

C/o Waukesha County CDBG Program Lead Agent 515 W. Moreland Blvd. Waukesha, WI 53188 1.262.896.3370 (direct) 1.262.896.8510 (fax)

C/o Wisconsin Partnership for Housing Development, Inc.
Program Administrator
121 South Pinckney Street Suite 420
Madison, WI 53703
1888.318.4486 (toll –free)
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The HOME Consortium
Board of Directors Meeting
Thursday, February 21, 2013
515 W. Moreland Blvd. Rm. 355/359
Waukesha, WI 53188
@ 9:00 A.M.

### **AGENDA**

- 1. Call to Order
- 2. Pledge of Allegiance
- 3. Approval of the Minutes from the December 20, 2012 Board Meeting
- 4. Public/Staff Comment Correspondence
- 5. WI Partnership Fund Balance Report / IDIS Issues
- 6. WPHD Program Summary of 2012
- 7. 2013 Board of Director Officers
- 8. CHI/CCAP Issues
- 9. Hebron House Application
- 10. Habitat for Humanity Jefferson County
- 11. Adjournment

# All agenda items are potentially actionable

In accordance with the Americans with Disabilities Act, persons requiring any means of handicap accessibility for this meeting must contact Kristin Silva at 896-3370 (FAX 896-8510) at least 48 hours prior to meeting.

## Minutes of the HOME Board Meeting December 20, 2012

Members Present:

Joe Birbaum, John Kannard, Dennis Myers, Duane

Paulson, Kathleen Schilling, Jay Schreurs and Peter Sorce,

Staff:

Nancy Mojica

Excused Absence:

Mark Baldwin, Ron Buchanan, Jennifer Hanneman, Mark Hoefert, Russell Kutz, Debbie Narus, Kristin Silva, Glenn Stumpf, Christine Howard Turowski and Maria Watts

- I. The meeting was called to order by the Chair with a quorum of the Board present at 9:08 a.m.
- II. The Chair led the Pledge of Allegiance.
- III. On a motion by Duane Paulson seconded by Joe Birbaum, the minutes from the November 14, 2012 meeting were approved.
- IV. No Public Comments were heard.
  - a. Duane Paulson informed the Board that Christine Howard Turowski was confirmed by the County Board to replace Jill Haupt and represent Waukesha County on the HOME Board.
- V. The Wisconsin Partnership Fund Balance Report was reviewed and accepted.
- VI. On a motion by Dennis Myers and seconded by Peter Sorce, the Board approved the 2013 Slate of Officers with Mark Baldwin being nominated to fill the open Treasurer's position (upon Mark's acceptance of the position) the motion passed.

Chairperson	Joe Birbaum	Waukesha County
Vice Chairperson	Ron Buchanan	Jefferson County
Secretary	Jay Schreurs	Ozaukee County
Treasurer	Mark Baldwin	Washington County

VII. On a motion by Duane Paulson and seconded by Jay Schreurs, the HOME Board approved the HOME Executive Committee recommendations of funding an additional \$155,000 (originally \$280,000 new total of \$435,000) of 2012 HOME CHDO Reserve funds to Movin' Out.

### VIII. 2013 Contracts

- a. On a motion by Joe Birbaum and seconded by Kathleen Schilling, the HOME Board approved the 2013 HOME Administration contract to Wisconsin Partnership for Housing Development, Inc. The motion carried.
- b. On a motion by Joe Birbaum and seconded by Dennis Myers, the HOME Board approved the contracted for the Homebuyer Counseling Agencies (Greenpath, Housing Resources, Inc, Select Milwaukee, Slinger Housing Authority, Jefferson Economic Development Consortium).

- c. On a motion by Kathleen Schilling and seconded by Duane Paulson, the HOME Board approved the 2013 HOME Inspectors contract to Whiteglove Inspections.
- IX. On a motion by Duane Paulson and seconded by Joe Birbaum, the HOME Board approved to table the Habitat for Humanity for Jefferson County. The motion carried.
- X. On a motion by Duane Paulson and seconded by Dennis Myers, the meeting adjourned at 9:25 a.m.

Respectfully submitted,

Peter Sorce Chair, HOME Board

# SUMMARY OF FUND BALANCES FOR HOME CONSORTIUM

Carryover from 2012 DPA, PIR, and Rehab   S   12.276.37   Carryover from 2012 DPA, PIR, and Rehab   S   12.276.37   Carryover from 2012 DPA, PIR, and Rehab   S   12.276.37   Carryover from 2012 DPA, PIR, and Rehab   S   12.276.37   Carryover from 2012 DPA, PIR, and Rehab   S   12.276.37   Carryover from 2012 DPA, PIR, and Rehab   S   12.276.37   Carryover from 2013   S   177.000   Carryover from 2013 DPA, PIR, and Rehab   S   12.276.37   Carryover from 2013   S   177.000   Carryover from 2013	FUNDS AVAILABLE 2013 Year to Date Jan. 31, 2013   Comments	FUNDS AVAILABLE TO COMMIT
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\$ 17,066.39		
TOTAL AVAILABLE 8 1,009,071.49 Strong control of the control of th	\$ 1,009,071.49	02-306-36

<sup>1.</sup> Total funds available during 2013, includes funds camed over from prior years, 2013 allocation and program income received during 2013

<sup>2.</sup> Those are amounts of funds reserved during the month. For downpayment, these means that the banks have reserved for particular home buyers. For the rehab program, it means that an application has been approved and reserved for particular home owners.

<sup>3.</sup> These are amounts of funds reserved since the beginning of the year. For downpayment, these means that the banks have reserved the funds for particular home buyers. For the rehab program, it means that applications have been approved and reserved for particular home owners.

<sup>4.</sup> These are amounts available after deducting funds reserved during the year.
5. These are amounts available to fund new applications for funding such as GHDO and Development Projects.



# PROGRAM ADMINISTRATOR: Wisconsin Partnership for Housing Development, Inc.

2012 DPA	Total # Loans	Total Funds Reserved	
Jefferson County	20	\$	153,546
Ozaukee County	11	\$	84,780
Washington County	27	\$	206,723
Waukesha County	. 22	\$	169,986
TOTAL all Counties DPA Loans	80	\$	615,035.00

2012 Purchase/Rehab	Total # Loans	Total Funds Reserved	
Jefferson County	10	\$	143,839
Ozaukee County	-	\$	-
Washington County	2	\$	32,920
Waukesha County	3	\$	30,583
TOTAL all Counties Purch/Rehab Loans	15	\$	207,342.03

2012 Rehab Program	# Loans Closed	Total
Jefferson County	. 2	\$ 30,000.00
Ozaukee County	3	\$ 43,564.00
Washington County	1	\$ 20,000.00
Waukesha County	5	\$ 57,163.85
Total all Counties Rehab	11	\$ 150,727.85

2012 All Loan Programs	# Loans Closed	Total	%
Jefferson County	32	\$ 327,384.20	34%
Ozaukee County	14	\$ 128,344.00	13%
Washington County	30	\$ 259,643.20	27%
Waukesha County	30	\$ 257,733.48	26%
Total all Counties Rehab	106	\$ 973,104.88	100%



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c/o Community Housing Initiative, Inc.
Program Administrator
259 W. Broadway, Suite 100
Waukesha, WI 53186
1.800.371.2227 (toll free)
1.262.650.2700 (direct)
1.262.650.2706 (fax)

# 2013 SLATE OF OFFICERS

Position	Name	County
Chairperson:	Joe Birbaum	Waukesha County
Vice Chairperson:	Ron Buchanan	Jefferson County
Secretary:	Jay Schreurs	Ozaukee County
Treasurer:	Mark Baldwin	Washington County



### HOME CONSORTIUM APPLICATION

### **APPLICANT**

Applicant's Legal Name: Hebron House of Hospitality, Inc.

Address: 111 East Main Street, Waukesha, WI 53186

Is the organization a CHDO? ✓ Yes

Contact Name: Ms. Bernardine Juno Title: Executive Director

Telephone: 262-522-1400 FAX: 262-549-8730

E-Mail: bjuno@hebronhouse.org

Federal Identification Number: 39-1414365 Date Incorporated: July 1982

PROJECT SCOPE

Project Title: 620 Summit Apartments

Project Address: 620 Summit Avenue, Waukesha, WI 53186

County: Waukesha

Funds Requested: \$133,000

Number of HOME units: 0\*

Amount of HOME per unit: n/a

\*100% of the proposed 8-units will be affordable to persons with incomes below 30% of the HUD-defined County Median Income (CMI) through a Project Rental Assistance Contract (PRAC) issued and funded by HUD through the Section 811 "Supportive Housing for Persons with Disabilities Program"

Project Type (Check One): ✓ New Construction (Rental)

Population to be served (Check all applicable): ☑Special Needs

Describe the general scope of the project:

The Project Scope includes the development of eight (8) units of supportive housing for persons with disabilities using a \$1,298,200 Capital Advance awarded to Hebron House of Hospitality, Inc. (the Sponsor of the development) through the HUD Section 811 program. All of the units will be affordable for very-low income persons with disabilities through a through a PRAC issued and funded by HUD. The development will provide permanent housing with supportive services coordinated by Hebron House.

How does the project fit into the priorities set forth in the 2010-2014 Consolidated Plan?

- Benefitting low- and moderate-income households, serving those households with the lowest income (30% of Waukesha County median Income)
- · Addressing a lack of affordable permanent rental housing
- Housing that is physically accessible for persons with disabilities
- Providing permanent housing linked specifically with supportive services, including sustained funding for supportive services

Hebron House of Hospitality, Inc. is a CHDO for the HOME Consortium four county area and a state CHDO. The agency's is located in Waukesha County (in the city of Waukesha) and 82% of the clients served by Hebron House are from Waukesha County.

### SITING AND DESIGN

Please submit design information with the application, such as a scaled site plan, and building elevation and floor plan drawings to document the design characteristics of the proposed development.

Please see attached site plan, floor plans, and colored building elevation.

Do you have site control? ✓ Yes

Does the project have local zoning approval? ✓Yes

When will the project get underway? Anticipated 6/1/2013

When will it be completed? Approximately 9-months from start of construction; 3/31/2014

Describe the site in terms of its accessibility to social, recreational, educational, commercial, health facilities and services, and other municipal facilities and services, or any other advantageous aspects of the site:

The proposed Site is located in a residential neighborhood along an accessible public transportation line that allows the residents to easily access community amenities independently. Community amenities that are located within 1-mile of the proposed development site include:

- Downtown Waukesha Commerce
- Health (Waukesha Mental Health Center, Moreland Medical Center)
- Food (George Webb, Subway)
- Recreation (Central Business District, Horeb Spring Park)
- Civic Facilities (Waukesha County Offices)

Describe any adverse conditions this site may face, including any environmental issues, proximity to existing or proposed freeways, flooding issues, or proximity to odors or pollution from industrial issues:

Removal of an existing underground storage tank (UST) will be coordinated by the general contractor according to the standards of the Wisconsin Department of Natural Resources.

### Describe some of the design features of the project:

The development includes a total of eight (8) units in two separate single-story buildings, and will include common programming areas in each building that will facilitate supportive services and resident activity programming. The building will be fully accessible for persons with disabilities and will incorporate basic visit-ability standards to accommodate the disabled residents of the proposed development.

The development has been re-designed four (4) times to respond to comments by the adjacent neighbors, the City of Waukesha Plan Commission, and to address changes in the property line setback requirements communicated by Waukesha City Staff.

Features for the proposed development include (but are not limited to):

- The building is designed to blend well with the characteristics of the existing neighborhood
- Each unit and common areas are designed with an "at grade" entrance for accessible entry
- Each unit includes physical building elements that support persons with physical disabilities, including accessible kitchens, bedrooms, and restrooms
- Construction of the proposed development will incorporate the National Association of Home Builders (NAHB) Model Green Home Building Standard
- · Attractive landscaping designed by a licensed landscape architect

### PROJECT TARGETING/AFFORDABILITY

Targeting	Number of Households (units)
Elderly	
Supportive Housing	8
Family	
Proposed HOME	
None of These	
Total	8

Income Targeting	Number of Households (units)	Number of Members in Household	Maximum Household Income
<30% of AMI	8	1	\$14,750*
30-50% of AMI			
50-80% of AMI			
>80% of AMI			
Total	8		

<sup>\*</sup>per FY 2013 HUD Income Limits Documentation System for Waukesha County – 1 person household at "Extremely Low (30%) Income Limits"

### Describe the affordability period for the proposed affordable units:

The development must remain affordable for a period of 40-years per the requirements of the HUD Section 811 program.

### **LEVERAGE**

Describe the percentage of requested HOME Consortium funds to the project's total funding:

The total development budget is \$1,437,755 with a HOME request of \$133,000 - or 9.25% of the project budget.

How will the requested funds be returned to the HOME Consortium as program income?

✓ No return of funds

✓ Other, please describe:

The request for funds is to fill a project budget shortfall, and includes the understanding that HUD Capital Advance funds will be used to repay \$297,000 to Waukesha County, advanced for the purchase price of the land.

The gap financing includes uses of funds that are permitted under the applicable HUD regulations 24 CFR 92.205 and 92.206.

### STRENGTH OF APPLICANT

Please provide a Capital Budget clearly identifying all sources of funding. You may use the following budget format or supply your own. For rental projects, please provide an operating Proforma.

See attached Development Budget that includes Sources & Uses of Funds for construction, and a Stabilized Operating Proforma, which includes revenues and expenses from operations.

### Additional notes:

The HUD Capital Advance is a form of "grant", and does not need to be repaid.
 Customary financing costs (such as the interest rate, debt payments, and financing fees) do not apply to this project. The Capital Advance is both construction and permanent financing for the development.

Please describe below and provide written documentation of commitments from other funding sources and any other partnerships for this project.

See the attached HUD Capital Advance Commitment.

### EXPERIENCE/CAPACITY

Please provide your most recent audited financial statements.

Attached are the Hebron House of Hospitality, Inc. 2011 Audited Financial Statements.

Please describe the organization's housing development experience:

Hebron House is partnering with Tarantino & Company LLC, who acted as housing consultant for the HUD Section 811 application for the Capital Advance, and is responsible for facilitating

the development, public approvals, financial analysis, and construction-related matters. Tarantino & Company was organized and began operation in 1992, and has developed (and operates) more than 3,000 units of housing for seniors and persons with disabilities.

Hebron House is both a Community Housing Development Organization (CHDO) for the State of Wisconsin, and the HOME Consortium in Waukesha County, Washington County, Jefferson County and Ozaukee County. Hebron House is currently the only CHDO exclusively active in Waukesha County.

Hebron House owns two 4-unit apartment buildings through the State Balance of Continuum of Care HUD Supportive Housing Program for persons who have co-occurring disorders (Gander Housing), and includes housing for both single individuals and families. Hebron House of Hospitality also owns a four-unit apartment building for very-low income households purchased through a HOME grant (Hillside Housing). Hebron House actively manages these housing developments and facilitates case management and supportive services to residents in need.

In addition, Hebron House holds a member interest in housing developments that provide over 500 units of housing (and services) to serve frail seniors, and has the responsibility for ensuring that the units supported by CHDO dollars (administered through the Wisconsin HOME Rental Housing Development program) are rented to low and very-low income residents. The residents occupying these units are provided with the same access to community amenities as the market-rate apartments in the developments.

For the past 5 years Hebron House has raised funds from the Waukesha Community to operate a night-time Overflow Shelter for the winter season which is presently located at the former Northview School.

Hebron House is leading a collaboration of area nonprofits to operate a Daytime Drop-In site for the winter months at the Hope Center of Waukesha County site. Individuals at the Daytime Drop-In site meet with the Hebron House of Hospitality Outreach coordinator, apply for Social Security Benefits and Badger Care, pursue housing opportunities, complete on-line employment applications, receive transportation assistance through bus tickets, set up medical and mental health appointments and receive breakfast, lunch and dinner. Workforce Development also provides classes on writing resumes and going on job interviews.

### Please list relevant staff experience/qualifications and provide resumes:

Hebron House has entered into a development and construction contract with Tarantino & Company, LLC and Trisect, Inc. who have significant experience in real estate development and construction. See the attached resume of the Tarantino Family of Companies.

The Executive Director of Hebron House of Hospitality, Bernardine Juno, is one of the founders of the agency and has 30-years of experience working with the issues of housing and homelessness. See attached resume for Bernardine Juno and Jennifer Henry.

The Director of Programs for Hebron House of Hospitality, Jennifer Henry, has extensive experience in the supervision of and provision of services for people with homelessness, mental health and AODA issues. See attached resume for Jennifer Henry.

Other Hebron House organizational experience includes: Developed programming, policies and procedures, as well as proposals to fund programming; Extensive community involvement, quality assurance, and HR development.

### Please describe any partnerships for this project:

Partner agencies include:

- Tarantino & Company LLC, a Waukesha development company, who is providing real estate development consulting services.
- Department of Health and Human Services will assist with residents who qualify through the Aging and Disability Resource Center of Waukesha County with links to services coordinated with the Hebron House Case Manager.
- ProHealth Care, through the Community Clinic and the Outreach Nurse Program, provides services for residents in the community as needed.
- Association for the Rights of Citizens with Handicaps will provide referrals and service assistance as needed.
- Adaptive Community Approach Program will provide referrals and access to support services.
- The Women's Center will provide referrals and support services to any resident who experienced any form of domestic violence.
- Waukesha County Housing Action Coalition will provide referrals from member agencies and support services through referrals.
- Addiction Resource Council will provide ongoing support services to residents with alcohol and other drug abuse issues.
- Richard's Place will provide referrals and support services to any resident with AIDS.
- Waukesha Housing Authority will provide assistance with vouchers to any resident who qualifies when or if they choose to move.
- National Alliance on Mental Illness will provide referrals and ongoing support services to persons with mental health issues or veterans with mental health issues.
- The Mental Health Association will provide referrals and information for residents seeking other support services.

# Will the project create any challenges for the organization? If so, how will these be overcome?

1. Construction of the proposed building and site improvements.

Hebron House does not internally have the capacity to demolish the existing site improvements, address the environmental issue related to the Underground Storage Tank, and construct the proposed development.

To address this challenge, Hebron House has entered into a development and construction contract with Tarantino & Company, LLC and Trisect, Inc. who have significant experience in real estate development and construction.

### RESIDENTIAL RENTAL AND OWNERSHIP PROJECTS

Briefly describe the following:

Activities to bring the project to housing and code standards:

Not applicable - new construction

Improvements (and numbers of units) to make the housing accessible:

Not applicable – new construction. The housing will be accessible for persons with physical disabilities.

### Ways to assure the long term affordability of the project:

HUD provided the financing for the project through Section 811, which includes a Capital Advance to construct the building, and a Project Rent Assistance Contract (PRAC) which provides ongoing financial support through rental assistance and support services funding for the low-income residents. Residents will only be required to pay 30% of their income toward their rent and expenses.

### **RESIDENTIAL RENTAL PROJECTS**

### Provide the following information about specific units in a rental project:

100% of the total eight (8) units will be affordable for disabled persons with incomes below 30% of the HUD-defined CMI.

- The monthly rental rate for each resident is equal to 30% of their monthly income. (For example, a qualified resident would have a maximum monthly income of approximately \$1,230. The resident's portion of the rent would be \$369, and the remaining operating cost is provided to the owner of the development through the PRAC.)
- Utilities are included in the resident's portion of the rent, unless a utility allowance is provided.

### Describe briefly your tenant selection criteria and process.

Residents of the prospective development will be selected in accordance with guidelines outlined in the Section 811 Supportive Housing for Persons with Disabilities Program. The Hebron House of Hospitality, Inc. (Hebron House) is proposing to target the development to adults who have a primary diagnosis of severe and persistent mental disability (CMI) and/or dual diagnosis of addiction and mental disability.

The U.S. Department of Housing and Urban Development (HUD) eligibility definitions will be the criteria for occupancy and participation. "Disability" is further defined by HUD as follows:

- The disability is indefinite in duration
- · The disability substantially limits the person's ability to live independently, and
- The person will benefit by more suitable housing than is currently available.

Individuals impacted with CMI face enormous challenges getting the housing and care they need to ameliorate the effects of their disability. Following the movement of patients from state mental hospitals to community settings, the problems faced by people with chronic mental illness became more visible and more apparent to the communities in which they live.

# Include how and from whom/where persons will be referred and admitted for occupancy in the project.

Anticipated primary sources of prospective residents are people identified by partner agencies in the market area. Please note however, that no applicant will be denied services based upon a disability not specifically identified or listed.

### Partner agencies include:

- Department of Health and Human Services
- · Aging and Disability Resource Center of Waukesha County
- ProHealth Care
- Association for the Rights of Citizens with Handicaps
- Adaptive Community Approach Program

- The Women's Center
- Waukesha County Housing Action Coalition
- Addiction Resource Council
- Richard's Place
- Waukesha Housing Authority
- National Alliance on Mental Illness
- The Mental Health Association

In addition, some of the residents are anticipated to have experienced, or may be experiencing, homelessness, and come from one of the providers in the emergency shelter system in Waukesha County.

Does the project include plans to provide supportive services to residents or links to appropriate services? If yes, please describe.

All of the services provided at the development will be coordinated through the Case Management services of Hebron House of Hospitality and the partner agencies.

Residents of this development are anticipated to need services and assistance in the following general areas:

- Life skills training and assistance with daily living skills
- Money management
- · Obtaining and maintaining benefits
- Assistance in maintaining or developing social relationships with family, friends, and other informal support in the community
- Crisis intervention services
- Assistance with daily living skills that include symptom management, and skills to become independent consumers of mental health services
- Medication monitoring
- Assistance in procuring other independent community living situations as the resident gains community living skills
- Assistance in choosing and accessing community services such as medical and dental care, legal assistance, and mental health services
- Assistance in acquiring clothing and furnishings

### ADDITIONAL QUESTIONS FOR ALL PROJECTS

What percent of the housing units in your project are family (not elderly) rental units affordable to families making less than 50% of the area median income?

0% are targeted to families. The target population is persons with disabilities.

Are any of the units in your project public housing replacement units through an agreement with the local Housing Authority?

No. However, the Waukesha Housing Authority may provide referrals to the development.

Is your project a mixed use development (example: housing and commercial)?

The project is not a mixed-use development.

Will your project incorporate the Star Home Program requirements or another documented energy savings program that provides guaranteed EPA Energy Star Certification of the finished housing units?

Yes. The project will receive a Bronze Green Building Certification through the NAHB Green Building program.

What percent of the proposed units are designed to be fully handicap accessible as defined in Federal and State guidelines?

All the units are designed to be accessible for persons with disabilities.

Every dollar of HOME funds used must be matched with at least 25 cents from nonfederal sources, which may include donated materials or labor, the value of donated property, proceeds from bond financing, and other resources. Please describe how your project will meet the minimum 25% federal match requirement:

According to 24 CFR 92.220, the direct cost of supportive services provided to families residing in HOME-assisted units during the period of affordability (including case-management, mental health services, substance abuse treatment and counseling, and job training and counseling) may be included as a HOME-eligible match.

The total HOME request is for  $$133,000 \times 25\% = $33,250$ . Over the time of the 40 years of the project's operation, with a minimum of eight (8) hours per week of Case Management services, the value of in-kind professional services would exceed \$249,600.

### **CHDO OPERATING**

Hebron House is not requesting CHDO operating support in this application for funds.

Separate Signature Page Attached

# <u>**AUTHORIZATION**</u>

On behalf of <u>Hebron House of Hospitality, Inc</u> (Applicant), I substitute application for funding to the HOME Consortium. To the best of my knowledge all information contained herein is accurate and complete as stated.	
Bernardine Uso SIgnature	Efec. Director
Bernardine Juno	<u>01/29/2012</u> Date