

HOUSING TRUST FUND ADVISORY BOARD

2008 Annual Report

The attached report is submitted pursuant to s. 316-1 of the Milwaukee Code of Ordinance.



**HOUSING
TRUST FUND
CITY OF MILWAUKEE**

HOUSING TRUST FUND ADVISORY BOARD

2008 ANNUAL REPORT

Purpose: (Per s. 316-1 of the Milwaukee Code of Ordinances)

The Housing Trust Fund is created to support developers and governmental entities in the acquisition, construction, rehabilitation and modification of affordable and accessible housing for low-income households, and to finance support services that assist low-income households in obtaining and maintaining affordable housing.

Members (for 2008)

The Housing Trust Fund Advisory Board consists of the following members, who serve staggered, two-year terms:

CHAIR

Ald. Michael Murphy

MEMBERS

Ald. Robert Bauman
(Appointed by the Common Council President)

Ms. Cecelia Gore
(Appointed by the Mayor)

Mr. Ray Schmidt
(Appointed by the Mayor)

Mr. Craig Kammholz
(The City Comptroller or his/her designee)

Mr. James Hiller
(A non-profit developer (appointed by the Common Council President))

VACANT
(A for-profit developer (appointed by the Common Council President))

Mr. Michael Soika
(A representative of Continuum of Care)

Mr. Vincent Lyles
(A representative of a financial institution (appointed by the Common Council
President)

Ms. Cathie Madden
(A representative of the Local Initiatives Support Corporation)

Ms. Bethany Sanchez
(A representative of the Metropolitan Milwaukee Fair Housing Council)

Mr. Brian Peters
(A representative of Independence First)

Ms. Heather Dummer Combs
(A representative of the Interfaith Conference of Greater Milwaukee)

Staff

Ms. Terry J. MacDonald, Staff Assistant
Ms. Joanna Polanco, Council File Specialist
Mr. Steve Mahan, Director, Community Development Grants Administration
Mr. Garry Werra, Community Development Grants Administration
Mr. Tom Gartner, Assistant City Attorney

Committee meetings held in 2008:

January 18, 2008
April 11, 2008
May 9, 2008
June 12, 2008
July 10, 2008
August 14, 2008
September 11, 2008
November 13, 2008

In 2007 the Housing Trust Fund Advisory Board created two subcommittees; the Housing Trust Fund Advisory Board Technical Review Subcommittee (created May 2, 2007) and the Housing Trust Fund Advisory Board Finance Subcommittee (created June 12, 2007).

Housing Trust Fund Advisory Board Technical Review Subcommittee

Purpose:

This subcommittee was created as a permanent subcommittee and its first task was to create a scoring measure for the scoring of the applications and its main task thereafter was to review the housing trust fund applications and to make funding recommendations to the full Housing Trust Fund Advisory Board.

MEMBERS

Mr. Craig Kammholz, Chair

Ms. Bethany Sanchez, Vice Chair

Ms. Cecelia Gore

Ms. Cathie Madden

Subcommittee meetings held in 2008:

January 14, 2008

June 2, 2008

July 9, 2008

Housing Trust Fund Advisory Board Finance Subcommittee

Purpose:

This subcommittee was created to investigate ways to raise money for the housing trust fund.

MEMBERS

Mr. Vincent Lyles, Chair

Ms. Cathie Madden, Vice Chair

Mr. Brian Peters

Mr. Ray Schmidt

Ms. Bethany Sanchez

Subcommittee meetings held in 2008:

June 12, 2008

ACCOMPLISHMENTS IN 2008

The Housing Trust Fund Advisory Board and its Technical Review and Finance Subcommittees worked together to accomplish the following in 2008:

- The Housing Trust Fund Advisory Board met on January 18, 2008, and approved the following housing trust fund award recommendations submitted by the Technical Review Subcommittee:

HOMELESSNESS:

Mercy Housing Lakefront - \$750,000

RENTAL:

St. Catherine's Residence, Inc. - \$264,000

Heartland Housing - \$125,000

United Methodist Children's Services of Wisconsin, Inc. - \$200,000

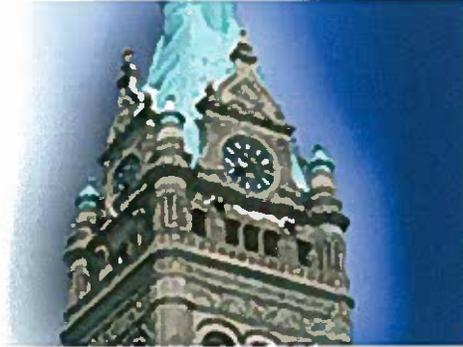
HOMEOWNERSHIP:

Milwaukee Christian Center (CHIDO Project) - \$68,000

- At the June and July meetings of the Technical Review Subcommittee and the Housing Trust Fund Advisory Board, members reviewed and revised the housing trust fund application form and scoring measure. (**APPENDIX A**)
- On June 10, 2008, Ald. Murphy submitted for introduction to the Common Council a resolution authorizing the acceptance and expenditure of up to \$250,000 in private contributions by the Department of Administration, Community Development Grants Administration Division for the Housing Trust Fund (File #080216); and, on July 1, 2008, the Common Council adopted Resolution File Number 080216, unanimously. (**APPENDIX B**)
- At the June 12, 2008, Finance Subcommittee meeting, it discussed the possibility of creating a trust or an endowment for the housing trust fund. The Assistant City Attorney present at that meeting suggested that one way a trust or endowment could be administered is by having a 501(c)(3) corporation created that would include city participation, but is considered a separate entity, similar to the Milwaukee Economic Development Corp. or the Neighborhood Improvement Development Corp. A 501(c)(3) corporation could go out and raise funds for a trust or endowment.

- At the June 12, 2008, Finance Subcommittee meeting, Mr. Leo Ries, Executive Director, Local Initiatives Support Corporation and Mr. Robert Henken, President, Public Policy Forum appeared and gave an overview of a proposal for an affordable housing study that they were contemplating doing. Mr. Lyles, Chair of the Finance Subcommittee then advised the Housing Trust fund Advisory Board at its June 12, 2008 meeting, of the study and how it could possible provide information on raising funds for the housing trust fund.
- On August 14, 2008, the Housing Trust Fund Advisory Board approved a request for a \$10,000 grant from the Housing Trust Fund to fund a study proposed by the Local Initiatives Support Corporation and the Public Policy Forum titled “A Sustainable Approach to Creating and Administering Low-Income and Special Needs Housing in Milwaukee County.” On September 16, 2008 the Common Council adopted File No. 080645, which authorized the appropriation of the \$10,000 from the Housing Trust Fund account to the Local Initiatives Support Corporation and the Public Policy Forum. **(APPENDIX C)**
- In September of 2008, the second request for proposals (application) process began and the due date for those applications was set for October 27, 2008. (In October of 2008, a one week extension on the due date was given, the new deadline was set for November 3, 2008)
 1. The second round of request for proposals brought in 28 applications. **(APPENDIX D)**
 2. In November and December of 2008, City staff worked on reviewing and computing the objective scores (when required), for each of the applications. When City staff completes it review, each of the Technical Review Subcommittee will be given a set of applications with a list of recommendations prepared by City Staff for their review and computing of the subjective scores. When the Technical Review Subcommittee convenes its next meeting, it will review and combine all the scores for the second round of applications, craft recommendations and forward those recommendations to the full Housing Trust Fund Advisory Board for its approval.

APPENDIX A



CITY OF MILWAUKEE HOUSING TRUST FUND

**APPLICATION FOR FUNDING
2008**



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

BACKGROUND:

The City of Milwaukee Housing Trust Fund was created by the Common Council on September 9, 2006 for the purpose of improving housing conditions for low-income persons in the City and to provide support for non-profit and for-profit developers and governmental entities in the acquisition, construction, rehabilitation and accessibility modification of affordable housing for low-income households in Milwaukee. The Housing Trust Fund was also created to fund services that assist low-income households in obtaining and maintaining affordable housing.

A diverse 13-member advisory board, serving staggered, 2-year terms, provides oversight of the Housing Trust Fund, as well as final funding recommendations to the City of Milwaukee Common Council. The Community Development Grants Administration (CDGA) Division of the City's Department of Administration administers the Housing Trust Fund.

The Housing Trust Fund Board is responsible for evaluating requests for funding from the Housing Trust Fund after those requests have been submitted to and reviewed by CDGA. In making funding-allocation decisions, the Board will also consider a report on Milwaukee's housing needs that is prepared annually by the Department of City Development.

FUNDING GUIDELINES

- A minimum of 25% of Housing Trust Fund dollars must be used to develop housing and provide services for people who are homeless.
- A minimum of 35% must be used to develop or rehabilitate rental housing.
- A minimum of 25% must be used to create and maintain home ownership opportunities.
- The remainder of the Fund (15% or less) is available for "flexible" use to respond to any other housing needs identified by the advisory board, subject to the requirements of the Housing Trust Fund.
- In any of these categories, Housing Trust Fund dollars may be used to fund accessibility or visitability improvements or modifications. However, at least 2% of available Housing Trust Fund dollars or \$100,000, whichever is less, must be used to fund accessibility improvements or modifications in any of the 3 funding categories (homeless, rental and home ownership) annually.

***HOUSING TRUST FUND ACTIVITIES MUST OCCUR IN
THE CITY OF MILWAUKEE***

***REQUESTS FOR PROJECTS OR ACTIVITIES OUTSIDE OF THE CITY OF
MILWAUKEE WILL BE REJECTED***



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

Trust Fund dollars must always be used to leverage and complement other sources of financing and to close funding gaps. **Housing Trust Funds may not be used as the primary source of funds for any project.**

ELIGIBLE APPLICANTS

1. A nonprofit organization organized under Chapter 181 of the Wisconsin Statutes, qualified as a Section 501(c)(3) organization, at the time of grant application submission.
2. A for-profit organization organized and licensed to do business in the State of Wisconsin at the time of grant application submission.

Individuals may not apply for direct assistance from the Housing Trust Fund.

AFFORDABILITY REQUIREMENTS

1. **Rental Housing:** Rental Housing funded with Housing Trust Fund dollars shall remain affordable for a minimum of 30 years, with a review of the affordability requirement at 15 years. The advisory board shall have discretion to remove a particular housing development from the Housing Trust Fund program at the time of the 15-year review.
2. **Owner-Occupied Housing and Homeownership:** Housing Trust Fund dollars used for the acquisition, new construction or rehabilitation of an owner-occupied dwelling, will be forgiven if the owner lives in the home for at least 5 years. The requirement to live in the home for at least 5 years will be enforced through a deed restriction or other comparable security instrument approved by the Board. If the owner sells the home before the end of the 5-year period, the owner will be required to reimburse the Housing Trust Fund the entire loan amount unless the property is sold to another income-eligible household.

Housing Trust Fund dollars are available for home-buying counseling. Homebuyer counseling agencies must demonstrate that they serve low- and moderate-income clients. In addition, any organization that receives Housing Trust Fund money for this purpose must demonstrate that it has the ability to assist disabled individuals (e.g., the location is accessible and the organization offers translation services, materials in Braille, etc.).

3. **Housing and Services for the Homeless:** All Housing developed for the Homeless must remain as homeless housing for a minimum of 50 years.

NOTES:

- Projects not meeting the minimum affordability requirements are ineligible.
- Additional points will be assigned, on a sliding scale, for projects that exceed the minimum period of affordability.



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

INCOME ELIGIBILITY

1. **Owner-Occupied Housing:** Financial assistance from the Housing Trust Fund for the acquisition, new construction or rehabilitation of owner-occupied housing is limited to households with incomes at or below 100% of the County Median Income, where “income” is calculated using the Census Bureau Long Form method.

The maximum income for homeowners seeking financial assistance for rehabilitation projects is limited to 65% of County Median Income for substantial work (e.g., work valued at more than \$5,000) and 100% of County Median Income for more modest projects (e.g., work valued at \$5,000 or less). Income limits are based on the CMI and are subject to change annually.

2. **Rental Housing and Housing for the Homeless:** Financial assistance from the Housing Trust Fund for rental housing and projects for the homeless (acquisition, new construction or rehabilitation) is limited to projects that serve households/individuals at or below 50% of the County Median Income.

Please refer to Attachment A for current Housing Trust Fund income limits

APPLICATION SCORING

The advisory board will give weighted consideration to applications that will:

- Leverage other funds (private and/or public).
- Serve the lowest-income segment of the population.
- Exceed the term of affordability beyond the minimum required by the Housing Trust Fund.
- Use workers from the neighborhood and/or give priority to emerging business enterprise contractors.
- Encourage more neighborhood diversity and increase housing choices within the neighborhood.
- Use green building principles.
- Coordinate with and enhance the work of other entities in the neighborhood, such as employers, business improvement districts, schools, job training agencies or social service agencies.
- Facilitate the movement of persons from institutions into the community.
- Use contractors who pay family-supporting wages.

Please refer to Attachment C for a detailed description of application scoring measures.



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

ACCESIBILITY REQUIREMENTS

1. **Multi Family PROJECTS (Three or more units)**

All new construction or substantial rehabilitation projects receiving Housing Trust Funding must comply with the following standards:

- Section 504 of the Rehabilitation Act of 1973.
- Fair Housing Act as amended.
- Americans with Disabilities Act (with respect to marketing-office and common areas).
- Wisconsin Open Housing Act.
- Architectural Barriers Act.

Additionally, these projects must meet at least one of the following design principles:

1. Aging in place
2. Universal design
3. Any other accessible and/or adaptable design criteria approved by the Housing Trust Fund Advisory Board.

2. **HOMEOWNERSHIP PROJECTS (New housing units in one- to three-unit structures)**

Each ground-floor unit shall be constructed to the following "visitability" standards):

1. One zero-step entrance to the dwelling unit that will permit a visitor using a wheelchair to enter the main-level floor of the dwelling unit through a doorway entrance that has a minimum 32" clear passage opening.
2. Usable path of travel throughout the interior main-level floor of the dwelling unit that is no narrower than 36" at any point except for interior doorway openings with a minimum 32" clear passage opening.
3. Powder room (half bath) on the main-level floor that has:
 - i. A doorway entrance with a minimum 32" clear passage opening;
 - ii. Sufficient space to close the entrance door while the room is occupied;
 - iii. A minimum 30" by 48" floor space clearance; 4) reinforced walls for future installation of grab bars to provide access to the toilet if necessary.

Any of these standards (except standards imposed by federal or state law) may be waived or reduced by the Housing Trust Fund's advisory board, upon consultation with appropriate City staff, if project site conditions are unsuitable, but any such waiver does not exempt the project from all other applicable requirements regarding accessibility and visitability.



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

INSTRUCTIONS FOR COMPLETING THE APPLICATION

Submission of an application does not guarantee funding. For all projects financed by the Housing Trust Fund, Trust Fund dollars must be used to leverage and complement other sources of financing and to close funding gaps. *Housing Trust fund dollars may not be used as the sole source of funding.*

COMPLETED APPLICATIONS AND REQUIRED ATTACHMENTS MUST BE PHYSICALLY RECEIVED AND TIME-STAMPED AT THE COMMUNITY DEVELOPMENT GRANTS ADMINISTRATION OFFICE **NO LATER THAN 4:00 P.M. ON MONDAY, OCTOBER 27, 2008.** NO EXTENSIONS WILL BE GRANTED. SUBMIT THE ORIGINAL AND **FIFTEEN (15) COPIES** TO:

Mr. Steven L. Mahan, Director
Community Development Grants Administration
200 East Wells Street, Room 606
Milwaukee, Wisconsin 53202

Questions may be directed to the office of Community Development Grants Administration at (414) 286-3647. Your application will begin when your complete application has been received, including all items indicated below:

1. A fully completed application. If a question does not apply, indicate this on the application.
2. Applicants should include audited financial statements for three years, if in existence for less than three years, all statements received to date (balance sheets, cash flow statements, and profit and loss statements). For special limited purpose corporations, the supporting organization's statements.
3. Tax returns for three years (Individual 1040, Corporate 1120, Form 990, and Partnership 1065).
4. Project or Business plan
5. Site photos showing front and rear of building (if applicable). If vacant land, pictures from the north, south, east and west.
6. Market analysis for projects containing twelve or more residential units.
7. Resumes and qualifications of the development team.
8. Project cost analysis including acquisition, construction, rehabilitation, renovation and other applicable costs,
9. Sources of funding. Provide copies of any financial commitments obtained for acquisition, construction and permanent loans.
10. A minimum 5-year projected pro-forma (Not required for Homeownership Category)
11. An affordability analysis indicating the income level household that can afford the proposed housing at current interest rates or rent levels.
12. Post rehabilitation or new construction appraisal

The City of Milwaukee reserves the right to request additional information as deemed necessary by the Housing Trust Fund Advisory Board



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

NOTICES

The City of Milwaukee reserves the right to reject any or all proposals. Contract awards based on submitted proposals shall further be subject to actual availability of sufficient Housing Trust Funds. Should the availability of Housing Trust Funds be reduced, the City of Milwaukee Common Council can modify and reduce the award. In the event of such a modification or reduction, the recipient shall be notified in advance of the pending Common Council meeting where such action shall take place.

All materials submitted shall become public records retained by the City of Milwaukee, with the following exceptions: late and/or incomplete applications or requests for funding for projects that are not a part of this solicitation, will be returned to the applicant without further review, and materials not requested as part of the application packet will be discarded.

If Applicant makes a false statement or misrepresentation in this Application to obtain Housing Trust Funds and funds are awarded, the funds and contract will be in default and the City may declare all of any part of the funds paid out immediately due and repayable to the City and the contract voided.

FUNDING DECISION

The actual decision to award funds is considered first by the City of Milwaukee Housing Trust Fund Advisory Board and forwarded to the Common Council for final review and approval. Funding recommendations by CDGA staff are advisory to the Housing Trust Fund Board. Applicants that are not recommended for funding will be notified by mail within 30 days of Common Council action.

In addition, the Housing Trust Fund Board may designate an agency to act as a subrecipient in any manner it deems appropriate to carry out an eligible activity, per the Housing Trust Fund regulations.

ALL AWARDS ARE SUBJECT TO NEGOTIATION OF FINAL TERMS.



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

Organization Name: _____		
Organization Address: _____	City _____	Zip _____
Contact Person: _____	Title _____	
Telephone Number: _____	Fax: _____	
E-Mail: _____	FEIN _____	

Indicate the amount requested in the appropriate category below. ***Please submit a separate application for each category being requested.***

Activity	2008 Funds Available	Amount Requested
Homelessness	\$373,250	
- Rehabilitation of Existing Facility		\$
- New Construction of Facility		\$
- Provide Supportive Services		
Rental Housing	\$522,550	
- Rehabilitation of Existing Structure		\$
- New Construction		\$
Home Ownership	\$373,250	
- Rehabilitation of Existing Structure(s)		\$
- New Construction		\$
- Owner-Occupied Rehabilitation		\$
- Homebuyer Counseling Services	<div style="border: 1px solid black; padding: 2px;"> The use of HTF dollars is currently limited to capital improvement (brick and mortar) activities </div>	
- Post-Purchase Counseling Services		
Other Needs as Identified	\$213,950	\$
TOTAL	\$1,483,000	\$
Indicate the percentage and amount of HTF funds requested that will be used to fund accessibility improvements or modifications. → _____ % \$ _____		

Proposals must be authorized and signed by the Chief Executive Officer -AND- an official of the Board of Directors.

Signature: _____	Date: _____
Printed Name: _____	Title: _____
Signature: _____	Date: _____
Printed Name: _____	Title: _____



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

PART I: PROJECT DESCRIPTION

1. **Describe the Project:** Briefly identify the project location and the specific activity to be completed.

- a. **If project involves construction or rehabilitation, please attach photos of the site and sketches or drawings of the proposed project.**

_____ Photos and/or sketches are attached

_____ Project does not involve construction or rehabilitation

- b. **If the project involves the provision of services, briefly describe the specific services to be provided. Also, describe the partners and specific funding source(s) for the services to be provided.**

_____ Project does not involve the provision of supportive services

2. **Households/Clients Served:** Briefly describe the specific population to be served, including target income level and special needs populations, as applicable.

3. **Indicate the unduplicated number of units/household to be served**



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

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Reviewer's Comments:

Score:



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

PART III: PROJECT SITE CONTROL, ZONING, & ENVIRONMENTAL ISSUES

1. Site Control is in the form of:

- Deed
- Purchase Agreement
- Option (Expiration Date _____)
- Other _____

a. Please Attach Written Documentation of Site Control

2. Site is currently zoned: _____

a. Please Attach Written Verification of Zoning Designation

3. Is the zoning appropriate for your project?

Yes No

If no, is rezoning currently in process and when is it anticipated that this issue will be resolved?

Date _____

4. Describe what, if any, Environmental Assessment activities have been conducted.

a. Please attach a copy of any environmental findings/reports received.

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Reviewer's Comments:	Score:



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

PART IV: PROJECT FINANCING

1. Please Attach the Following Items

- Sources and Uses of all funds
- Development Budget
- Project 5-Year Pro-Forma (Not required for Homeownership projects)
- Cash Flow Statement

2. Please describe the specific use of Housing Trust Fund dollars (i.e.:

3. If the project utilizes Tax Credits, have the Tax Credits been awarded?

_____ Yes _____ No

If Yes, attach notice of Tax Credit award.

4. Has the project secured a firm commitment from a construction lender?

_____ Yes _____ No

5. Has the project received a conditional commitment from a construction lender?

_____ Yes _____ No



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

6. Provide the following information and attach written verification of any commitments received. If you do not have any commitments, provide the name of the lender you are working with.

Lender Name _____ Phone number _____

Contact Person _____

Address _____

Commitment Amount \$ _____ Rate/Term _____

7. Identify the project total amount of other funds (private and/or public) that would be leveraged by the Housing Trust Fund dollars?

Funding Source	Amount Leveraged
	\$
	\$
	\$
	\$
	\$
	\$
	\$
TOTAL FUNDS LEVERAGED	\$

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Reviewer's Comments:	Score:



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

PART V: CAPACITY AND EXPERTISE

1. **Has your agency previously undertaken this type of project before?**

_____ Yes _____ No

a. **If yes, identify the three most recent projects completed:**

2. **Identify the staff responsible to complete the project and indicate any experience specifically related to this project**

3. **Briefly summarize the project management plan. Identify the staff or agency responsible for ongoing project management and any experience specifically related to this project. (Does not apply to Homeownership Programs)**

Attach copy of Management Plan.



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

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Reviewer's Comments:

Score:

PART VI: FURTHERANCE OF HOUSING TRUST FUND GOALS

1. **Describe the accessibility improvements or modifications that are in excess of what are required by the Fair Housing Act, Section 504, please provide an estimated cost.**

2. **Explain how this project serves the lowest-income segment of the population:**

3. **Does the project affordability period exceed the minimum period required by the Housing Trust Fund (please refer to page 3)?**

Yes No

Affordability Period Required by HTF: _____ (years)

Affordability Period Proposed for Project: _____ (years)



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

4. **Will this project utilize workers from the neighborhood?**

_____ Yes _____ No

a. **If yes, please describe:**

5. **Will this project give priority to emerging business enterprise contractors?**

_____ Yes _____ No

a. **If yes, please describe:**

6. **Does this project increase the diversity of housing types in the neighborhood?**

Responses to this question should describe how the proposed project will provide a new type of housing choice in the neighborhood in which it is situated.

_____ Yes _____ No

a. **If yes, please describe:**



CITY OF MILWAUKEE HOUSING TRUST FUND

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6. Will this project utilize green building principles?

_____ Yes _____ No

a. If yes, please describe:

7. Will this project coordinate with and enhance the work of other entities in the neighborhood, such as employers, business improvement districts, schools, job training agencies or social service agencies?

Example #1: Developers may have an MOU with a job training agency, agreeing to help train and/or employ the agency's clients – either in the construction of the project or in the ongoing management and operations of the project.

Example #2: Developers may have sited their project in a specific location as a result of discussions with neighborhood employers that have identified the lack of suitable affordable housing for their employees as a concern.

_____ Yes _____ No

a. If yes, please describe:



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

8. Will this project proactively facilitate the movement of persons from institutions into the community?

_____ Yes _____ No

- a. If so, how?

9. Will the project use contractors who pay family-supporting wages for all workers on the project (family supporting wages are defined as \$8.46 per hour)?

_____ Yes _____ No

- a. If yes, please describe:

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Score:



CITY OF MILWAUKEE HOUSING TRUST FUND

APPLICATION FOR FUNDING 2008

PROPOSAL CHECKLIST - YEAR 2008

COMPLETED APPLICATIONS AND REQUIRED ATTACHMENTS MUST BE PHYSICALLY RECEIVED AND TIME-STAMPED AT THE COMMUNITY DEVELOPMENT GRANTS ADMINISTRATION OFFICE **NO LATER THAN 4:00 P.M. ON MONDAY, OCTOBER 27, 2008.** NO EXTENSIONS WILL BE GRANTED. SUBMIT THE ORIGINAL AND **FIFTEEN (15) COPIES** TO:

Mr. Steven L. Mahan, Director
Community Development Grants Administration
200 East Wells Street, Room 606
Milwaukee, Wisconsin 53202

Faxed or electronic applications will not be accepted. All proposals received after the closing date noted above will be returned to the applicant without review.

PLEASE BE CERTAIN TO

- Complete and submit *1 original and 15 unbound copies* of all documents:
- Attach all required supporting documentation as requested in the application.
- If you are applying for more than one activity, you must submit a separate application with all required documentation.
- Follow the prescribed format for Application preparation closely. Present information in the order indicated.
- If you replicate this application, it must be consistent in all aspects with the original Housing Trust Fund Application
- Do not submit materials other than those specifically requested. Letters of Support and Appendices submitted will be discarded.

If your Application is funded, some additional documentation will be required prior to executing a contract between the City of Milwaukee and your organization.

ATTACHMENT A

**CITY OF MILWAUKEE HOUSING TRUST FUND
INCOME LIMITS - 2008**

Income Level	Applicability	Household Size							
		1	2	3	4	5	6	7	8
50% of CMI	Rental and/or Homeless Housing Projects (Any Amount of HTF Assistance)	23,700	27,100	30,450	33,850	36,550	39,250	41,950	44,700
65% of CMI	Owner-Occupied Housing - Substantial Projects (HTF Assistance More than \$5,000)	30,794	35,181	39,609	43,997	47,531	51,025	54,559	58,094
100% of CMI	Owner-Occupied Housing - Modest Projects Including Acquisition & Rehabilitation, Acquisition, New Construction or Rehabilitation of Owner-Occupied Housing (HTF Assistance is \$5,000 or less)	47,375	54,125	60,938	67,688	73,125	78,500	83,938	89,375

1. Income Limits are based on the HUD HOME Program Limits and are subject to change annually.

Revised: 04/08

ATTACHMENT B

**CITY OF MILWAUKEE HOUSING TRUST FUND
RENT LIMITS AND UTILITY ALLOWANCE SCHEDULE - 2008**

BEDROOM SIZE: Maximum allowable rent if all following utilities are paid by Landlord	BUILDING TYPE: Detached Single						BUILDING TYPE: Duplex						BUILDING TYPE: Three or More Units								
	0BD	1BD	2BD	3BD	4BD	6BD	0BD	1BD	2BD	3BD	4BD	5BD	6BD	0BD	1BD	2BD	3BD	4BD	5BD	6BD	
1. HEATING	\$558	\$635	\$761	\$890	\$981	\$1,083	\$1,194	\$558	\$635	\$761	\$890	\$981	\$1,083	\$1,194	\$558	\$635	\$761	\$890	\$981	\$1,083	\$1,194
Gas	\$29	\$36	\$58	\$71	\$85	\$97	\$110	\$27	\$33	\$54	\$66	\$79	\$90	\$103	\$25	\$31	\$50	\$61	\$73	\$83	\$95
Oil	\$66	\$80	\$131	\$162	\$191	\$221	\$252	\$61	\$74	\$122	\$151	\$177	\$206	\$234	\$56	\$69	\$113	\$139	\$164	\$190	\$217
Electric	\$36	\$44	\$72	\$88	\$102	\$119	\$135	\$33	\$41	\$67	\$82	\$95	\$111	\$125	\$31	\$38	\$62	\$76	\$88	\$102	\$116
2. WATER HEATING	\$8	\$10	\$12	\$15	\$16	\$19	\$22	\$8	\$10	\$12	\$15	\$16	\$19	\$22	\$8	\$10	\$12	\$15	\$16	\$19	\$22
Gas	\$20	\$23	\$28	\$34	\$40	\$46	\$51	\$20	\$23	\$28	\$34	\$40	\$46	\$51	\$20	\$23	\$28	\$34	\$40	\$46	\$51
Oil	\$14	\$18	\$23	\$28	\$32	\$36	\$40	\$14	\$18	\$23	\$28	\$32	\$36	\$40	\$14	\$18	\$23	\$28	\$32	\$36	\$40
Electric	\$15	\$22	\$28	\$31	\$34	\$37	\$40	\$15	\$22	\$28	\$31	\$34	\$37	\$40	\$15	\$22	\$28	\$31	\$34	\$37	\$40
3. LIGHTING/ REFRIGERATION	\$5	\$6	\$7	\$8	\$9	\$10	\$11	\$5	\$6	\$7	\$8	\$9	\$10	\$11	\$5	\$6	\$7	\$8	\$9	\$10	\$11
Gas	\$5	\$7	\$9	\$10	\$11	\$12	\$13	\$5	\$7	\$9	\$10	\$11	\$12	\$13	\$5	\$7	\$9	\$10	\$11	\$12	\$13
Electric	\$16	\$16	\$18	\$28	\$31	\$33	\$36	\$16	\$16	\$18	\$28	\$31	\$33	\$36	\$16	\$16	\$18	\$28	\$31	\$33	\$36
5. WATER & SEWER	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12	\$12
TRASH /SNOW&ICE	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1
6. STOVE	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2	\$2
7. REFRIGERATOR	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7	\$7
8. FIXED CHARGES	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10
Electric																					
Gas																					

Note: 1. Rent Limits are based on the HUD Low HOME Rent Limits and are subject to change annually.
2. Utility allowances determined by HACM and are subject to change annually

ATTACHMENT C

CITY OF MILWAUKEE HOUSING TRUST FUND
Scoring Point System - Final Draft Recommendation

	Max 100 Pt Scale(a)	
	Point Range	Max Points
Leveraged Dollars		15
HTF dollars are less than 3% of total project cost	15	
HTF dollars account for 3 - 5% of total project cost	12	
HTF dollars account for 6 - 10% of total project cost	9	
HTF dollars account for 11 - 15% of total project cost	6	
HTF dollars are more than 15% of total project cost	3	
Income Targets - Please Use Attached Chart		15
# of units with residents up to 50% of income target	15	
# of units with residents between 51% and 70% of income target	12	
# of units with residents between 71% and 75% of income target	9	
# of units with residents between 76% and 85% of income target	6	
# of units with residents between 86% to 100% of income target	3	
Affordability Period		10
Meets HTF Affordability Period	1	
Exceeds HTF Affordability Period by 25%	2	
Exceeds HTF Affordability Period by 50%	5	
Exceeds HTF Affordability Period by 75%	8	
Exceeds HTF Affordability Period by 100% or more	10	
Use of City of Milwaukee (resident) workers (Total Project)		5
Less Than 18% Milwaukee (resident) workers	-5	
18% Milwaukee (resident) workers	1	
24% Milwaukee (resident) workers	2	
30% Milwaukee (resident) workers	3	
36% Milwaukee (resident) workers	4	
More than 36% Milwaukee (resident) workers	5	
Use of City, County, or State EBE (Total Project)		5
Less Than 18%	-5	
18% EBE	1	
24% EBE	2	
30% EBE	3	
36% EBE	4	
More than 36% EBE	5	
Neighborhood Diversity		5
Project Increases diversity of housing types in the neighborhood	5	
Green Building Principles		5
Project Utilizes Green building Principles	5	
Coordination with Community Institutions		5
Project is Coordinated with Community Institutions	5	
Community Integration		5
Move persons from institutions to community	5	
Family Supporting Wages (applies to entire project)		5
Vendor/Contractor pays employees a minimum of \$8.46 to \$10.46 per hour	1	
Vendor/Contractor pays employees a minimum of \$10.47 to \$12.46 per hour	2	
Vendor/Contractor pays employees a minimum of \$12.47 to \$14.46 per hour	3	
Vendor/Contractor pays employees a minimum of \$14.47 to \$16.46 per hour	4	
Vendor/Contractor pays employees a minimum of \$16.47+ per hour	5	
Experience		10
Agency experience with same type/similar project	2	
Staff experience with same type/similar project	4	
Management Agency Experience	4	
Accessibility Improvements or modifications		5
Meets Minimum Standards	1	
Exceeds Minimum Standards	5	
Service Partners (b)		5
Provision of services on site w/out use of HTF \$	5	
Construction Financing		5
Construction Loan is Firmly Committed	5	
Construction Loan is Conditionally Committed	2	
Construction Loan is not Identified	0	
Proposal Meets Community Needs (Subjective)		15
TBD by Reviewer	0-15	
Total Points		100

NOTE: All proposals must receive at least fifty (50) points for further consideration

- (a) 100 point maximum applies to projects requiring on-site services such as Shelter + Care. Maximum points available for all other projects is 95.
- (b) Only applies to projects requiring on-site services such as Shelter + Care

APPENDIX B

City of Milwaukee

Office of the City Clerk

200 E. Wells Street
Milwaukee, Wisconsin 53202

Certified Copy of Resolution

FILE NO: 080216

Title:

Resolution authorizing the acceptance and expenditure of up to \$250,000 in private contributions by the Department of Administration, Community Development Grants Administration Division for the Housing Trust Fund.

Body:

Whereas, Section 304-24 of the City of Milwaukee Code of Ordinances regulates the receipt, appropriation and expenditure of contributions received by the City; and

Whereas, There are organizations interested in making contributions to the City of Milwaukee's Housing Trust Fund; and

Whereas, It is in the City's best interest to augment sources of trust fund revenue to achieve the goal of acquisition, construction, rehabilitation and modification of affordable and accessible housing for low-income households; now, therefore, be it

Resolved, By the Common Council of the City of Milwaukee, the Department of Administration, Community Development Grants Administration Division is authorized to accept up to \$250,000 in private contributions associated with the City of Milwaukee's Housing Trust Fund; and, be it

Further Resolved, that upon receipt and deposit of these funds, the City Comptroller is directed to establish a special account with the Department of Administration for the expenditure of the funds; and, be it

Further Resolved, That the City Comptroller is authorized and directed to transfer appropriations from the special Purpose Account-Contributions, 0001-2110-0001-D000-006300, and the estimated revenue from the Estimated Revenue Account-Contributions, 0001-9990-0001-009850 to the Department of Administration special account, 0001-1510-0001-006300-Dxxx and the Department of Administration Estimated Revenue Account, 0001-1510-0001-009850, up to the amount actually received, but no more than \$250,000; and, be it

Further Resolved, That the Department of Administration, Community Development Grants Administration is authorized to expend funds actually received for housing purposes associated with the City of Milwaukee's Housing Trust Fund in accordance with Chapter 316, Milwaukee Code of Ordinances, which governs the operation and funding of the Housing Trust Fund, but not to exceed \$250,000.



I, Ronald D. Leonhardt, City Clerk, do hereby certify that the foregoing is a true and correct copy of a(n) Resolution Passed by the COMMON COUNCIL of the City of Milwaukee, Wisconsin on July 1, 2008.

Ronald D. Leonhardt

Ronald D. Leonhardt

April 23, 2009

Date Certified

APPENDIX C

City of Milwaukee

Office of the City Clerk

200 E. Wells Street
Milwaukee, Wisconsin 53202

Certified Copy of Resolution

FILE NO: 080645

Title:

Substitute resolution relating to the appropriation of \$10,000 from the Housing Trust Fund account to the Local Initiatives Support Corporation and the Public Policy Forum to fund a study titled "A Sustainable Approach to Creating and Administering Low-Income and Special Needs Housing in Milwaukee County."

Body:

Whereas, The Local Initiatives Support Corporation ("LISC") and the Public Policy Forum are working together to explore policy options for creating a sustainable public infrastructure for the development of affordable housing in Milwaukee County and for effective administration of affordable housing programs; and

Whereas, In response to a request from LISC for research assistance on this topic, the Public Policy Forum has proposed to conduct a study that would:

1. Review and analyze the existing affordable housing programs in the City of Milwaukee and Milwaukee County, including a summary of the strengths and challenges of these programs.
2. Review a selected group of housing trust fund and housing program administration models in other metropolitan areas, including a discussion of the potential barriers and benefits associated with replicating these models in Milwaukee.

; and

Whereas, The Public Policy Forum has indicated that the total cost of this research project, which will take approximately six months to complete, is \$29,970; and

Whereas, In a June 23, 2008, letter to Ald. Michael Murphy, LISC requested that the City of Milwaukee consider providing up to \$10,000 to support this project; and

Whereas, On August 14, 2008, the Housing Trust Fund Advisory Board approved a motion recommending the appropriation of \$10,000 from the Housing Trust Fund for a grant to fund the study proposed by LISC and the Public Policy Forum; and

Whereas, The appropriation of Housing Trust Fund dollars to support the LISC/Public Policy Forum project is consistent with the established purpose of the Housing Trust Fund, as stated in s. 316-1 of the Milwaukee Code of Ordinances; and

Whereas, It is anticipated that LISC and Milwaukee County will provide the other two-thirds of

APPENDIX D

HOUSING TRUST FUND
Application Intake Sheet - November 2008

Agency Name	Funding Category	Amount Requested
ACTS Community Development Corp.	Home Ownership - Owner Occupied Rehabilitation	100,000
Bishop's Creek Family Housing Fund	Rental Housing - New Construction	500,000
Community Advocates, Inc.	Homelessness - New Construction of Facility	350,000
Dominican Center for Women, Inc.	Home Ownership - Owner Occupied Rehabilitation	147,000
Elizabeth Gilliam	Home Ownership - Owner Occupied Rehabilitation	10,000
Gorman & Company	Rental Housing - Rehabilitation of Existing Structure	175,000
Gorman & Company	Rental Housing - New Construction	180,000
Intercession, Inc.	Homelessness - New Construction of Facility	150,000
Layton Blvd West Neighbors, Inc.	Rental Housing - New Construction	200,000
Layton Blvd West Neighbors, Inc.	Home Ownership - Rehabilitation of Existing Structure	14,000
Martin Luther King Economic Development Corp.	Rental Housing - New Construction	200,000
Midwest Affordable Housing Corp. (Prince Hall)	Rental Housing - New Construction	500,000
Midwest Affordable Housing Corp. (Prince Hall)	Other Needs	200,000
Milwaukee Christian Center - Handicap Accessibility Project	Home Ownership - New Construction	66,000
Milwaukee Christian Center - NIP	Home Ownership - Owner Occupied Rehabilitation	126,000
Milwaukee Christian Center-Youth,(A WI Fresh Start Initiative)	Home Ownership - New Construction	40,000
Milwaukee Community Service Corps.	Home Ownership - Rehabilitation of Existing Structure	21,800
Milwaukee Community Service Corps.	Home Ownership - New Construction	11,400
Milwaukee Community Service Corps.	Other Needs	33,750
Milwaukee Habitat for Humanity	Home Ownership - New Construction	200,000

HOUSING TRUST FUND
Application Intake Sheet - November 2008

Agency Name	Funding Category	Amount Requested
Milwaukee Habitat for Humanity	Home Ownership - Rehabilitation of Existing Structure	100,000
Our Space Inc.	Rental Housing - New Construction	350,000
Rebuilding Together Greater Milwaukee	Home Ownership - Owner Occupied Rehabilitation	75,000
Star United Townhomes, LLC	Home Ownership - New Construction	302,000
United Community Center, Inc.	Homelessness - New Construction of Facility	75,000
Volunteers of America National Services	Rental Housing - New Construction	250,000
William A Passavant RCAC, LLC	Rental Housing - Rehabilitation of Existing Structure	250,000
William A Passavant RCAC, LLC	Rental Housing - New Construction	226,000
	Total	4,852,950

