  |  |
| --- | --- |
| **Unit Size (Number of Bedrooms)** | **Total Monthly**  **Utility Allowance**  **($)** |
| **Efficiency** |  |
| **1-Bedroom** |  |
| **2-Bedroom** |  |
| **3-Bedroom** |  |

1. Describe this development’s proposed approach to designing the project to maximize accessibility and visitability, including elevator accessible units meeting 100% visitable requirement. Will the proposed project meet the minimum requirements described in the RFP - at least half of the total units must be Type A units or convertible to Type A units as needed. Will the proposed project exceed WHEDA’s minimum accessibility design standards? For rehab, describe the accessibility modifications that will be incorporated into the existing development.

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1. Describe this development’s approach and commitment to the principles of Universal Design. Will the proposed project meet the minimum requirements described in the RFP. Will the proposed project go above and beyond WHEDA’s requirements in any way? Please explain.

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## Energy Efficiency, Renewable Energy, DeCARBONIZATION & Sustainable Design

1. Describe your organization’s experience developing projects that incorporate extraordinary sustainability, energy efficiency, decarbonization/electrification, and/or green building design? Please list any industry standards, third-party certifications or awards achieved on projects developed in the past five years, such as LEED®, WELL, ENERGY STAR Multifamily New Construction Certification, Passive House, etc.

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1. Describe the proposed development’s energy efficiency approach, design and equipment choices. For a rehab project, please refer to Focus on Energy’s [Multifamily Program](https://focusonenergy.com/programs/multifamily-customers).

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1. Check all applicable third-party certifications of Energy Efficiency & Sustainability that will be sought.

|  |  |
| --- | --- |
| **Third-Party Certification** | **YES** |
| Focus on Energy’s Energy Design Assistance program  *(Initial Application submittal confirmation page is attached)* |  |
| Wisconsin Green Built- GOLD Standard |  |
| EPA AirPLUS |  |
| LEED® |  |
| WELL |  |
| ENERGY STAR Multifamily New Construction |  |
| Passive House |  |
| Other: |  |
| Other: |  |

1. Describe how the design of the proposed development will contribute to the City’s [goal](https://www.cityofmadison.com/sustainability/climate) of reaching 100% renewable energy and net-zero carbon emissions community-wide by 2050. Please describe below any other renewable energy systems to be included in the development, such as solar thermal, solar hot water, geothermal, etc.

What size of solar array is anticipated (in Kw)?

What percentage of on-site electricity use is the development aiming to provide via the solar array?

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1. Please indicate sustainable design features and equipment included choices in the proposed development that will help to reduce fossil fuel consumption, achieve decarbonization, and improve air quality:

|  |  |  |
| --- | --- | --- |
| **Sustainability Design Features & Equipment** | **YES** | **Comments** |
| * 1. Air-source or ground source heat pumps |  |  |
| * 1. Electric or heat-pump water heaters |  |  |
| * 1. Electric stoves |  |  |
| * 1. EV charging infrastructure or EV ready design *(exceeding City ordinance requirements)* |  |  |
| * 1. Battery storage |  |  |
| * 1. Other: |  |  |
| * 1. Other: |  |  |

1. Please *briefly* describe the Sustainable Building Design Elements and Strategies that will be incorporated into the proposed project as referenced in the [AIA Framework for Design Excellence](https://www.aia.org/resources/6077668-framework-for-design-excellence), especially the following:
   1. Design for Equitable Communities

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* 1. Design for Energy – Optimized energy use. What is the U value of windows?

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* 1. Design for Water – Describe proposed strategies to protect and conserve water (i.e. water efficiency), reduce reliance on municipal water sources, incorporate systems to recapture and/or reuse water on-site.

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* 1. Design for Resources – Optimize building space and material use

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* 1. Design for Well-being – Consider physical, mental, and emotional well-being, plus trauma-informed design.

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* 1. Design for Ecosystems – Especially indoor environmental quality (IEQ)

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* 1. Design for Change – Optimize operational and maintenance practices

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* 1. Design for Integration, Economy, Change and/or Discovery – Any additional AIA Framework comments

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## REAL ESTATE PROJECT DATA SUMMARY

1. Enter the site address (or addresses if scattered sites) of the proposed housing and answer the questions listed below for each site.

|  | # of Units Prior to Purchase | # of Units Post-Project | # Units Occupied at Time of Purchase | # Biz or Residential Tenants to be Displaced | # of Units Accessible Current? | Number of Units Post-Project Accessible? | Appraised Value Current  (Or Estimated) | Appraised Value After Project Completion  (Or Estimated) | Purchase Price |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Address: | Enter Address 1 | | | | | | | | |
|  |  |  |  |  |  |  |  |  |  |
| Address: | Enter Address 2 | | | | | | | | |
|  |  |  |  |  |  |  |  |  |  |
| Address: | Enter Address 3 | | | | | | | | |
|  |  |  |  |  |  |  |  |  |  |

1. Describe the historical uses of the site. Identify if a Phase I Environmental Site Assessment has been completed and briefly summarize any issues identified. Identify any environmental remediation activities planned, completed, or underway, and/or any existing conditions of environmental significance located on the proposed site.

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1. Identify any existing buildings on the proposed site, noting any that are currently occupied. Describe the planned demolition of any buildings on the site.

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|  |

1. Will any business, including churches and non-profit organizations, or residential tenants (owner or rental) will 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.

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1. For proposals that include rehabilitation, have you completed a capital needs assessment for this property? If so, summarize the scope and cost; Attach a copy of the capital needs assessment.

|  |
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## REFERENCES

1. Please list at least three municipal/financing references who can speak to your work on similar developments completed by your team.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Relationship** | **Email Address** | **Phone** |
|  |  |  |  |
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## WHEDA SELF-SCORE

1. Please provide your estimated **WHEDA self-score** in the table provided. Projects already in receipt of a tax credit award do not need to complete a self-score.

*This self-score is from 2023-2024 QAP. If WHEDA publishes an updated self-score prior to application due date, applicant should revise or replace this table accordingly.*

|  |  |  |
| --- | --- | --- |
| **Scoring Category** | **Max**  **Points** | **Projected Points** |
| 1. Lower-Income  Areas | 5 |  |
| 2.  Energy Efficiency and Sustainability | 25 |  |
| 3.  Mixed-Income Incentive | 12 |  |
| 4. Serves Large Families (Three-bedroom or larger units) | 5 |  |
| 5.  Serves Lowest-Income Residents | 63 |  |
| 6.  Supportive Housing | 15 |  |
| 7. Veterans Housing | 5 |  |
| 8. Rehab/Neighborhood Stabilization | 25 |  |
| 9. Universal Design | 18 |  |
| 10. Financial Leverage | 36 |  |
| 11. Eventual Tenant Ownership | 3 |  |
| 12. Project Team | 8 |  |
| 13. Areas of Economic Opportunity | 28 |  |
| Median Income | *-5-* |  |
| School District (Family-Only) | *-5-* |  |
| High Need Area/Respondent to RFQ | *-5-* |  |
| Avg. Renter Household Paying >30% on Housing | *-5-* |  |
| Access to Services & Amenities | *-10-* |  |
| 14. Rural Areas Without Recent HTC Awards | 8 | **0** |
| 15. Workforce Housing Communities | 12 |  |
| 16. Community Service Facilities | 5 |  |
| **TOTAL** | 273 |  |

**PleASE ATTACH THE FOLLOWING ADDITIONAL INFORMATION AND CHECK THE BOX WHEN ATTACHED:**

1. A completed Application Budget Workbook, showing the City’s proposed financial contribution and all other proposed financing.

2. Description of the Development Team’s Experience and Capacity per Section 2.5, Item 2 of the RFP. This may

be attached or including in the application. Please do NOT duplicate information attached and included in line.

3. Letter(s) from Supportive Service Provider(s) affirming in detail what services are necessary to be adequate for the number of supportive housing units and target population as well as what level of services they intend to provide (such as assessment and referral, on-site intensive case management, etc.), % FTE, hours on site, etc.

4.a. A detailed map of the site.

4.b. A map using the AHF Affordable Housing Targeted Area Map, indicating the site in the context of the City.

4.c. A preliminary site plan and one to two renderings, if available.

5. A Capital Needs Assessment report of the subject property, if the proposal is for a rehabilitation project and if the report is available at the time of application.

6. A confirmation page demonstrating that an Initial Application for Energy Design Assistance was submitted to

Focus on Energy. If the Bundle Report is available, please attach it now as well.

7a. Tenant Selection Plan consistent with the City’s Standards outlined in Attachment B-1.

If the following items are not available at the time of initial application, submittal will be required at the following future date:

|  |  |
| --- | --- |
| **Application Item** | **Due Date** |
| Preliminary Site Plan | A week prior to Development Assistance Team (DAT) |
| Capital Needs Assessment | Supplemental Application |
| Market Study/Analysis – may be informal  *(Required for new construction proposals seeking HOME funds)* | Supplemental Application |