

Inaugural Wisconsin Supportive Housing Institute

Finale
June 23, 2022



WHEDA





Welcome

Elmer Moore

President & CEO, WHEDA

CSH is the national leader in supportive housing. We work to advance Housing Solutions that...



Improve lives of vulnerable
people



Maximize public resources



Build strong, healthy communities

Open Opportunities

June 23, 2022

WHEDA-CSH

Supportive Housing

Institute



PARTNERSHIP

Newcap, Lutheran Social Services and the City of Green Bay have teamed together to create a plan to build a 45-unit affordable housing apartment building consisting of 1 and 2 bedroom units. The site will include 12 units of supportive housing. The proposed sites are all within the City of Green Bay.



MEET THE TEAM



**DEVELOPER
SOCIAL SERVICES
PROVIDER**



PROPERTY MANAGER



PLANNING PARTNER

Mission Statement

To provide housing and supportive services that are affordable, inclusive, and accessible and maximize resources to build healthy communities.

Vision Statement

To provide a safe and supportive environment where people are accepted for who they are, where they are, and can access services that allow them to realize their individual goals and dreams.

Team Core Values

Maximize public resources

Build strong communities

Integrity

Equal access and opportunity

Everyone should be seen, supported, and valued

Treat others and self with dignity, compassion regardless of the color of their skin, backgrounds or story

Help shape the world where color of skin is no longer a factor in one's ability to succeed

Hold ourselves and others accountable

*Our
Mission,
Vision and
Values*

OBSTACLES

RENT BURDEN

According to the Corporation for Supportive housing Blueprint study, 65% of all Green Bay renters are housing cost burdened.

RENTAL SHORTAGE

Currently there is a under supply of rental housing for all but particularly for those most in need of supportive services.

RACIAL INEQUITY

According to the Greater Green Bay Blueprint, those experiencing homelessness in Brown County in March 2021, 33% identified as Black and 16% identified as American Indian or Alaska Native.

SUPPORTIVE HOUSING NEED

The Green Bay Supportive Housing Needs Assessment has recognized that the Greater Green Bay region has a current need for 1,030 additional supportive housing units to meet the current need.

HOMELESSNESS

In 2021, Brown County saw an increase of 30% in people experiencing homelessness according to the yearly Housing and Urban Development System Performance Measure data. According to HMIS Data in March of 2021 there were a total of 1,177 homeless clients served. 83 clients were new to the system, 23 returned to homelessness, and 42 exited to public housing.





BUILD

We will build a 45-unit apartment building with 12 units of permanent supportive housing. Supportive services will be administered using the housing first approach and voluntary intensive case management.

PROVIDE

We will provide tenants with services directly such as outreach, case management, employment and training, access to mainstream resources, and health and mental health care.

RECOGNIZE

We will recognize that subsidized housing should not equal substandard housing.

ACCEPT

We will do everything possible not to reject an applicant on the basis of poor credit or financial history, poor or lack of rental history, or behaviors that are interpreted as indicating a lack of “housing readiness”.

POTENTIAL SITES

FIRST SITE



SECOND SITE



THIRD SITE





SUPPORTIVE SERVICES

By using a Housing First approach we seek to help our tenants stabilize as a first step, thereby subsequently allowing them to focus on skill development aimed at long term housing and personal stability.

ANTICIPATED SERVICE PACKAGE

Physical & Mental Health Services

AODA Counseling

Education/Employment Services

Financial Literacy

Life Skills Education

Whole Family Success Coaching

PROPERTY MANAGEMENT



COMPLIANCE TO FUNDERS

PROVEN MANAGEMENT
EXPERIENCE

PARTICIPATE IN TEAM PLANNING

PROVIDE INPUT ON OPERATING
BUDGET

PROVIDE INPUT ON PROJECT
DESIGN

MANAGE LEASES & UNITS

MARKETING

PROVIDE OUTREACH SERVICES

COLLECT RENTS

LEASE ENFORCEMENT

MAINTAIN PROPERTY

WORK WITH SERVICE PROVIDERS

SOLICIT TENANT FEEDBACK

PROJECT COSTS

DEVELOPMENT

\$14 Million

SUPPORTIVE SERVICES

1.5 staff persons

Estimated Start-up - \$180,000

\$273,000 annually

OPERATING

\$355,000 annually

FUNDING SOURCES



LIHTC EQUITY
INVESTMENT



PERMANENT
LOAN



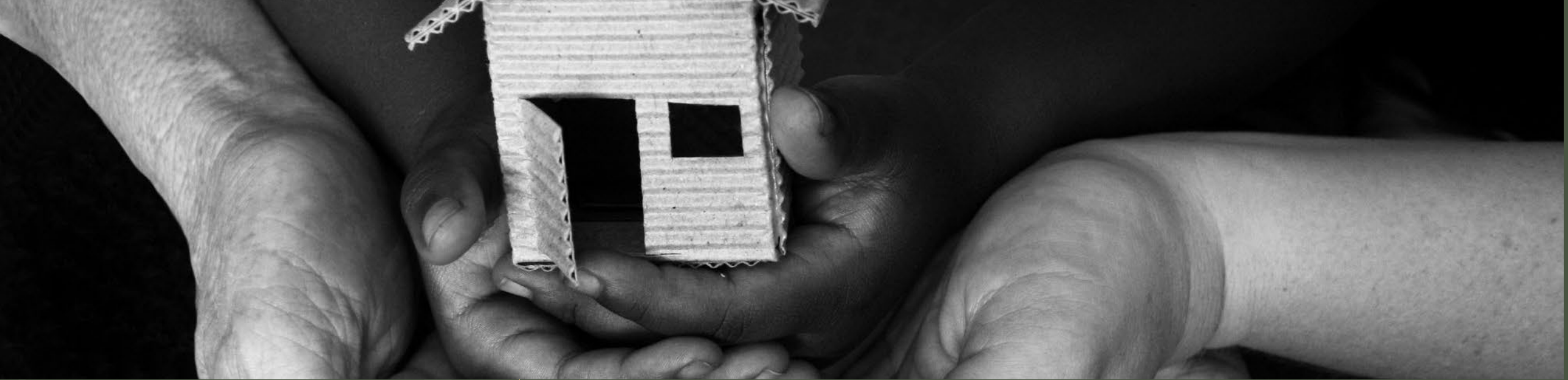
FHL BANK
CHICAGO
AFFORDABLE
HOUSING PROGRAM
(AHP)



HOME RENTAL
HOUSING
DEVELOPMENT
(RHD)



GAP
FUNDING



SUMMARY

The Green Bay Supportive Housing Development Project will be:

Tenant Centered
Accessible
Coordinated
Integrated
Sustainable

The Project Team will work to include those with lived experiences who are part of the identified BIPOC communities in all aspects of the supportive services, project design and housing development.^{4,6}

“Supportive housing improves housing stability; employment; mental and physical health; school attendance; and reduces active substance use. Supportive housing helps people live more stable and productive lives and supports individuals and families to thrive.”

-Katrina Van Valkenburgh, Central Region
Managing Director at CSH

THANK YOU



Questions?

*Inaugural Wisconsin
Supportive Housing Institute*



WHEDA



PORCH HOUSE

Eau Claire, WI

A Permanent Supportive Housing Concept

Finale Presentation

Wisconsin Supportive Housing Institute - CSH/WHEDA

February - June 2022

PORCH HOUSE Team

- ▶ ***Kerry Kincaid***
Owner/Project Sponsor
President Eau Claire Porch, Inc.
- ▶ ***Olivia Buxton***
Property Management
Office Manager/Real Estate broker
Rental Resources of Eau Claire, Inc.
- ▶ ***Michael Carlson/Kate Sullivan***
Developer
VP-Real Estate Development/Real Estate Development Specialist
Impact7
- ▶ ***Katie Hulbert***
Service Provider
Housing & Families Services Director
Western Dairyland Economic Opportunity Council



PORCH HOUSE Mission Statement

Porch House is a practical, safe, and stable place to live for people who face significant barriers to becoming and staying housed.

PORCH HOUSE Concept

- ▶ **Small**

- ▶ **Robust Services**

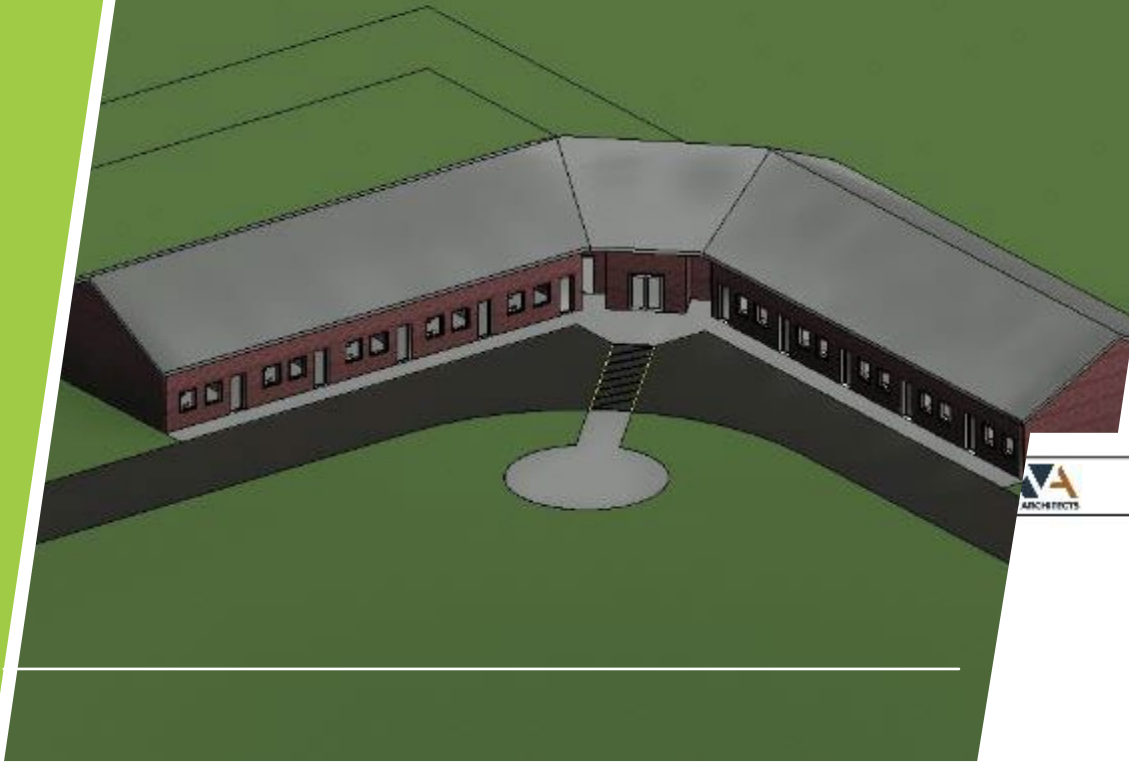
- ▶ Onsite Housing Coordinator

- ▶ **Mission Driven Everything**

- ▶ **Fits the Neighborhood**

- ▶ **Practical . Safe . Stable**

PORCH HOUSE Design



FLOOR PLAN | PORCH H
KENT BAKER ARCHITECTS



PORCH HOUSE Target Population/Services

▶ Population

- ▶ Single adults and couples
- ▶ Integrated - at least half from coordinated entry.
Plus: Veterans. Section 8 waiting list. Agency referrals

▶ Services

- ▶ Mind . Body . Spirit

PORCH HOUSE

Community Support Plan

Engage Public Officials and Housing Professionals

Over-prepare Development Details

Enlist Community Interest Groups

Meet the neighbors



PORCH HOUSE development

- ▶ New Construction
- ▶ (10) 1 BDR units @ 30%AMI
- ▶ Onsite Supportive Services
 - ▶ Development budget assumes onsite services paid from external funding
- ▶ **USES**
 - ▶ \$2.87MM construction hard costs
 - ▶ \$750K project soft and acquisition costs
- ▶ **SOURCES**
 - ▶ \$680K WHEDA or similar Multi-family Permanent financing
 - ▶ \$500K county ARPA funds
 - ▶ \$2.36MM FUNDING GAP (potentially HOME ARPA, FHLB AHP)

PORCH HOUSE Lessons Learned

- ▶ **Must have passion for this work - if you don't you won't last**
 - ▶ **“Full throttle from the start!” Jasmine**
 - ▶ **“Eye opening to talk with people from different fields with a common goal.” Olivia**
 - ▶ **“Supportive housing is difficult to fund outside LIHTC. Absent municipal or private funding, funds are scant.” Michael**
- ▶ **Tenant Centered Housing is grounded on an ethic of adult human dignity**



PORCH HOUSE

Next Steps

- Add members to mission driven team**
- Start a capital funding campaign**
- Buy some land**
- Define the housing coordinator position**

PORCH HOUSE

**a permanent supportive housing concept
Eau Claire, WI**

**THANK YOU WHEDA and CSH
Kerry, Olivia, Michael, Kate, Katie**

Questions?

*Inaugural Wisconsin
Supportive Housing Institute*



WHEDA



Team Elevate MKE

AFFORDABLE. PERMANENT. SUPPORTIVE





Mission statement:

Influenced by the Housing First Model, Elevate MKE will innovatively develop, operate and sustain permanent supportive housing that leads to marked improvement in the lives of those we serve.



**ORIGIN
STORY**

Catapult Wellness LLC is a multidisciplinary Community Social Service agency, offering integrative supportive services to the residents in Milwaukee County, primarily within the areas of 53216 and 53206 where our agency resides.

What our Community Needs:

- Positive Mental Health
- Housing Support/Economic Stability
- Opportunities that are inclusive and fair

Services We Provide:


- Case Management
- Home Visitation
- Housing and Referral/navigation

We found within our Housing, Referral and navigation program an even greater need, a housing program that offered both permanency and support, primarily to those families faced with housing instability.

Housing Statistics

2021 point in time count WI-501 revealed the following

- Currently there are over 200 documented adults with at least one child currently in need of permanent supportive housing in the city of Milwaukee, WI.
- Approximately 14 families have a head of household between the ages of 18-24 and
- 64 families with adults over the age of 24 (point-in-time).
- A total of 124 persons under the age of 18 are living in these households and are reported as unsheltered or sheltered in emergency or transitional housing(point-in-time).



The solution?

PERMANENT SUPPORTIVE
HOUSING!

Original Concept

- Catapult Wellness
 - (Project Lead, SP, PM, Developer and Owner)
- 2053 LLC
 - (Developer and Co-Owner) and Staff
- Small Scattered Site only
- A Continuation of services offered by Catapult (Home visitation model).
- Issues: Need for increased capacity and Competitive Concept

Partnership Changes/ Changed Concept

Meet The Team

ELEVATE MKE



Catapult Wellness
LLC

Service Provider

Co-Developer

Supportive Services Provider

Co-Owner



2053 LLC

Project Co-lead

Co-Developer



Tax Credit
Developer Partner

Project Lead

Lead Developer

Property Manager

Owner



Baker Tilly

Consultant

Project Concept

Target Population: Families

Phase 1

2-3 Bed

30 Units

25% PSH



Phase 2

10-25 Units
(Renovation/Rehab)

3-4 Single Family Units

Or Duplexes/Townhomes

PSH% undetermined



Supportive Services:

Case Management

- Intake and Assessment
- Strengths Based/ICM Model
- Service Planning
- Community Referral
- Group Connections
- Monitoring and Assessment
- Resource Network

Home Visitation

- Supports Families with young children/young HH
- Personal Visits
- Group Connections
- Child Screening
- Resource Network

Peer Support

- Tenant Voice(pre devel)
- Supporting Primary Caregiver
- Encourage and Engage Tenant
- Support during crisis and/or issues with tenancy
- Support throughout tenancy



Community Support Plan

Our Message: Supporting Housing Permanency helps us all!

Public Support

Community Networking:

- Peer Support Staff, Project Lead and Developer

Contacts:

- Alderperson, Community Leaders, Church and Community Center

Method of Contact:

- Open Letter, Public Focus Groups (at each Phase), Open House

Development Timeline:

Original Timeline

- **Pre-Development:**
 - 2022/23
- **Construction:**
 - 2023/24
- **Operation:**
 - 2024/25

New Timeline:



Potential Funding

Pre-Development:

- National Equity Fund
- PNC Bank
- CSH
- Milwaukee County HOME?
- City of Milwaukee HOME
- CDBG

Construction:

- Lisc MKE
- Milwaukee Economic Development Commission
- Northwest Side Community Development Commission

Supportive Services/Operations:

- Housing Authority/Milwaukee County(Tenant Subsidy)
- Medicaid
- Greater Milwaukee Foundation



Lessons Learned & Next Steps

- Establishing Viable Partnerships Early
 - Delegate whenever possible
- Be Patient with everyone, including yourself
- No two projects are the same
- Be flexible, there are many pathways to explore
- Enjoy the ride!
- Determine Site
- Continue partnership search

Questions?

*Inaugural Wisconsin
Supportive Housing Institute*



WHEDA





MKE ALLSTARS
SUPPORTIVE
HOUSING
PROJECT

Milwaukee, WI

TEAM



Travis Spell



Dr. Lakeia Jones



Michael Carlson



Danielle Carrington



AGENDA

- Project Concepts and Details
- Target Population
- Services Offered
- Community Service Plan
- Management Plan
- Potential Funding
- Development Timeline





INTRODUCTION

▶ USES

- ▶ \$9.28MM Construction Hard Costs
- ▶ \$1MM Project Soft and Acquisition Costs
- ▶ \$840k Project Total Paid/Deferred Development/Consultant Fees

▶ SOURCES

- ▶ \$2.6MM WHEDA or Similar Permanent Financing
- ▶ \$1.5MM Combined Municipal/County Sources
- ▶ \$6.4MM 9% LIHTC Equity
- ▶ \$140k Deferred Development Fee

DEVELOPMENT SOURCES AND USES:

New Construction

(40) units total:

(10) @ 30% AMI

(13) @ 50% AMI

(11) @ 60% AMI

(6) @ Market

9% LIHTC @ Supportive Housing Set-aside

Onsite Supportive Services Office

Other amenities to include in-unit laundry,
exercise room and community space

PROJECT DESIGN



LEAD SERVICE PROVIDER



SERVICES TO BE OFFERED:

- ▶ Intake assessment
- ▶ Mental Health Assessment (Individual)
- ▶ Substance Abuse Assessment (Individual)
- ▶ Mental Health Counseling (Individual and Family)
- ▶ Substance Abuse Counseling (Individual and Family)
- ▶ Mental Health Counseling (Monthly Groups)
- ▶ Substance Abuse Counseling (Monthly Groups)
- ▶ Support Groups (Monthly)
- ▶ Case management/ Care Coordinator (Ongoing)
- ▶ Crisis intervention (Ongoing)
- ▶ Mentoring (Monthly)
- ▶ Peer mentoring (Monthly)
- ▶ Tutoring and Academic Services (Monthly)
- ▶ Daily Living Skills/ Individualized skill development groups (Monthly)
- ▶ Employment and Financial Literacy Groups (Monthly)
- ▶ Cooking and Nutrition (Monthly)
- ▶ Resident only events (Monthly)
- ▶ Collaboration events (Monthly)
- ▶ Fitness (Ongoing)
- ▶ Food and Clothes Pantry
- ▶ Medical (As needed)
- ▶ Grooming services such as barber shop/ salon (Monthly)
- ▶ Referrals to other services and programs (Ongoing)
- ▶ Recreation and socialization events- (Monthly)
- ▶ Legal Assistance (As needed)
- ▶ Delivery Pharmacy Services (As needed)
- ▶ Interpreter Services (As needed)

- ▶ ****Individual services will be scheduled with the tenant to ensure appointment times that work best for the tenant.
- ▶ ****Monthly services, groups, all other services, and events will be listed on the community calendar.
- ▶ ****No services are mandated. They are optional

SERVICE PROVIDER

FUNDING FOR SUPPORTIVE SERVICES:

- ▶ Medical Insurances such as Medicaid, Medicare, Family care
- ▶ Community Care and private insurance carriers
- ▶ IRIS Funding
- ▶ Milwaukee County CCS Funding
- ▶ Milwaukee County Cars
- AODA Funding
- ▶ Milwaukee County Behavioral Health Division
- ▶ Milwaukee County Health and Human Services
- ▶ Other Milwaukee County, State and Federal Funding
- ▶ Donors

Where are services delivered:

- ▶ In-home (On-site)
- ▶ In-office (clinic or agency sites)
- ▶ Telehealth (Phone or Video)
- ▶ In the community (Mobile Approach)
- ▶ Community Base Approach (Outside Agency Referral-Outsourced)

Tenants Sign up for services:

- ▶ On the Website
- ▶ Email
- ▶ Phone
- ▶ Text
- ▶ On-site
- ▶ Through Care Coordination

Team

Getting the community involved through...

- ▶ Hiring Marketing Manager
- ▶ Media, news, press release, social media, website, door-to-door, calling, emailing, monthly newsletters, meetings, hosting community forums, information sessions, listening sessions and more via zoom and in person.

- Begins immediately after marketing for the project is decimated
- Lease up and Fair Housing practices coincide
 - Screening
 - Unit Choice
 - Accommodations
- Move in collaboration between management and service coordination
- Follow up opportunities through continuing education
 - Understanding my lease & community rules
 - Tenant disputes & management complaints processes
 - Timely work orders vs reasonable accommodations
 - Renters insurance
 - Eviction prevention balance
 - LIHTC recertification over, under & rules to stay eligible
- Responsiveness fostering a community and culture

MANAGEMENT PLAN

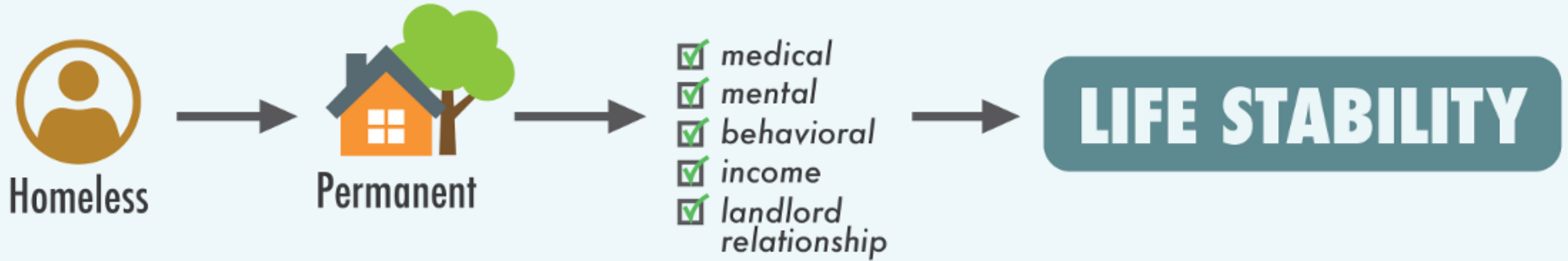


DEVELOPMENT TIMELINE:

INSTITUTE TEAM LESSONS



HOUSING FIRST



NEXT STEPS

- Alderman
- Local BID
- Banks and credit unions as well as other funders
- DWD
- Local governments
- Zoning
- Milwaukee County Behavioral Health Division
- Milwaukee County Health and Human Services



THANK YOU

Travis Spell

travis@tspelldevelopmentgroup.com

www.tspelldevelopmentgroup.com



MKE ALLSTARS



Questions?

*Inaugural Wisconsin
Supportive Housing Institute*



WHEDA



Hope to Homes Partners

KG Development Group
Partners for Community
Development
KPH Construction
Care Management



Supportive Housing w/ Transformative Approach

“THE UTILIZATION OF HOUSING AND SERVICE COMPONENT AS THE FIRST TREATMENT AND BASES FOR BUILDING DESIGN, PHYSICAL HEALTH, MENTAL HEALTH, SOCIAL HEALTH, AND FINANCIAL HEALTH. THESE INTEGRATIVE SUPPORT MECHANISMS SUPPORT THE OVERALL WELLNESS OF OUR RESIDENTS”.

Overview of Project

The effort to have integrative supportive surface will not be an after-thought, but as intentional as the physical design and engineering.

Granville Commons will provide support, foster community, and inclusivity of all abilities.

This development will make inclusivity not just a word but a place to live.

- ★ The development is in the heart of the Granville neighborhood of the city of Milwaukee, and the development aims to be an integral part of the areas continued revitalization.
- ★ The developer has site control of approximately 1.6 acres (71,752sf).
- ★ The site is zoned multifamily, that we can create a rental mix to be inclusive of supportive units, family units, as well as, typical 1-2 bedroom units.
- ★ The property is accessible by public transportation, as well as parks and other public services.
- ★ There will be a proposed 12 units at 60% AMI, 18 units at 50% AMI, 12 units, at 30% AMI, and 8 market rate units.
- ★ The development will be conscious of having mechanism to foster integrated supportive programming.

KG Development Group

KG is a leader in the Transformative housing space. We are committed to providing Healthy Housing which includes :

Affordable accommodations

Quality and efficient building Materials and Systems

Supportive Health Care and outreach

Integrative Services

KG Development Group Values

Respect - We create a space where the voices of others are welcomed and encouraged. We first seek to understand and learn as we establish trust.

Excellence - We promise to always provide quality work and ensure the satisfaction of our clients and stakeholders.

Authenticity - We act with honesty, integrity, and transparency-understanding that our clients' trust is of the utmost importance.

Loyalty - We promise to remain true to who we are-staying committed to our mission and our stakeholders.

Partners for Community Development (P4CD)

*“A housing and
home efficiency
expert.”*

Established in 1975

Partners for Community Development is a local nonprofit that provides:

Residential energy conservation experts

Housing rehabilitation & home buying assistance

Affordable housing that is WHEDA and HUD certified

Tri-lingual services

Video: <https://youtu.be/svPYpHb2b4o>

KPH Construction

Established in 1999

Specializing in Healthcare, Education, Historic Restoration, Housing, and Environmental

A trusted contractor to the private sector as well as to city, state and federal agencies

The only full-service contractor in Wisconsin certified as a HUBZone Small Business

Experienced development partner in housing and LIHTC projects

Project Detail

Three Stories

50 units

Surface parking

On-site Transportation

Uber/Lyft Stalls

Rain Garden

Bench sitting for Uber/Lyft/Bus

Mobile Grocery Store







Community Support

| NO. | NAME | PHONE (HOME) | PHONE (CELL) | EMAIL | ADDRESS | DATE | SIGNATURE |
|-----|-------------------|----------------|--------------|-------|--------------|--------|-------------------|
| 1 | Dezmonae Williams | (414) 931-1127 | | | 7935 N 64th | 6/7/21 | Dezmonae Williams |
| 2 | Diana Smith | 262-347-8746 | | | 7907A | 6/7/21 | Diana Smith |
| 3 | Angela Felt | 414-364-3678 | | | | 6/7/21 | Angela Felt |
| 4 | Corena Jonhara | (414) 379-4873 | | | 7915A N 64th | 6/7/21 | Corena Jonhara |
| 5 | Connie Kennedy | 414-303-7058 | | | 7919A N 64th | 6/7/21 | Connie Kennedy |
| 6 | Cipora Stewart | 414-539-9373 | | | 7921 N 64th | 6/7/21 | Cipora Stewart |
| 7 | Joso Cuellan | 262-923-0342 | | | 7819 N 64th | 6/7/21 | Joso Cuellan |
| 8 | Delia Handley | | 212-595-9275 | | 7819A N 64th | 6-7-21 | Delia Handley |
| 9 | Shirley Wilkin | 262-717-5741 | | | 7800 N 64th | 6/7/21 | Shirley Wilkin |
| 10 | Deborah Kramer | 414-915-3608 | | | 7806 N 64th | 6/7/21 | Deborah Kramer |
| 11 | Mariasha Kainert | | | | 7818 N 64th | 6/7/21 | Mariasha Kainert |
| 12 | Danielle Davidson | | | | | 6/7/21 | Danielle Davidson |
| 13 | Lisa Marks | 584-872-5821 | | | 7836A N 64th | 6/7/21 | Lisa Marks |
| 14 | Shula Smith | | | | | 6/7/21 | Shula Smith |
| 15 | Kawtha Weeks | 1111-577-5073 | | | | 6/7/21 | Kawtha Weeks |

| NO. | NAME | PHONE (HOME) | PHONE (CELL) | EMAIL | ADDRESS | DATE | SIGNATURE |
|-----|-------------------|----------------|----------------|-------|---------|-------------|-------------------|
| 16 | Jovanika | | (414) 252-3324 | | 7926A | June 7 2021 | Jovanika |
| 17 | Lisa | | | | 7925 | June 7 2021 | Lisa |
| 18 | Lisa | | | | 7950A | June 7 2021 | Lisa |
| 19 | Rodney | | | | | | Rodney |
| 20 | Tiana Edwards | (773) 796 0702 | | | 7920 | | Tiana Edwards |
| 21 | Carrie | | | | 7922 | | Carrie |
| 22 | Melinda | | | | 7934 | | Melinda |
| 23 | Ladon Harrell | 517 4913 | | | 7941A | 6/7/21 | Ladon Harrell |
| 24 | Sherylone Anthony | 7945A N 64th | | | | 6/7/21 | Sherylone Anthony |
| 25 | Jessica Patterson | (414) 215-5735 | | | 794A | 6/7/21 | Jessica Patterson |
| 26 | Brittany | | | | | 6/7/21 | Brittany |
| 27 | Jay | 414 216 1519 | | | 7953A | 6/7/21 | Jay |
| 28 | Marilyn McElroy | 414-467-3027 | | | 7671 | 6/7/21 | Marilyn McElroy |
| 29 | Stacy Riechers | | | | | 6/7/21 | Stacy Riechers |
| 30 | | | | | | 6/7/21 | |

| NO. | NAME | PHONE (HOME) | PHONE (CELL) | EMAIL | ADDRESS | DATE | SIGNATURE |
|-----|-------------------|----------------|--------------|-------|----------------|--------|-------------------|
| 1 | Kenny G. | 414 72 9133 | | | 683 W Bradley | | Kenny G. |
| 2 | Yvette E. | (414) 469-6152 | | | 6219 W Bradley | | Yvette E. |
| 3 | Jessie Williams | (414) 702-9419 | | | 6314 W Bradley | | Jessie Williams |
| 4 | Darnisha Toliver | (414) 699-7604 | | | 2577 N. 395th | | Darnisha Toliver |
| 5 | Joseph Birmingham | (414) 526-3232 | | | 0319 W Bradley | 5/3/23 | Joseph Birmingham |
| 6 | Darshon Townes | 414-391-263 | | | 7999 N 64th | | Darshon Townes |
| 7 | Sherry Kaplan | | | | 7950 N 64th | | Sherry Kaplan |
| 8 | Debra David | 608 520 8477 | | | 7948 N 64th | 6-7-21 | Debra David |
| 9 | Rosa Sibaja | 414-737-7549 | | | 7954 N 64th | | Rosa Sibaja |
| 10 | Cherise Rayford | 414-797-0797 | | | 7956 N 64th | 6/7/21 | Cherise Rayford |
| 11 | Tatisha Thurmond | 262-573-0977 | | | 7916 N 64th | 6/7/21 | Tatisha Thurmond |
| 12 | Nellie Adams | 414-324-2101 | | | 7922 N 64th | 6/7/21 | Nellie Adams |
| 13 | Jeffrey Yang | 262-422-0866 | | | 7914 N 64th | 6/7/21 | Jeffrey Yang |
| 14 | Ethel Lewis | | | | 7908 N 64th | 6/7/21 | Ethel Lewis |
| 15 | Shikita Lumpkins | (414) 722-5321 | | | 4924th N. 64th | 6/7/21 | Shikita Lumpkins |

| NO. | NAME | PHONE (HOME) | PHONE (CELL) | EMAIL | ADDRESS | DATE | SIGNATURE |
|-----|--------------------|----------------|---------------|-------------------|-------------|------|--------------------|
| 16 | Syllisha Clendenen | (414) 659-9992 | | | 7907 N 64th | | Syllisha Clendenen |
| 17 | Tracye | N/A | (414) 2070701 | | 7911 N 64th | | Tracye |
| 18 | Echols | | | | 7947 N 64th | | Echols |
| 19 | Chonammy WINS | 414 215 5848 | | | 7945 N 64th | | Chonammy WINS |
| 20 | Tom Lindert | 414-426-6153 | | t.lindert@nac.com | | | Tom Lindert |
| 21 | | | | | | | |
| 22 | | | | | | | |
| 23 | | | | | | | |
| 24 | | | | | | | |
| 25 | | | | | | | |

Chronic Health

People with chronic illness in supportive housing can potentially reduce their use of costly systems, especially emergency health care and corrections through the integration of case management that focuses both on primary care, and other social determinants of wellness.

Varied Intellectual Abilities

Supportive housing helps people with varied intellectual abilities live stably in the community, by providing daily living skills support, as well as independent activities of daily living needs assessments, and support based on individual needs.

Fatherhood Initiative

People in other groups, such as single fathers and families trying to keep their children out of foster care, likely also benefit from supportive housing through our transformative housing model, where our services meet you where your needs are.

At-Risk of Homelessness

The Transformative Housing approach combines affordable housing assistance with voluntary support services to address at-risk homeless individuals.

The services are designed to build independent living and tenancy skills and connect people with community-based health care, treatment and employment services.

Green Building Design

A 'green' building is a building that, in its design, construction or operation, reduces or eliminates negative impacts, and can create positive impacts, on our climate and natural environment. Green buildings preserve precious natural resources and improve our quality of life.

There are a number of features which can make a building 'green'. These include:

- Efficient use of energy, water and other resources
- Use of renewable energy, such as solar energy
- Pollution and waste reduction measures, and the enabling of re-use and recycling
- Good indoor environmental air quality
- Use of materials that are non-toxic, ethical and sustainable
- Consideration of the environment in design, construction and operation
- Consideration of the quality of life of occupants in design, construction and operation
- A design that enables adaptation to a changing environment

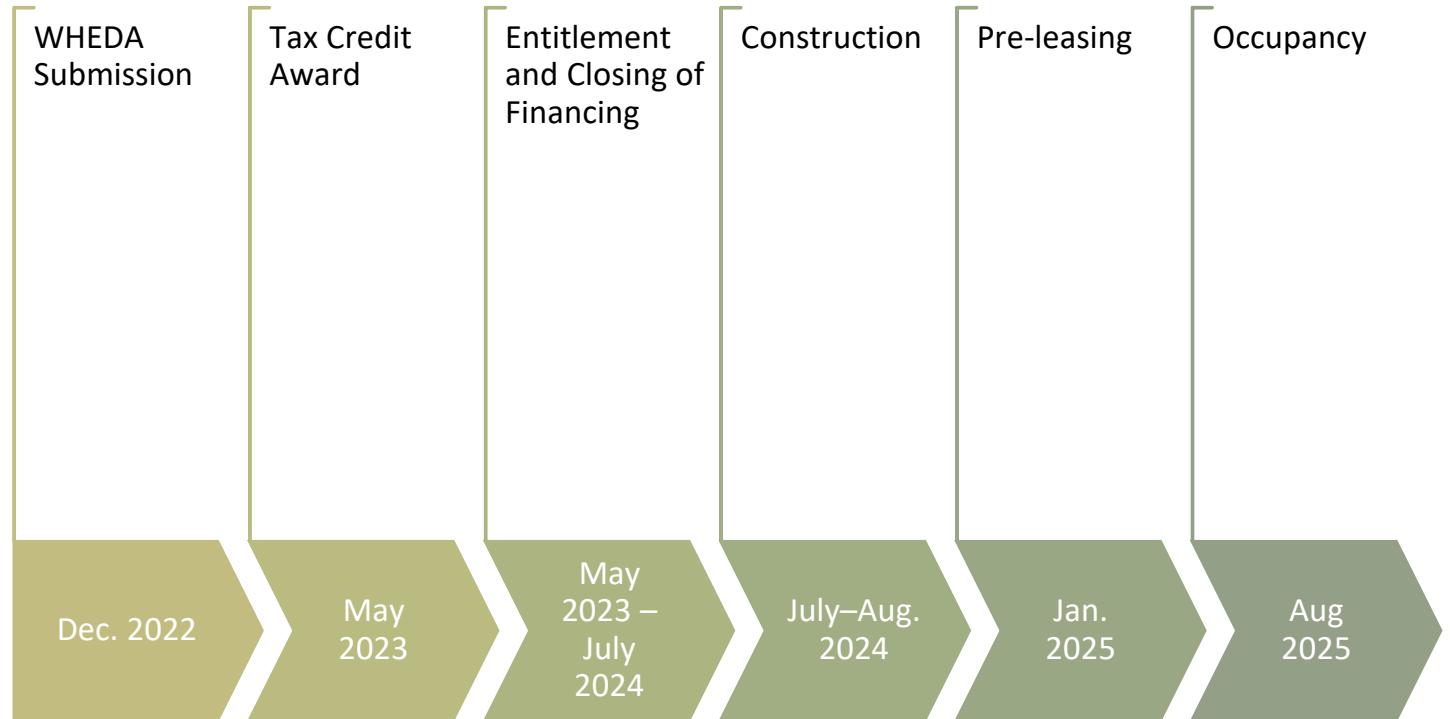
Project Budget

- Total Development Cost - \$14,819,784
- 106 new jobs during construction
- 25 retained jobs via direct and indirect spending impacts
- MBE/SBE participation – Legal, Accounting, Marketing, Communications, Subcontractors

Potential Operating and Service Funding

- Housing Choice - Rental
- HUD VASH - Rental
- Shelter Plus – Rental
- Project Based Vouchers - Rental
- Medicaid (Service/Family care)
- County Specific Emergency Funding – (Rental)

Development Timeline



Project Contacts

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Questions?

*Inaugural Wisconsin
Supportive Housing Institute*



WHEDA



Sense of Homes



- Team members
 - Deaira Rodman
 - Dave Rajkovich
 - Derek Moran
 - Hayden Frank
 - Heather Yaeger
- Lutheran Social Services of Wisconsin & Upper Michigan (LSS)
 - Property Manager
 - Supportive Service Provider
- Alternative Continuum of Care (ACC)
 - Developer

Sense of Homes – Proposed Development

- Location – Milwaukee, WI
- 40 – 50 Apartments
 - Mix of 1, 2 and 3-bedroom units



Target Population

- Two Units for adolescents aging out of foster care.
- Ten additional units for individuals off the homelessness coordinated entry list.
- The balance of the units are affordable based on county median income.

Why this Population?

- 23,000 children will age out of foster care system in the U.S every year. In Wisconsin, of 4,452 youth in foster care, 281, or 6.3% will aged out of foster care in 2020. If, Wisconsin is consistent with the National averages that means 56 youth will experience homelessness once they age out of Foster Care. Additionally, one in four youth who age out of the system into homelessness develop a substance abuse disorder.
- 4,515 experiencing homelessness on any given day
 - 558 were family households
 - 337 were Veterans
 - 193 were unaccompanied young adults
 - 611 were individuals experiencing chronic homelessness

Role of a Service Coordinator

- Service Facilitator
- Investigator
- Educator
- Community Builder
- Advocate



Onsite Services Provided

- Offer information and referrals in the following areas:
- Adult Education
- Financial Literacy
- Employment Services
- Health and Government Benefits
- Coordinate and host
- Educational presentations
- Workshops
- Wellness opportunities
- Establish key community partnerships

All services are voluntary

Service Coordinators do not:

- Provide direct cares/services
- Coordinate activities
- Duplicate existing community services
- Distribute medications or medical advice
- Manage resident funds
- Manage or enforce resident's lease
- Transport residents

Areas of Services Provided

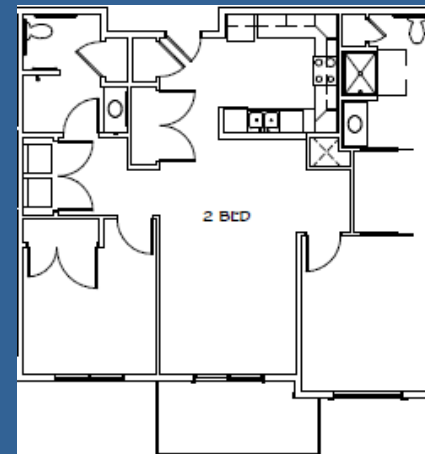
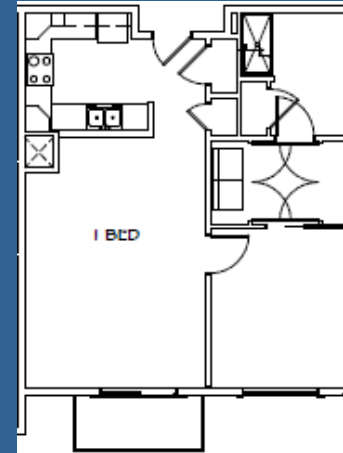
| | | |
|-------------------------------|------------------------------|----------------------------------|
| Advocacy | Food and Nutrition | Outreach |
| Assessments | Health Care Services | Need Evaluations |
| Benefits/Entitlement Services | Household Skills/Life Skills | Substance Abuse |
| Conflict Resolution | Housing and Lease Education | Support Counseling |
| Education and Employment | Independent Living | Tax Preparation |
| Tenant Rights | Isolation Intervention | Translation Services |
| Family Support | Legal Assistance | Transportation |
| Financial Education | Mental Health | Adult Personal Assistance (ADLs) |

Benefits and Goals

- Safe and secure housing
- Intake meeting: tenant goals
- Increase length of residency
- Decrease evictions/turnovers
- Improve education and job opportunities
- Increase income or access to financial assistance

Design Features

- Lived-in tenant input to assist with apartment layouts
- Multipurpose community rooms
- Overall development designed to blend in with area surroundings and tying back into the local community



Milestone Schedule

- December 2022 – LIHTC Application
- Spring/Summer 2023 – Grant applications and Awards
- Summer 2023 – Project Design/ Budgeting
- Fall 2023 – Groundbreaking for construction
 - 12 Month construction period
- Occupancy in Fall 2024



Next Steps

- **Confirm site location**
 - Complete conceptual design and obtain zoning approvals

- **Finalize funding sources for initial development and on-going services**

Questions?

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Introductions





Capital Group



*Dave Porterfield
Movin' Out
Senior Advisor*



*Brad Hinkfuss
Housing Initiatives
Executive Director*



Movin' Out's Mission

Movin' Out, in partnership with people with disabilities and their allies, creates and sustains community-integrated, safe, affordable housing solutions.





Who is Movin' Out?

- ❖ A state-wide nonprofit housing organization.
- ❖ We assist households with both home ownership and affordable rental opportunities.
- ❖ We provide specialized housing counseling to assist households to create and carry out a housing plan.
- ❖ We own and operate over 250 units of community-integrated, affordable, barrier free rental housing.
- ❖ We have developed 18 community development projects and are owners or co-owners of over 1,200 multi-family units.
- ❖ We are committed to long term ownership by preserving affordability for 30+ years.

Housing Initiatives' Mission

Housing Initiatives exists to provide permanent housing for persons in Dane County who have a severe and persistent mental illness and are experiencing homelessness because of the illness.





Who is Housing Initiatives?

Housing Initiatives is the only organization in Madison that focuses exclusively on ending homelessness for our neighbors who suffer from severe mental illness. Our model is highly successful, with 95% of Housing Initiatives clients never returning to homelessness.

- ❖ Housing Initiatives was established as a non-profit 501(c)3 org 28 years ago
- ❖ 33 properties scattered in established neighborhoods throughout Madison
- ❖ 151 apartment units, plus additional units rented from private landlords
- ❖ A property owner coupled with a supportive service provider
- ❖ That mission has evolved to draw heavily on coordinated entry, homeless veterans, and other homeless & mentally ill clients who work with other organizations

Common Ground

- ❖ In 2018, Movin' Out had a portfolio of single family homes that needed repairs but didn't have enough units to utilize LIHTC financing. So we started to seek a mutually beneficial partnership.
- ❖ Housing Initiatives has many scattered site properties that could benefit from renovation. Due to a well-established supportive service program with Coordinated Entry in the Dane County Continuum of Care, Housing Initiatives will partner that expertise with Movin' Out's LIHTC expertise to collaborate on redeveloping 71 units.

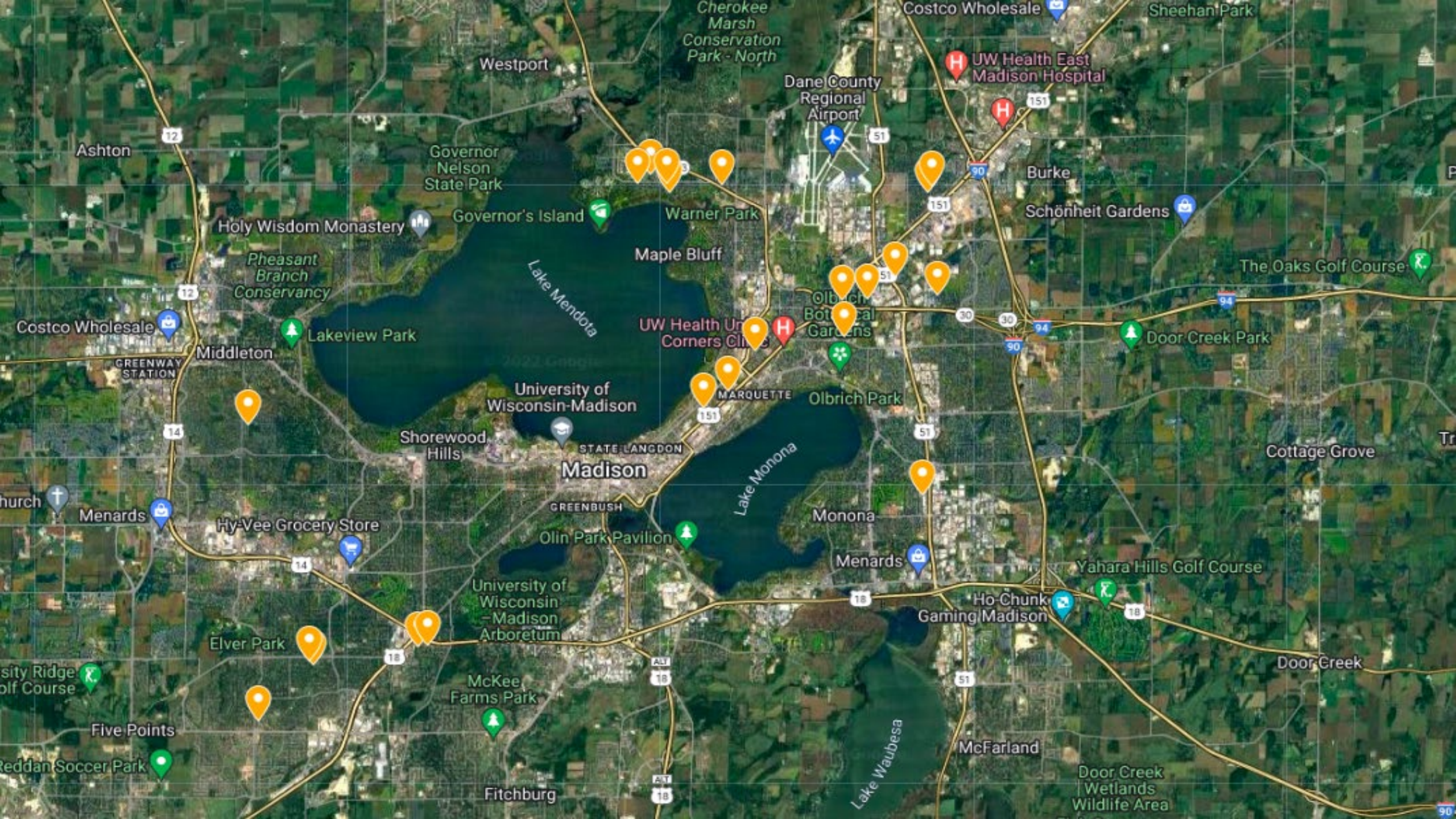


Project Overview



Scattered Site Project

- ❖ Preservation & Permanent Supportive Housing
- ❖ Target population are people who are homeless or have a disability
- ❖ Total number of units is 71 and were acquired by Movin' Out and Housing Initiatives separately
- ❖ Amenities available in neighborhoods include transportation, grocery, medical, services, and more



Community Support Plan

- ❖ Regarding the description of the properties and tenants, both organizations plan on using the Integrated Supported Housing Model.
- ❖ Movin' Out creates a service plan for every project, has a full time Resident Coordinator on staff, and we partner with local firms who provide services.
- ❖ Housing Initiatives has 4 full time staff who provide support networks for clients to allow them to live independently and have access local community, city, and county resources to live successfully.





Collaborators





Service Providers

- ❖ Dane County Continuum of Care
- ❖ Aging and Disability Resources Center
- ❖ Comprehensive Community Services
- ❖ Wisconsin Family Care
- ❖ Dane County Human services
- ❖ Journey Mental Health
- ❖ Tellurian
- ❖ Access to Independence
- ❖ Community Living Connections
- ❖ Options for Community Living
- ❖ Wisconsin Family Care
- ❖ IRIS (Include, Respect, I Self-Direct)



Supportive Services



Support Services

Mental
Health

Employment
Services &
Financial
Literacy

Empowerment
Services

Transportation
Assistance

Food and
Personal
Needs



Market Data & Need



Market Study

Movin' Out has 1,442 on waitlist in Dane County

Dane County Coordinated Entry has 741 Clients on the Priority List

Of the Priority List Clients, 313 are Chronically Homeless

Of the Priority List Clients, 413 have Severe Mental Health Disabilities

242 Clients are both Chronically Homelessness and have Mentally Health Disabilities. This is Housing Initiatives' Target Market.



Project Scope





Development Process

- ❖ Current Status

- ❖ Finalizing MOU between Movin' Out and Housing Initiative

- ❖ Timeline

- ❖ 2018-2022: Movin' Out & Housing Initiatives Partnership initiated
 - ❖ 2022: apply to Madison City Funds, Dane County Funds, WHEDA 4% LIHTC Application
 - ❖ 2023: apply to Chicago AHP, Solar Applications, and additional capital sources
 - ❖ 2023: funding sources awarded and construction starts
 - ❖ 2024: construction completed, tenants move in



Budget

| <u>Sources</u> | | <u>Uses</u> | |
|------------------------|---------------------|-------------------|---------------------|
| First Mortgage | \$3,556,036 | Acquisition | \$4,751,517 |
| Tax Credit Equity | \$2,754,877 | Hard Costs | \$3,281,000 |
| Existing Soft Loans | \$3,318,697 | Soft Costs & Fees | \$3,121,994 |
| City of Madison AHF | \$1,000,000 | Reserves | \$337,608 |
| Dane County AHF | \$500,000 | | |
| Deferred Developer Fee | \$363,509 | | |
| | | | |
| TOTAL | \$11,493,119 | TOTAL | \$11,493,119 |



Underwriting Assumptions

- ❖ 71 total units – mix of Efficiency, 1-, 2-, 3-, and 4-bedrooms
- ❖ Rehab Costs – \$40,000 per unit
- ❖ Many units have existing soft debt that will be noted as an acquisition expense but then also shown as a source with the funder rolling the existing soft funding into the rehab project
- ❖ Acquisition costs also assumes paying off all existing permanent loans
- ❖ Soft costs account for 23 separate sites (survey, environmental, appraisal, etc.)
- ❖ Operating expenses set at \$6K per unit per year + \$1200 per unit per year for supportive services
- ❖ Looked at adding a new construction transitional building with 10 units but this added about \$700K in additional gap



Lessons Learned



Key Takeaways

- ❖ Out of the 71 units, some already have funding sources, so we are limited to soft funds we can additionally apply to
- ❖ There is a need for entry point housing and lack of funding
- ❖ Shortfalls of statewide funding programs meeting the needs of vulnerable populations
- ❖ It's clear organizations like WHEDA want to support vulnerable communities, however within the LIHTC program, many individuals and families are passed over on long waitlists, there needs to be more incentivization within programs such as LIHTC

Questions?

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WHEDA



Thank you!

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WHEDA

