

RFP# AAHC-21-A

Co-Developer Proposal for 121 E Catherine

Submitted to:

City of Ann Arbor
Ann Arbor Housing Commission
200 S Industrial Hwy
Ann Arbor MI 48104

Submitted by:

Avalon Nonprofit Housing Corporation
1327 Jones Dr., Suite 102
Ann Arbor, MI 48105

December 07, 2021



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DEVELOPMENT INTRODUCTION



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December 7, 2021

Ann Arbor Housing Commission
2000 S. Industrial Highway
Ann Arbor, MI 48104

Dear Selection Committee:

This proposal is being submitted by Avalon Nonprofit Housing Corporation, dba Avalon Housing, Inc. in response to: RFP# AAHC-21-A Co-developer(s) for 121 E Catherine and 353 South Main.

Aubrey Patiño, as Executive Director, and Wendy Carty-Saxon, as Director of Real Estate Development, both certify that we are responsible for the decision regarding the elements being offered in the Proposal and we have not and will not participate in any action contrary to the terms of this provision. We also hereby acknowledge receipt of Addendum No. 1 to RFP No. AAHC-21-A.

We are submitting a proposal for the 121 E. Catherine site only.

Together with our development team, we are pleased to propose a development of a six-story, multi-use building with sixty-eight (68) units of affordable housing on this site. We are proposing half the units as supportive housing and the other half as affordable housing with an anticipated preference for households involved in the arts. We are very excited about bringing this mix of housing to the community.

We are grateful for the City and AAHC's commitment over the years to affordable and supportive housing. And are so excited to see this RFP for the development of City-owned lots.

We appreciate your consideration and are looking forward to future discussions regarding our proposal.

Sincerely,

Aubrey Patiño
Executive Director

Wendy Carty-Saxon
Director of Real Estate Development



REFERENCES



Municipal references

**Chris Taylor,
Mayor**

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734-794-6165

**Teresa Gillotti,
Director**

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Ypsilanti, MI 48197
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Financial Institutions

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Commercial Rel Mgr II,
Vice Principal**

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**Jim Wolfington,
Loan Officer**

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Chelsea, MI 48118
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734-385-1131

LIHTC references

**Kristen Senff,
VP—Organizations**

National Equity Fund
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Columbus, OH 43220
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**Chad Besnon,
Director of Development**

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bensonc@michigan.gov
517-335-9874

PROJECT NARRATIVE/ PROJECT SUMMARY

Project Narrative Continued

We are excited to convey our development vision for 121 E. Catherine. Situated in the midst of a vibrant Ann Arbor community, near the Ann Arbor Farmers Market, Kerrytown Shops, government buildings, and a variety of other new and established community businesses, our proposed development enhances this unique local neighborhood.

Our proposal provides a six-story mixed-use building. All 68 residential units are affordable for tenants who earn at or below 60% of Area Median Income. We continue our community's efforts to address homelessness by committing half of our units as supportive housing. We take inspiration from the strong arts community in Ann Arbor and are proposing that the other half of our units have a preference for artists who qualify for workforce housing. As an experienced supportive housing developer, Avalon is excited to partner on this development with Artspace, the national leader in providing affordable housing targeted to the arts community.

Our ground floor design serves residents with a residential lobby and common areas and adds vibrant outward-facing retail. One of our anticipated ground-floor uses, an art gallery, reflects the artists' housing above and also complements key nearby arts institutions. Our other proposed ground-floor use is a small-business incubator that can assist MBE/WBE enterprises. This incubator would create a unique retail activity that supports the RFP's request to honor the neighborhood's history as a center of African American entrepreneurship. We also envision that the creation of a public art mural along Catherine Street, as well as the naming of the development, can flow from our community engagement efforts.

We are proposing a 61,341 square foot L-shaped building that is designed to maintain the urban fabric along the sidewalks, while minimizing impact on neighbors to the north. The first floor stays tight to the walks as it moves up to the third floor, but steps back at the fourth floor and above. The 68 residential units include 15 efficiencies, 48 one- and 5 two-bedroom apartments. There is tenant community space and a usable roof deck at the top level. This development includes significant green infrastructure, including all electric, rooftop solar, and a building shell that minimizes air infiltration and maximizes heating and cooling efficiency. We provide 24 units of public parking, including electric vehicle charging stations, a pedestrian pathway through our site to the Farmers Market and nearby amenities, and EV carshare for residents.

Our project team is skilled across all of these elements. Avalon has been developing supportive housing in Ann Arbor since 1992, and now has 28 properties with 364 units. Three of our properties have full Enterprise Green Communities (EGC) certification, with two more currently pending. We are partnering with Landon Bone Baker Architects (LBBA), a full-service architectural firm that has designed over 5000 units of affordable and supportive housing, along with associated social spaces for programs and services, including similar scale urban developments. LBBA is also experienced in green and passive housing design techniques, designing the first multi-family building in the City of Chicago certified as Passive House Institute US+ (PHIUS+). Our General Contractor, Wolverine Building Group, has projects that include affordable, downtown sites with complex site logistics and efficient construction methods. Wolverine has experience with green building projects, including LEED, EGC, and Living Building Challenge. Macon Engineering, our civil engineer, has extensive experience working in the City of Ann Arbor, particularly on tight downtown sites such as Catherine. Elevate, our green consultant, and their partner New Ecology, have certified over 40 affordable housing developments, including EGC and PHIUS for both new construction and rehab. They have extensive experience as energy consultants, working on over 1,800 LIHTC properties in the past 5 years. 10 of Elevate's projects were Permanent Supportive Housing. Artspace will serve as our consultant for the artist housing and gallery space. Artspace's experience includes 45 LIHTC developments in 22 states and Washington DC, focused on artist housing and programming. Loomis, our attorney, has been recognized for the past three decades as premier counsel, providing advice in Michigan and other states regarding various forms of financing including through MSHDA, HUD, FHLB, and conventional sources, among others.

We are planning extensive community engagement that builds on engagement we've already begun with nearby art and small business development institutions, both as part of the site plan design and review process, and as part of designing active ground floor space.

PROJECT NARRATIVE/ PROJECT SUMMARY

Project Narrative Continued

We are proposing a co-developer and a co-ownership structure between Avalon and AAHC. The development utilizes 9% LIHTC funding and supplements these funds with additional support from DDA Infrastructure and Housing funds, County HOME funds, City Millage fund, FHLB AHP, County Brownfield funds and CDBG infrastructure funds (as applicable), along with construction and permanent financing. We also anticipate a PILOT for this development and would apply for vouchers for the supportive housing units, ensuring they are affordable. Our schedule includes entitlements in 2022, funding applications and awards in 2023, a 16 month construction schedule, followed by lease up in the first half of 2025.

Project Summary

Avalon Housing is proposing a 6-story mixed-use building that includes 68 residential units, 2,068 sf of ground floor retail space and 24 spaces of public parking. Tenant common areas include 2,472 sf on the ground floor as well as roof top patio and small common room. All units are affordable to households with incomes at or below 60% AMI, with half targeted as supportive housing and half with a preference for income-eligible artists. Proposed retail uses include an art gallery and a small-business incubator. Construction emphasizes compatibility with the immediate neighborhood and sustainable features.

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A. PROFESSIONAL EXPERIENCE



A.1. CO-DEVELOPER RESPONDENTS DESCRIPTION

Avalon Housing is a Washtenaw County community-based, 501c3, non-profit organization that was created in 1992 to develop, own, and manage permanent supportive housing. Avalon's mission is to provide affordable housing and support services for Washtenaw County's lowest income households, with a priority on those experiencing homelessness, particularly those most in need of supportive housing. Avalon has developed, and currently owns and operates 364 units of supportive housing at twenty-eight (28) locations throughout Washtenaw County, with an additional 24 units currently under construction. All but two of these properties are located in the City of Ann Arbor. Avalon has developed nine (9) properties, totaling 214 units, using Low Income Housing Tax Credits. Avalon has also gone through a successful resyndication of one of our older tax credit properties. Avalon has closed on another tax credit property with twenty-four (24) units currently under construction, and has an additional three (3) properties, including eighty-four (84) units, in our current development pipeline.

Avalon proposes to be the Co-Developer for Catherine Street, along with the entity controlled by Ann Arbor Housing Commission. Consistent with our other tax credit developments, Avalon would form a new entity to be part of the General Partner. Avalon would have 100% ownership in this entity. As noted in the RFP, we understand the Ann Arbor Housing Commission will be the sole member of its own newly created entity that would also be part of the General Partner. Together the Avalon entity and the AAHC entity will form the new managing general partner in the LDHA LP. Avalon is proposing to remain part of the Ownership structure throughout the entire 15 year compliance period. This is consistent with our commitment to the proposed population. In addition, it also positions us to achieve the maximum tax credit general partner experience points in a MSHDA LIHTC application.

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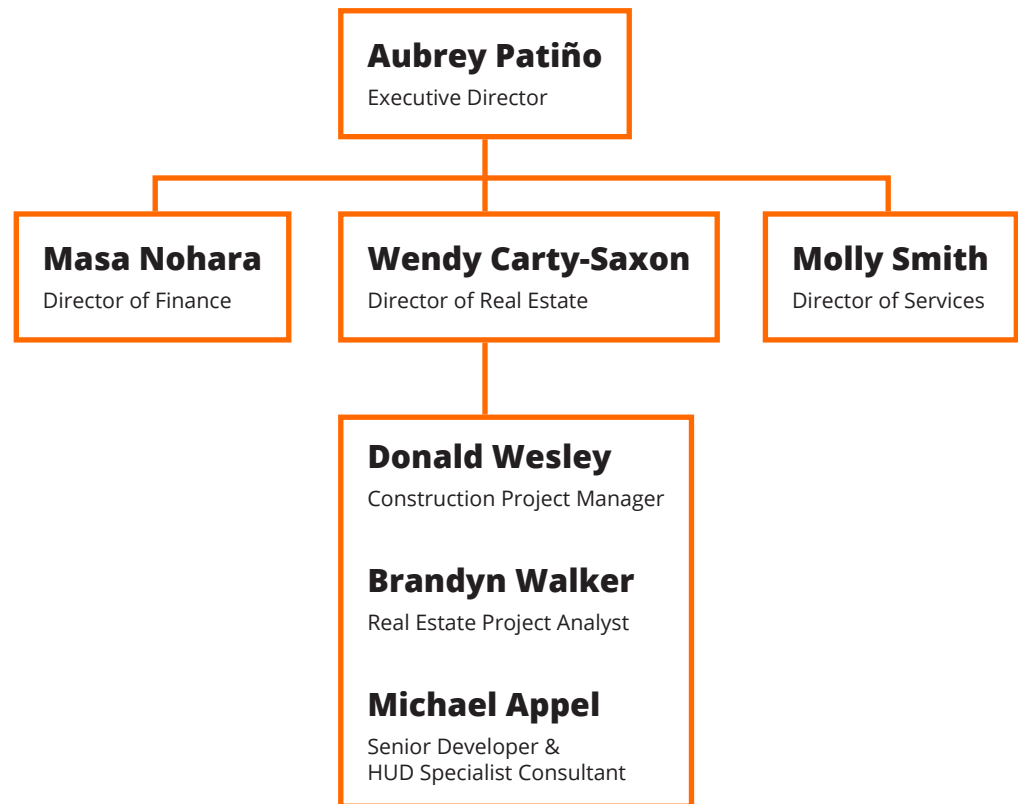
A.1. CO-DEVELOPER RESPONDENTS DESCRIPTION

We have included a chart in Section A4 that further outlines our proposed ownership structure.

Avalon will serve as co-Developer, co-General Partner, a Guarantor, and Supportive Housing Services Provider. Avalon benefits from having a stable and experienced housing development staff. Critical Avalon team members include the following:

- Aubrey Patiño, Executive Director
- Wendy Carty-Saxon, Director of Real Estate Development
- Michael Appel, Senior Developer
- Donald Wesley, Construction Project Manager
- Brandyn Walker, Real Estate Project Analyst
- Molly Smith, Director of Services
- Masa Nohara, Finance Director

Avalon Housing Organizational Chart re: Catherine Street Application



Wendy Carty-Saxon will serve as project lead and primary staff interacting with the AAHC, along with Aubrey Patiño, Michael Appel and Donald Wesley with input and assistance as needed with the rest of the Avalon key staff, along with our other development team members.

Avalon Housing is a 501c3 non-profit with no legal relationship to other team members. All staff listed above are employees of Avalon with no private interests in the development. An organizational chart and text describing the proposed ownership structure for this development appears in Section A.4.



A.2. DEVELOPMENT TEAM EXPERIENCE AND CAPACITY

Roles of Development Team Members

Avalon has assembled a strong development team—suited to the specifics of this site and our proposal. Resumes for Development Team members are included with the Attachments. Our Catherine Street Development Team includes the following.

Avalon Housing, Inc.
*Developer;
Co-General Partner
Supportive Services Provider*

Avalon will serve as Co-Developer with the Ann Arbor Housing Commission. Avalon will undertake the Co-Developer responsibilities as set forth in the RFP including predevelopment and due diligence, hiring the project team, obtaining entitlements and working closely on community processes, developing project budgets and schedules, obtaining financing, providing applicable guarantees, furthering Section 3, MBE and WBE participation and Davis Bacon compliance, construction management oversight and project management through submission of 8609s to MSHDA with assistance from, regular communication and coordination with, and reports to the AAHC. Avalon will also provide on-going supportive housing service throughout the fifteen-year compliance period.

**Landon Bone
Baker Architects**
Architect

Landon Bone Baker Architects (LBBA) will serve as the project architect for this development. LBBA's work scope will include, but not be limited to: preliminary development and schematic design including initial zoning/entitlement work with the City of Ann Arbor, assisting in leading the Community Engagement process, development of drawings and documents for building permit review as well as bid and construction, and ultimately construction observation for the duration of the project. LBBA will work with other team members to ensure our development serves the needs of the tenants, community and achieves high green standards. LBBA will also enlist Michigan-based mechanical, electric, plumbing and structural engineers with expertise in this type of construction, including the green commitments. Please find qualifications and resumes for both IMEG Corp. (Structural Engineers) and Strategic Energy Solution Inc. (MEP Engineers) in the appendix.

**Wolverine
Building Group**
General Contractor

Wolverine Building Group will serve as the general contractor, assisting with cost estimates, providing cost effective and construction techniques to be incorporated into the design documents, overseeing the bidding process and ensuring Davis Bacon, Section 3 and EEO requirements are met, overseeing subcontractors, developing and adhering to project construction budget and schedules.

Macon Engineering LLC
Civil Engineer

Macon will provide civil engineering, site planning, construction plans, contract administration, site inspections, utility design, and engineering plan review.

Elevate
Green Consultant

Elevate, in partnership with New Ecology, Inc., will work closely with Avalon Housing's project team to achieve a minimum of Enterprise Green Communities Plus Certification under the 2020 Enterprise Green Communities Criteria. We will also evaluate whether achieving Passive House Institute US Certification is viable and cost-effective. Our approach to the certification process is to provide a comprehensive suite of services that ensure the Enterprise Green Communities Plus and PHIUS standards applicable to the property are well understood by the project team and properly installed. Our integrated project team kick-off meeting and pre-build submission activities set the stage for comprehensively designing the building according to the Enterprise Green Communities Plus and PHIUS standards and for establishing an integrated design process. Our integrated design strategy seeks to balance best practices with project constraints while maximizing energy and water savings and the integration of renewable energy. Our onsite activities, including construction inspections and rater services, will ensure that the "green" upgrades are correctly installed. Lastly, our project close-out activities, including development of resident and operations and maintenance manuals, setting up a mechanism to benchmark energy use on an on-going basis, and post-build submission will ensure the property receives a minimum of Enterprise Green Communities Plus Certification and reaches for PHIUS.

ArtSpace
Consultant

ArtSpace is a national non-profit organization headquartered in Minneapolis that uses the tools of real estate development to create affordable places where artists can live and work, as well as a national consultant for space-related strategies and arts consultancy. ArtSpace is adept at providing consulting that advances the following development related services: Development, Property Management, and Asset Management. ArtSpace will assist the development team, and those in the local arts community who are supporting this initiative, to create the appropriate physical spaces and implement the proper operational policies to achieve desirable and sustainable affordable housing options for artists

**Loomis, Ewert, Parsley,
Davis, & Gotting, P.C.**
Attorney

Loomis will provide legal work, including working with us to establish the new ownership entities, limited partnership agreements, and the various documents required for closing.

A.2. DEVELOPMENT TEAM EXPERIENCE AND CAPACITY

Avalon Housing Experience

Experience of Development Team Members

Avalon has developed twenty-eight (28) properties, with 364 units, all in Washtenaw County. Our most recently completed new construction development consisted of two phases: Hickory Way Apartments Phases I and II, located on the far west side of Ann Arbor. Together they contain 70 units in two (2), three-story buildings with elevators and a central hall. We have completed two other new construction developments within the City: Carrot Way Apartments at 30 units; and Pauline Apartments at 32 units. We have a 24-unit new construction development underway in the City of Dexter, scheduled for completion in early 2022. We are waiting to hear if we have been awarded low income housing tax credits, the final piece of funding needed, for The Grove at Veridian, our fifty-unit new construction development. Avalon served as sole developer and had 100% control of the general partner for each of these developments. These developments also involved varying degrees similar funding that we anticipate here: Low Income Housing Tax Credits, County Home, Federal Home Loan Bank AHP funds, City of Ann Arbor Millage or Housing Funds, Conventional construction loan, Conventional permanent loan, Project-based subsidies, PILOT, and pre-development funding among other sources. (Please find additional information on Avalon's experience, as well as Funding Award Letters in the Attachments.)

As our developments have been low-rise development, we have brought in a project team including the architect, general contractor, civil engineer, and consultants that all have ample experience with mid-rise downtown buildings. Additional information is provided with the resumes in the attachments

Avalon also brings thirty (30) years property management experience with us. We manage all of our 28 properties. Our Director of Property Management has over twenty years of experience with homelessness services, outreach and supportive housing property management. She has been providing property management at Avalon for sixteen years, including 4 years as Director. We understand that the Ann Arbor Housing Commission will be providing property management at this site. Our long-term experience with in-house property management proves invaluable to informing our development process—including our choices on material durability and selections and our operating proformas. We clearly understand that choices made up front during the development process have long-term operating implications and work to bring in those perspectives early in the process. Our property management team also by necessity is familiar with layering multiple funding sources in these development deals. We have worked with Premier Property Management LLC on our recent tax credit deals. We are happy to add our input on property management during this process, to the extent AAHC would find it helpful.

In addition to the housing development funding listed above, Avalon has also received funding from the Washtenaw County Brownfield Redevelopment Authority (both Environmental Assessment and Local Brownfield Revolving Fund), Downtown Development Authority housing funds, and Project-based vouchers from the Ann Arbor Housing Commission, Jackson Housing Commission, and MSHDA. Avalon's Ann Arbor new construction developments have required site plan and zoning approvals from the City of Ann Arbor, as well as approvals and permits throughout the construction process.

Avalon has experience with both National Equity Fund and Cinnaire as project syndicators. Conventional lenders we have worked with include Chelsea State Bank, Old National Bank, Huntington Bank, Level One, and Bank of Ann Arbor among others. Avalon has also received permanent loans from MSHDA, non-profit lenders and CDFIs. Avalon has included a list of our completed developments with the attachments to this submission. We have completed both acquisition rehabs and new construction developments.

Avalon has been using green building techniques at its properties for over a decade. Since 2011, our funding through Washtenaw County has included commitments to Enterprise Green Communities standards. This has impacted the rehabilitation and new construction of twelve (12) of our properties with 180 units. Avalon has achieved Enterprise Green Certification at three of these properties, with a total of ninety (90) units, and two more Avalon properties with sixty (60) units have received the EGC Pre-Build Certification and are anticipating full EGC Certification at final project close out. Avalon's pipeline development, The Grove at Veridian, is part of the International Living Future Institute Affordable Housing Pilot Program. We have committed to work toward making our Community Center Net Zero at this development. Avalon has also committed that our entire The Grove at Veridian development will be all electric, with no combustion. Avalon's recent new construction developments have already moved significantly toward electric developments with our three most recent developments, including ninety-four (94) units, having electric air source heat pumps for all of the units, with combustion limited to the common spaces. Avalon also installed a solar array at one of our developments in 2013.

A.2. DEVELOPMENT TEAM AND CAPACITY

Avalon Housing Experience Continued

In the past seven years we have been awarded the following:

- The Grove at Veridian (County HOME, FHLB AHP, City Millage Funds, State Enhancement Grant [LIHTC application is currently pending])
- Hilltop View Apartments (LIHTC, County HOME, FHLB AHP, AAHC and MSHDA PBVs, PILOT);
- Hickory Way Apts Phase I (LIHTC, County HOME, FHLB AHP, City Affordable Housing Funds AAHC and MSHDA PBVs, PILOT);
- Hickory Way Apts Phase II (LIHTC, County HOME, FHLB AHP, City Affordable Housing Funds, City Millage Funds, AAHC and MSHDA PBVs, PILOT);
- Sharon Ann Apartments (LIHTC, FHLB AHP, Jackson Housing Commission PBVs, PILOT)
- Arbordale Apartments (resyndication) (LIHTC, County HOME, FHLB AHP, MSHDA HOME, MSHDA Loan, MSHDA Preservation)
- GlenDex Duplexes (County HOME, Ann Arbor Affordable Housing Funds)
- 104/124 Glendale (County HOME, FHLB AHP)
- 108/110 Glendale (County HOME, FHLB AHP, Ann Arbor Affordable Housing Funds)

All of Avalon's developments are Permanent Supportive Housing. Avalon has been providing supportive housing services in-house since 2009 for our family units and since 2015 for our single adult units. Avalon has been a contracted service provider of Washtenaw County Community Mental Health as a Community Living Supports provider since 2015. We have also held a contract with the Community Mental Health Partnership of Southeast Michigan as a special initiatives provider within the substance use treatment system since 2015. In 2019, we became a licensed Substance Use Disorder (SUD) services provider. In addition, Avalon is part of the State Innovation Model, which aims to strengthen clinical and community linkages for high utilizers of the emergency room. Avalon began providing family services directly in 2009. In 2015, Avalon became accredited through the Council on Accreditation and significantly expanded our support services staff, including bringing in-house direct service provision to single adults, allowing us to better meet our mission of ending homelessness for people with disabilities. In 2018, we were reaccredited through an expedited process with zero findings by the COA auditors. Avalon has also been a lead agency in our CoC's successful applications to HUD. We have received grants for supportive housing services dating back to 1996. Avalon currently manages seven (7) grants through HUD's HEARTH program.

LBBA Experience

Landon Bone Baker Architects (LBBA) is a full-service architectural practice that has earned a strong reputation for bringing responsible, contextual design to multifamily affordable and mixed-income housing and neighborhood planning. We have designed over 5,000 units of affordable and supportive housing, along with associated social spaces for programs and services. The firm's portfolio of projects ranges from large to small scale urban developments; from single-room-occupancy buildings to affordable apartment rehabilitations; from daycare centers to comprehensive community redevelopment efforts. LBBA provides good design in a way that is engaging and respectful to residents, communities, and their neighbors. (Please find a sampling of ours and our consulting engineer's work in Michigan and around the Midwest in the Attachments).

LBBA is distinguished by our community-based approach, working closely with city officials, neighborhood organizations, CDC's, and developers of affordable and mixed-income housing to create the best possible solutions. The team responds to the context, program, budget, and community concerns while integrating sustainability and health initiatives through engaged collaboration. LBBA's goal is to design comfortable, attractive, secure, and livable environments that help keep residents rooted in their communities. Operating under the philosophy that every person should have a decent place to live and that communities must have comprehensive, sophisticated, and progressive urban design, LBBA designs creative and cost-conscious solutions that reflect the clients' program, site, historical issues, energy usage, and budget constraints.

Our familiarity with community development programs, applicable codes and requirements, and financing options which have helped LBBA establish a framework for best practice design and construction. More specifically, LBBA has been a team member in over 50 developments that have been awarded Low Income Housing Tax Credits (LIHTC) in 5 states in the Midwest. We are currently active on (4) projects that have been awarded LIHTC in Michigan. Our best practices include green initiatives, sustainable development programs, alternative material development, sustainable landscape design, and coordination with the general contractor as a cost-containment measure. We are team players both within our own organization, which includes associate architects, engineers, and technical consultants; and we are team players on the development team as a whole.

A.2. DEVELOPMENT TEAM AND CAPACITY

LBBA Experience Continued

We are committed to delivering high-quality architecture through innovative technology, energy efficiency, sustainability and with respect for client needs and project budgets. We have experience in delivering projects in all of the major certified sustainable programs and our goal is to define environmental objectives with our clients early in the process to achieve an integrated and cost-conscious design. In fact, LBBA was one of the first signatory firms signed onto the AIA 2030 Commitment—a challenge that calls for all new buildings, developments, and major renovations to be carbon-neutral by 2030. LBBA also recently completed the first multi-family PHIUS+ development in the City of Chicago with Latin United Community Housing Association.

Our practice also takes pride in collaborating to produce successful Supportive Housing. We work with client and stakeholders to understand how best to blend housing and services in a way that is safe and dignified while still feeling like home. The services provided and needed are always specific to the project and population. LBBA has designed supportive housing for a number of different populations in recent years – the formerly homeless, recovering addicts, at-risk LGBTQ youth, blind and visually impaired individuals, and victims of domestic violence. Using principles of Trauma-Informed Design we strive to create spaces that are safe, sensitive, and supportive.

Wolverine Building Group Experience

Wolverine Building Group has eighty-two (82) years of construction experience. Our projects include a wide variety of multi-unit residential buildings including affordable housing, senior living facilities, market rate apartments, historical renovations, and student housing. Included with the attachments is information on a variety of affordable housing and market rate projects similar in scope to the proposed construction at 121 E Catherine.

Wolverine has completed many projects with complex site logistics, using efficient construction methods. Through extensive pre-construction planning, the Wolverine team works to find innovative methods to turn logistical methods into value engineering opportunities. At Harrison Park Apartments in Grand Rapids, the job site was situated in an urban area with heavy foot and vehicle traffic, adjacent to an elementary school. Wolverine used a panelized framing technique. This entailed building individual wood-framed wall panels off-site and transporting the completed panels to the jobsite. This resulted in less construction traffic to and from the jobsite, minimized the carbon footprint and generated less waste. The Residence Inn by Marriott was another Grand Rapids extremely tight urban job site with heavy foot and vehicular traffic. The client had originally planned to use a tower crane for the pre-cast concrete hotel. Wolverine proposed alternate methods for the precast erection that did not require the use of a tower crane. This saved the crane cost and freed up space for construction and material laydown that would have otherwise been used for the crane.

The attachments include information about recent projects of similar size and scale in Michigan. Wolverine constructed Vic Village North, a 135,000 square foot, 12-story mixed use building right next to the University of Michigan Central Campus. The first floor contains commercial retail suites. The second through twelfth floor house eighty (80) student housing units. Wolverine also built Suroeste Brilliante Apartments, a 40,500 square foot building with 24 units in Grand Rapids. This is an affordable housing development and a shared effort among Habitat for Humanity, Dwelling Place, Mercy Health Saint Mary's and Grand Rapids Public Schools. The building includes community gathering space, garage parking with elevator access and plaza greenspace. 205 S. Division is another new construction development by Wolverine in Grand Rapids. It is a 7-story mixed use building, with commercial and residential space and a total of 38 one- and two-bedroom units.

Wolverine has extensive experience with Low Income Housing Tax Credits, HUD funding, and Davis Bacon, Section 3 and EEO requirements. Included in the attachments is a listing of MSHDA-funded developments that Wolverine has completed. This includes 11 developments over the last seven years that were supported by both HUD/MSHDA financing and LIHTC. Recent Wolverine projects have been supported by the following sources: HUD financing; MSHDA financing; LIHTC Funding; Brownfield Incentives; CDBG; and Historic Preservation Tax Credits.

Wolverine employs over a dozen LEED Accredited Professionals and has completed numerous LEED-Certified projects. Wolverine performed the historic renovation of 502-2nd Street, which received LEED Platinum level certification and garnered the highest total points of any project under the former LEED 2.0 rating system. Some of Wolverine's recent projects have been certified with the following: LEED Certification; LEED for Homes, Enterprise Green Communities; and SITES Certification. The attachments include additional information on this.

A.2. DEVELOPMENT TEAM AND CAPACITY

Macon Engineering LLC Experience

Macon Engineering is a local Washtenaw County company and has been providing civil engineering, site planning and construction inspection services for approximately fifteen (15) years. The majority of Macon's projects are located in Washtenaw County and primarily in the City of Ann Arbor. Macon's client base includes Avalon Housing, several various private developers, the University of Michigan, and the City of Ann Arbor. Macon's projects include site planning and preparing construction documents for both commercial and residential developments. The employees of Macon have numerous years of experience in the construction and civil engineering industries.

Included in the attachments are projects of similar size, scale and programs in Michigan. Macon provided site planning and prepared construction documents for a 25-unit residential condominium development on First Street in Ann Arbor. The project included below grade parking and four stories of residential. The project included 250 feet of 12" public water main and a new storm sewer in First Street that required approval from the City of Ann Arbor. Macon also provided civil engineering services for 309 Ashley, which will include nineteen residential units. The development has been planned to provide adequate parking, ingress and egress, stormwater management facilities, pedestrian connections and all other site elements. The project included establishment of a brownfield due to contamination issues.

Macon has worked frequently with projects with similar funding sources as proposed here. Macon provided design and construction services for Avalon's Hickory Way Apartments developments; Pauline Apartments, Hilltop View Apartments and is currently working with Avalon on our The Grove at Veridian. These developments are all Supportive Housing and include Low Income Housing Tax Credit, HOME and Federal Home Loan AHP funding, among other sources.

Elevate Experience

Elevate and our partner, New Ecology, have certified over 40 affordable housing developments with EGC and PHIUS over the past five years; both new construction and rehabs. One current PHIUS project, in Cambridge, is considered to have the tightest building shell on the East Coast. Elevate and New Ecology have extensive experience with LIHTC projects that have either a basic requirement or incentivized system for achieving green certifications. In addition to green certifications, we have acted as energy consultants on over 1,800 LIHTC projects, including at least 10 Permanent Supportive Housing developments. In Michigan, we have recently supported 10 LIHTC projects, and we are partnered with Enterprise Community Partners on the Detroit Preservation Partnership to preserve affordability of 40 at-risk low-income multifamily properties. We have expertise in strategically combining Qualified Allocation Plan requirements with the right green building certification (e.g., LEED, Enterprise Green Communities, PHIUS, Living Building Challenge, etc.) to maximize the chances of a winning tax credit application and make the most cost-effective decision on which certification to pursue.

ArtSpace Experience

Artspace brings extensive experience in both the development and operation of artist housing and of commercial/retail spaces developed along with affordable housing. Artspace is responsible for 58 properties located in 35 cities and 1 tribal reservation across 22 states and Washington DC. This represents 1,928 residential units in operation with another 332 in development. Artspace has created 662 commercial units and has an additional 13,650 square feet of commercial space in development.

Artspace's development experience includes 45 LIHTC developments in 22 states and Washington DC with total development costs of over \$600 million. Artspace successfully led the development of City Hall Artspace Lofts in Dearborn, MI using 9% LIHTC allocated through MSHDA. They are the owner and property manager for this development as well.

Artspace has provided consulting services to over 200 housing projects. These services range from development financing, design and legal structuring, to housing operations, including property management, specialized tenant selection for artist's housing, and the management of associated commercial/retail spaces. Artspace has secured and helped its partners secure housing financing from the public and private sectors--including LIHTC equity, HOME subsidy, and private debt. Artspace has also worked to bring philanthropic funding into both the housing and commercial segments of these developments, including both grants and program-related investments.

Loomis, Ewert, Parsley, Davis & Gotting Experience

Loomis has been recognized for the past three decades as premier counsel providing advice to clients in Michigan, Wisconsin, Illinois, Indiana, Minnesota, Delaware, Pennsylvania, and Maryland regarding various forms of financing for multifamily housing provided through the Michigan State Housing Development Authority (MSHDA), Wisconsin Housing and Economic Development Authority (WHEDA), Illinois Housing Development Authority (IHDA), Delaware State Housing Authority (DSHA), Minnesota Housing Finance Agency (MHFA), Maryland

A.2. DEVELOPMENT TEAM AND CAPACITY

Loomis, Ewert, Parsley, Davis & Gotting Experience Continued

Department of Housing and Community Development (MDHCD), Pennsylvania Housing Finance Agency (PHFA), HUD, Farmers Home, Federal Home Loan Bank and conventional financing sources. The funding has included tax exempt, taxable and pass-through bonds, HOME funds, CDBG funds, AHP loans and other funds. It has worked extensively with subsidized loans under the Sections 8, 221(d)(4), 223(f), 236, 515, 538, 202, and 811 programs including the syndication and resyndication of such developments. It has acted as counsel to borrowers of more than \$2 billion in loan proceeds for affordable and conventional multifamily, congregate and assisted housing developments. It has also acted as counsel to Cinnaire Corporation in its investment in affordable housing throughout the States of Michigan, Indiana, Wisconsin, Illinois, Minnesota, Delaware, Pennsylvania and Maryland as well as for profit and nonprofit developers. It has been involved in the purchase or sale of more than \$300 million in low income housing tax credits. The firm has been active in the structuring of the purchase and sale of federal and state historic tax credits in connection with the rehabilitation of both multifamily housing developments as well as commercial structures. Loomis has also been active in the preservation of affordable housing through 1031 exchanges. Loomis is actively involved in matters of environmental law, including Brownfield development, cleanup and liability determination matters.

As a general matter, Loomis does not release information regarding either their clients or the specific transactions for which they have been engaged unless authorized to do so by their clients. Loomis has worked directly with Avalon over the past few years, serving as Avalon's counsel for Sharon Ann Apartment, Hickory Way Apartments Phases I and II, Hilltop View Apartments as well as with The Grove at Veridian, currently in Avalon's pipeline. These developments have included funding sources such as Low Income Housing Tax Credits, City of Ann Arbor Affordable Housing and Millage funds; Washtenaw County HOME funds, Federal Home Loan Bank AHP funds, as well as conventional construction and permanent loans.

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A.3. DEVELOPMENT PLAN

Plan for Community Engagement

We are planning for active community engagement through our site plan approval and construction process. We will look to exceed the minimum requirements of the City of Ann Arbor's Citizen Participation ordinance for proposed developments. Although this proposal will likely meet the standards to qualify as a Type 2 Project, our team is committed to meeting the requirements for a Type 1 Project.

We will reach out to key neighborhood and community stakeholders, including

- Nearby residents: Both residential neighbors and property owners.
- Nearby commercial/retail businesses: including Kerrytown, Ann Arbor Farmers Market and adjacent businesses.
- Nearby Arts institutions in regard to both the artist housing preference and the ground floor gallery space.
- Neighborhood history: located adjacent to both the Fourth/Ann and Old Fourth Ward Historic Districts; African American Cultural and Historical Museum of Washtenaw County.
- Ann Arbor Downtown Development Authority
- Washtenaw County Continuum of Care for supportive housing priorities
- Small Business/MBE/WBE support and development partners for development of incubator

We plan to hold multiple community meetings (at least two) prior to submission of site plan or construction documents. Development team members who will participate in these meetings would include, at a minimum:

- Avalon Housing: As co-developer and supportive housing services provider.
- Landon Bone Baker: architects, with extensive experience in community engagement
- Elevate: green specialists
- Artspace
- Ann Arbor Housing Commission (invited): co-developer and property manager

We also plan to create an Advisory Group for input and direction to help ensure our design and publicly accessible elements recognize and reflect the history of Black entrepreneurship in this community. From the meetings described above, our development team (Avalon and AAHC) will work to identify members to be part of this Advisory Group. In particular, this group will help guide our installation of public art and any decisions on naming that reflect the neighborhood history. In our description of the ownership structure, we have used a placeholder name for the development as "Catherine Street." We are hoping a name for the development may be generated as part of the community engagement process.

LBBA also brings with them a commitment to and experience with a collaborative design process. Their practice has centered around relationships--cultivating existing partnerships and expanding to embrace more people in the process. Their holistic, tailored approach is informed by three decades of experience in working in community-based work. They have maintained client relationships over time and are still working with many of the same clients and organizations to build health communities and create new, unique partnerships. They can help lead the community engagement process and use their experience with town hall and charrettes, as well as with the co-creation of art installations with residents.

Please also see Section C, Community Development and Tenant Services for additional description of our approach to Community Engagement.



A.3. DEVELOPMENT PLAN

Basic Conceptual Design

Our proposed development is a 6-story, multi-use building that holds down the corner of 4th Ave and Catherine St. in downtown Ann Arbor. The 61,341 square foot proposed building is L-shaped and sited along the streets to maximize efficiency, continue the urban fabric, and to minimize the impact on the neighbors to the north. The first floor is held back to form a shallow colonnade along both streets and holds the more outward-facing functions. These functions include lobby and shared amenities for the residents of the building, a flexible gallery/making space, and an incubator space for aspiring entrepreneurs, with an emphasis on BIPOC-owned enterprises. Per City ordinance the facade stays tight to the walks as it moves up to the third floor, but steps back at the 4th and above. The upper floors (2-6) hold the 68 residential units, as well as dedicated internal gallery space, and a community space and roof deck at the top level facing out towards the City. The units are a mix of two bedroom units, one bedroom units, and efficiencies—the majority of the units will have personal porches and all will have access to the roof deck above.

High Level Development and Construction Cost Estimates

Our projected total development costs for this are estimated at \$20.9 million. Approximately 75% of these costs are hard construction and the related fees.

Hard construction costs for this development are just over \$15.5 million, roughly \$253 per square foot. This includes contractor fees and reimbursables. Construction costs for this site are particularly impacted by a combination of the physical site constraints, funder requirements, design preferences and a commitment to sustainability. The tight development site, on-site stormwater detention and other utility layout and connections all impact our project costs. We will be subject to Davis Bacon wage requirements here, as Avalon has been at our other sites. Our design incorporates a brick exterior for the first three stories, reflecting the surrounding neighborhood. We are also incorporating exterior porches and introducing variety into the exterior building envelope, both to improve the tenant experience and to create a more vibrant building. We have also incorporated tenant gallery space within some of the upper floors. And we have incorporated rooftop outdoor space, and shared community space on the top floor. Our design also includes 6,399 square feet of ground floor space, including providing common amenities for the housing units, whose costs are incorporated in our current projections. The development costs for the gallery and small business incubator space would likely come through a combination of commercial credit, impact investments/ program-related investments and philanthropic donations.

Green Certifications, such as Enterprise Green Communities and Passive House, require a significant amount of planning, documentation, and testing to achieve certification. While this increases non-construction costs, it leads toward better built buildings that have an overall lower cost for operations and maintenance. This includes training contractors on specific requirements and best practices to ensure the building shell and installed systems meet specifications and focus on quality craftsmanship. This will also include highly efficient systems for heating, cooling, and ventilation as well as highly efficient appliances and water fixtures. These items typically have higher upfront costs but lead to much lower utility costs. Additionally, we will maximize the production of renewable energy onsite, including through the installation of rooftop solar, which requires a significant upfront cost but has an overall return on investment that also hedges against long-term price risk of grid-supplied electricity. These increased capital expenditures lead to lower operational expenditures, an overall lower lifecycle cost, and reduced long-term risks from spikes in utility prices. We are providing a carefully designed building shell to minimize air infiltration and to maximize heating and cooling efficiency. We are also planning to include EV parking and chargers. Section D. Design and Performance includes additional information on Green and Sustainable design.

Our total development costs are impacted by legal, environmental, architectural, syndication and other soft costs related to a low income housing tax credit development. In addition the projected costs also include City water and sanitary connection and footing drain disconnect fees, project reserves, developer fee and interim costs related to the construction loan.

Plan for Governmental Planning and Construction / Building Permits

If our proposal is selected, Avalon and LBBA will quickly start our work with City Planning Staff to review our proposal and understand requirements and schedule going forward. With general signoff from Planning staff we will present the development to the Design Review Board and prepare for our Citizen Participation Meetings. We are planning to meet the City's standards for a Type 1 Project, although we may qualify for the more streamlined Type 2 Project standards. After completing our report on the Citizen Meeting, we will schedule our pre-meeting with Planning staff to confirm that our petition materials are ready for e-submission for Development Review Committee (DRC). With DRC signoff we will proceed into the public notice for the City Planning Commission (CPC) meeting. When approved by the CPC, we will go in front of City Council for final approval.

A.3. DEVELOPMENT PLAN

Plan for Governmental Planning and Construction / Building Permits Continued

Parallel to the process above we will be working with Planning Staff to understand what zoning relief may be required and how best to achieve that (Board of Appeals, PUD, etc.). The included design would likely require some relief for Open Space, Building Height, and possibly FAR.

LBBA will also make contact with the Construction and Building Department staff to understand the most efficient process for Plan Submission and Review. We will also establish a relationship with the Code Compliance official to work through code related questions and concerns prior to submission for full review.

Additional information on zoning is included in Section D2.

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A.3. DEVELOPMENT PLAN

Timeline

Our projected timeline for the Catherine Street Development is as follows:

Activity	Date
Securing Planning and Zoning	
City of Ann Arbor RFP submission	December 2021
Interviews	January 2022
Selection/Negotiations	February 2022
AAHC Authorizations	March 2022
Enter into Development Agreement with City	March 2022
Site Due Diligence (Surveys, Environmental, Geotech, Infiltration)	April 2022
Citizen Participation Meetings	June 2022
Site plan submission	July 2022
Site plan review, public hearings & approvals	July 2022–March 2023
Securing key funding sources	
County HOME submission	January 2023
Additional public sources	February 2023
Construction/Perm Loan applications	March 2023
LIHTC submission	April 2023
Federal Home Loan Bank AHP submission	June–August 2023
LIHTC award announcements	July 2023
All funding approved	November 2023
Closing	
Close on Project financing and enter into Ground Lease	December 2023
Construction	
City approval of final plans and specifications	October 2023
Bidding out to subcontractors	November 2023
Construction commencement	December 2023
Construction completion	April 2025
Construction close out	June 2025
Lease-up	
Marketing and lease-up	February–July 2025
Stabilized Occupancy	September 2025

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A.4. PARTNERSHIP STRUCTURE

Roles and Responsibilities

Avalon will undertake the Co-Developer responsibilities as set forth in the RFP including predevelopment and due diligence, hiring the project team, obtaining entitlements and working closely on community processes, developing project budgets and schedules, obtaining financing, providing applicable guarantees, furthering Section 3, MBE and WBE participation and Davis Bacon compliance, construction management oversight and project management through submission of 8609s to MSHDA with assistance from, regular communication and coordination with, and reports to the AAHC. Avalon will also provide on-going supportive housing services throughout the fifteen-year compliance period.

As part of the partnership responsibilities, Avalon proposes taking on guarantees related to Construction Completion and Development Completion, such as related Adjuster, Repurchase, and Payment of Excess Development Costs, and related activities through issuance of 8609s. As AAHC is responsible for property management, we anticipate AAHC will take on guarantees related to lease-up, including related Adjuster, Recapture and Repurchase events and the Operating Deficit Reserve. We understand that AAHC has limits on its guarantees. As a non-profit, Avalon also has limits on our guarantees. Where those limits extend beyond AAHC limits, we are open to taking on those additional applicable obligations. We anticipate that we both take on Environmental Guarantees and payment of Deferred Developer Fees. Guarantees would also need to be negotiated with Syndicator and lenders, as applicable.

Avalon is proposing to have 51% ownership interest in the newly formed general partner. We are proposing the Ann Arbor Housing Commission's newly formed entity have a 49% ownership interest. These percentages are negotiable based on the preference of AAHC. Avalon is proposing to remain part of the Ownership structure throughout the entire 15 year compliance period. This is consistent with our commitment to the proposed population. In addition, it also positions us to achieve the maximum tax credit general partner experience points in a MSHDA LIHTC application. Avalon can be the initial limited partner (or AAHC if preferred), to be replaced by the investor limited partner at tax credit closing. No other entities are anticipated to have a general partner ownership interest in the Catherine Street development.

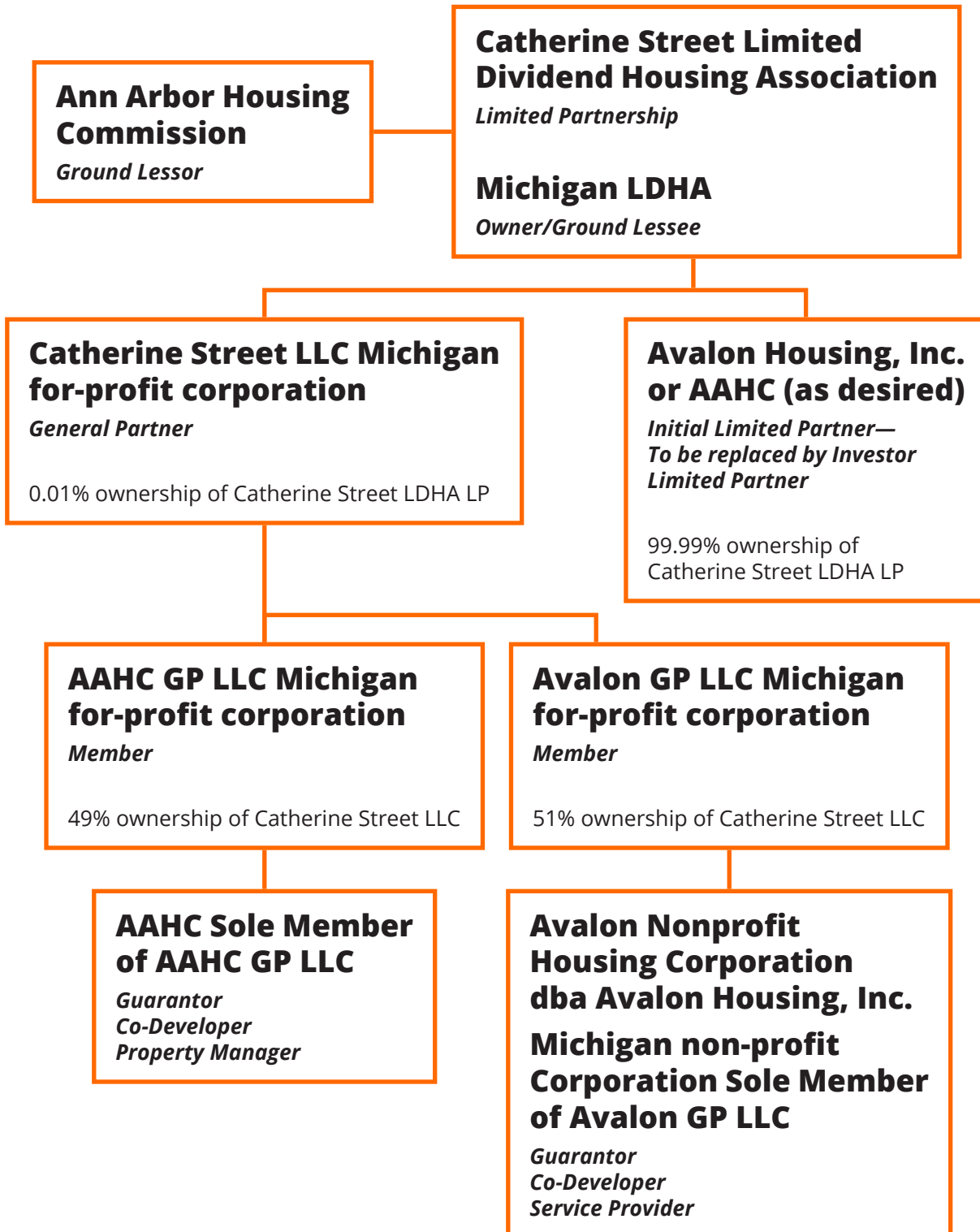
We would propose that the Avalon entity serve as the primary co-managing member through issuance of 8609s and with AAHC being the primary co-managing member after 8609s through the end of the compliance period. We are open to further discussion on this with AAHC.

Following is a chart detailing this proposed structure.

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A.4. PARTNERSHIP STRUCTURE

Catherine Street Proposed Project Ownership Organizational Chart



This Shows Avalon's General Partner interest at 0.0051% with AAHC at 0.0049%
This is negotiable based on the preferences of AAHC

B. FINANCING AND AFFORDABILITY



B. FINANCING AND AFFORDABILITY

Financing Narrative

Our total development costs are projected at \$20.9 million. Financing sources include 9% Low Income Housing Tax Credits. We anticipate supplementing these funds with additional applications for DDA Infrastructure, County HOME funds, City Millage fund, Federal Home Loan Bank AHP, DDA Housing funds, County Brownfield funds and CDBG infrastructure funds (as applicable). We also envision a permanent loan as well as a construction loan. We have used conventional construction and perm loans in our recent new construction deals. We are also interested in exploring whether AAHC Revenue Bond Financing would be a possible option for the Catherine Street Development. Avalon also has experience using MSHDA HOME funds, MSHDA Preservation Loans, MSHDA Taxable Loans, and CDFI loans. We would explore those various sources to see what best fit the needs of the development for our construction and permanent loans, potentially in lieu of or in addition to conventional loans.

Avalon has repeated experience with nearly all of the funding sources we are projecting for Catherine Street. Avalon has developed nine (9) properties (214 units) using Low Income Housing Tax Credits. Avalon has also gone through a successful resyndication of one of our older tax credit properties. Avalon has closed on another tax credit property with 24 units (currently under construction), resulting in a total 11 LIHTC closings. We have an additional three (3) properties, including eighty-four (84) units, in our current LIHTC development pipeline. We have used County HOME Funds at nearly all of our 28 properties. We have closed twenty-seven (27) of our deals using FHLB AHP funds. We have been awarded City Millage funds for two of our developments—Hickory Way Apartments Phase II, and The Grove at Veridian. We have used Downtown Development Authority Housing funds at all eight of our properties that qualify based on their location. We have recently been awarded County Brownfield funding through both the Brownfield Assessment Fund and the Local Brownfield Revolving Fund.

We expect that the 9% LIHTC funding will be most challenging given the high level of competition for these funds. We plan to submit this application under the supportive housing category—the category we have used for our tax credit applications since the category was created. We anticipate scoring well, with our walkable location, high levels of green commitment, deeply targeted supportive housing and experienced team.

Given our experience with the additional sources, we feel this development would be very strongly positioned to be awarded those funding sources, pending funding amounts and availability. We have projected a combination of CDBG Demo and Infrastructure funding and Local Brownfield Assessment Funds in this early conceptualization of funding sources. We will need additional environmental studies to determine if those Brownfield funds would be applicable to our development. Given the downtown location, and findings at other downtown sites, we think there is a very reasonable possibility that this site may be eligible for that funding. We have been very successful in seeking FHLB AHP funds. We feel this development would also score well. We would evaluate the various Federal Home Loan Banks for our application, which impacts competitiveness and funding levels.

If project costs, or access to soft dollars, are such that other funding sources are needed, we would explore a combination 4%/9% deal. For this we would likely form two separate condos. Avalon is primarily experienced in 9% tax credits, although Avalon staff also have experience implementing 4% development. Our current legal team is experienced with 4%/9% combination deals. We would also look at syndicator experience with these combination deals.

Project uses include construction costs, construction loan and interim costs, other soft costs, developer fees, syndication costs and reserves

Our initial sizing of the permanent loan was developed alongside an operating proforma with our operating income and expenses, maintaining a debt service of 1.15 or above. We can also provide a rough operating proforma upon request. We have incorporated rent structure and PILOT information as detailed below into our operating proforma. We recognize that the Ann Arbor Housing Commission will be the property manager, so we anticipate working very closely with them in order to further refine and further develop the operating proforma.

The financing related to the ground floor space is called out further in the Design Narrative in Section D. The development costs for the residential ground floor spaces would be fully incorporated into the core housing development proforma and would be in basis for any LIHTC projections. The development costs for the gallery and small business incubator space would likely come through a combination of commercial credit, impact investments/ program-related investments and philanthropic donations. Operating costs for the active ground floor space would not be part of the housing development operations, but would likely be either part of a separate condominium arrangement or a master lease. We would like to discuss these alternatives with AAHC to learn their preference and comfort.

B. FINANCING AND AFFORDABILITY

Financing Narrative

Below is a preliminary estimate of development uses and potential funding sources. This is presented to give a sense of a potential structuring of the funding across a range of sources. We would anticipate many adjustments and refinements to this as the project progresses.

Catherine Street

Uses of Funds

Acquisition	\$1
Construction	\$15,520,843
Construction Contingency, Water & Utility Connections	\$1,161,967
Construction Financing, Interim Costs	\$915,000
Other Soft Costs	\$1,429,160
Developer Fees	\$1,500,000
Reserves	\$354,417
Total Uses	\$20,881,388

Sources of Funds

LP Equity (LIHTC)	\$13,348,665
City Millage Funds	\$1,200,000
Perm Loan	\$3,250,000
Washtenaw Urban County	\$850,000
FHLB	\$900,000
DDA Infrastructure funds*	\$150,000
DDA Housing funding	\$500,000
Brownfield/CDBG Infrastructure Funds	\$500,000
GP capital	\$100
Deferred developer fee	\$182,623
Total Sources	\$20,881,388

*The vast majority of the DDA infrastructure funds are not shown on this housing proforma as they are primarily projected for upgrading underground infrastructure outside of the LIHTC budget. Some funding is shown here for qualifying improvements (sidewalks, streetlights, etc.)

We have included below preliminary construction costs from Wolverine construction. These are early estimates to be refined as the project goes forward

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B. FINANCING AND AFFORDABILITY



Preliminary Budget

Catherine RFP Site
Ann Arbor, MI
December 1, 2021

Gross Sqft 61,341

Division No.	Description	Cost	Cost PSF
DIV 2	Site Work / Excavation	\$ 625,000	\$ 10.19
DIV 3	Concrete	\$ 393,160	\$ 6.41
DIV 4	Masonry	\$ 815,624	\$ 13.30
DIV 5	Metals	\$ 515,475	\$ 8.40
DIV 6	Carpentry	\$ 1,990,460	\$ 32.45
DIV 7	Thermal & Moisture Protection	\$ 1,104,723	\$ 18.01
DIV 8	Doors & Windows	\$ 1,288,625	\$ 21.01
DIV 9	Finishes	\$ 1,222,364	\$ 19.93
DIV 10	Specialties	\$ 231,840	\$ 3.78
DIV 11	Equipment	\$ 39,500	\$ 0.64
DIV 12	Furnishings	\$ -	\$ -
DIV 13	Special Construction	\$ -	\$ -
DIV 14	Conveying Systems	\$ 450,000	\$ 7.34
DIV 15	Mechanical	\$ 3,005,709	\$ 49.00
DIV 16	Electrical & Low Voltage	\$ 933,774	\$ 15.22

TOTAL HARD COST	\$ 12,616,254	\$ 205.67
Reimbursables 2.2%	\$ 281,500	\$ 4.59
Contingency 5.0%	\$ 644,888	\$ 10.51
General Conditions 6.0%	\$ 812,559	\$ 13.25
Overhead 2.0%	\$ 287,104	\$ 4.68
Profit 6.0%	\$ 878,538	\$ 14.32
ESTIMATE TOTAL	\$ 15,520,843	\$ 253.03



B. FINANCING AND AFFORDABILITY

Historic Financing Letters of Interest/Award Letters

In the attachments we have included financing letters we received for other Avalon developments. These are sources that we used before and that we anticipate using or are exploring using at Catherine Street.

We have used most of the sources below multiple times in the past. We have only included one letter for each funding source in the attachments by way of example.

- Low Income Housing Tax Credit Reservation--Award of Credits from MSHDA
- Low Income Housing Tax Credit Equity--Commitment Letter from Equity Investor
- Washtenaw County HOME Award Letter
- MSHDA HOME Award
- City Millage Award
- Downtown Development Authority (DDA) Housing Funding
- Washtenaw County Brownfield Environmental Assessment Funding
- Washtenaw County Local Brownfield Revolving Grant Fund (LBRF)
- Community Development Block Grant funding
- Conventional Construction Loan
- Conventional Construction and Permanent Loan
- Federal Home Loan Bank Affordable Housing Program funds
- MSHDA Permanent Loans
- CDFI Permanent Loan

Rent and AMIs

All units will be restricted to households at or below 60% of Area Median Income. In addition, half of the units will be further committed as supportive housing units, with incomes at or below 30% of Area Median Income. These units will be aligned with the Continuum of Care's housing and service priorities. Avalon will prioritize those in the community most in need of supportive housing—typically, those who are defined as chronically homeless and highest acuity. Those commitments would also be made as part of our Low Income Housing Tax Credit applications, so MSHDA would also incorporate their level of oversight. In addition, other funding sources could also incorporate these supportive housing commitments to varying degrees (not all funders recognize or score the same distinctions).

Utilities for all units will be paid for by the Owner. There will not be additional fees to residents. Laundry would likely be coin-operated. If awarded, Avalon would seek project-based vouchers for the 34 supportive housing units, potentially through another AAHC RFP, enabling these households to pay only 30% of their income in rent, thus making them affordable to extremely low income households. Since vouchers are not yet awarded, we are projecting the rents for these units at the low-HOME level rents: \$932 for efficiencies; \$998 for one-bedrooms; and \$1198 for two-bedrooms

The rents for 34 units without vouchers are restricted to households at or below 60% Area Median Income. These units are proposed to have a preference for artists whose income qualifies. This responds to the significant numbers of the artistic community whose primary income comes through hourly work, such as at restaurants, retail, hospitality, or other areas. The rents are currently set at 50% of AMI, allowing for a range of households to be able to afford the rent on these units. While we set the income eligibility at 60% of AMI, we recognize not all households move in with incomes at that top level. Setting the rent level at 50% provides an additional band of affordability.

As we prepare our various funding applications (including HOME and FHLB AHP) we would ensure our commitments were consistent across applications, or where they vary based on funder requirements, we would track the individual requirements and summarize the strictest, as we do with the layered funding at our other sites.

Tax Exemption Programs

As with Avalon's other affordable housing developments, we would seek a Payment in Lieu of Taxes (PILOT) for this development. Our proposal for Catherine street meets the City's qualification criteria based on our proposed funding and tenant income restrictions. While it would qualify for an automatic PILOT based on the broad City ordinance, we would also seek a development-specific ordinance, in keeping with tax credit scoring requirements.

B. FINANCING AND AFFORDABILITY

Ensuring Extended and Permanent Affordability

At Avalon, housing is a basic human right. Our mission is to build healthy, safe and inclusive supportive housing communities as a long-term solution to homelessness. This is reflected in our commitment to long-term and permanent affordability, both at our existing properties and at the Catherine site. Through the tax credit application process, we would commit to the 45 year extended use period for the Catherine site. With County HOME funds, we regularly commit to a 30-year affordability period. And our City Millage commitments have included 99 year affordability commitments. We would echo that 99 year commitment here at Catherine Street and feel it is solid public policy to ensure these units remain affordable well into the future.

Funding that includes a longer affordability period, often has a more limited period (frequently 15-20 years) after which sources can be sought again in order to re-invest in the properties while maintaining the long term affordability. Avalon has had two low income housing tax credit developments that reached the end of the tax credit compliance period. We re-invested in both properties, one through a tax credit resyndication. We have also undertaken a systematic reinvestment in our existing scattered site supportive housing stock, providing important energy efficient updates and ensuring longevity. During the 15-20 years operating budget term, we set aside replacement reserve funding each year. That would be done at Catherine Street and is structured to be able to fund future capital needs that would arise during the course of the development.

Ground Lease

For this ground lease, we anticipate that either the City of Ann Arbor maintains ownership of the land, or they transfer it to AAHC. We would then anticipate the AAHC ground leasing the Catherine Street property to the project partnership for a term of approximately sixty (60) years. After year fifteen, as the investor leaves the partnership, the lease could be collapsed and AAHC could return as the unencumbered owner of the property. Avalon currently has one ground lease with the City of Ann Arbor. We understand that the Ann Arbor Housing Commission has additional experience with ground leases. We are interested in hearing from AAHC if there are additional considerations or structures they would be interested in proposing for a ground lease.

As we are committing to deeply target supported housing, for at least half of the units that we are proposing at this site, we are requesting the ground lease in the nominal amount of \$1 at time of ground lease closing and \$1 per year. AAHC, the City and Avalon all share a common mission of providing housing to those most in need and using the Catherine Street property for this purpose is in keeping with that mission.

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C. COMMUNITY DEVELOPMENT & TENANT SERVICES



C.1. COMMUNITY SPACE

This development proposal includes community space that will contribute to the building of community both among residents and in the broader neighborhood. The design relies on the use of common space to strengthen both the experience of residents and the development's contributions to the neighborhood.

Resident-oriented spaces: The relationship between residents and the communal space on-site has a profound effect on well being. Therefore, we are prioritizing community space in a way that takes into account the needs of residents, as driven by our vast experience with building community within supportive housing settings. This experience has taught us that in addition to the meaning and value residents gain from the location and social relations they have with the local community, they also value having social support and activities of social inclusion explicitly linked to where they are housed.

The ground floor includes 2,472 sf of space that opens onto the corner of Fourth and Catherine. This includes the main entrance to the residential units above, property management office and common spaces that serve the residents. As part of the supportive housing design, and consistent with MSHDA requirements, this space will include a common meeting room of at least 1,000 sf and two offices of at least 100 sf each. Supportive housing includes a rich array of services described in this proposal some of which are delivered in tenant's actual apartments, but some of which are best delivered in private offices; other services are more communal in nature, either because they are specifically about community building or because they can be effectively offered to a group of people.

The Catherine St. development will have an on-site community center that will provide an array of tenant programming, as well as access to vital resources. The community center will include a community kitchen. Programming out of the community center will be structured to respond to tenant needs, and will include computer and internet access and assistance, a weekly food pantry, employment and educational assistance, self-help groups, peer support and community building.

Artspace's model also includes community space to further artistic work by residents. The specific amenities chosen will be decided in collaboration with the local Artspace feasibility study, but in other communities this can include studio space, rooms with commercial drains, areas for specific artistic efforts like pottery, etc. This space is financed as part of the overall housing sources and uses, and would be in basis for any LIHTC projections.

Public-facing spaces: As currently proposed, there are two spaces that would be oriented towards commercial or retail activity, both are along Fourth Ave. and total 2,068 sf. Avalon is proposing to use these spaces to contribute to the retail vibrancy of the neighborhood, and in ways that further the goals of the RFP. In particular, there are two possible uses that have been identified and preliminary conversations have begun (see Community Engagement):

One anticipated use would be an art gallery, reflecting the artist's housing in the development, but also adding to a neighborhood that already has a number of key art institutions, including the Michigan Guild of Artists & Artisans/Gutman Gallery, the WSG Gallery and the Kerrytown Concert House.

A second anticipated use is a small business incubator. This not only creates unique and attractive retail activity, but it turns the RFP's request to reflect and honor the neighborhood's history as a center of African American entrepreneurship into an activity that promotes that same sector going forward. It is worth noting that an alternative design provided additional retail/commercial space along Catherine, but at the expense of the parking spaces behind that wall; we are open to discussions with the City/AAHC about this choice. Preliminary discussions with organizations already working in support of small business development suggest that financing for this space would be a combination of commercial credit, impact investments/program-related investments and philanthropic donations.

Public Art: The current design anticipates the availability of wall space along Catherine St. for a mural or other public art. This could certainly be an additional way to honor and reflect the neighborhood's history and also collaborate with the arts community who will be part of the artist's housing development above.

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C.2. TENANT SERVICES

Tenant Services

When complete, Catherine St. will include sixty-eight (68) new units of affordable housing. In total, there will be fifteen (15) efficiencies, forty-eight (48) one-bedroom units, and five (5) two-bedroom units.

For the thirty-four (34) units targeted as supportive housing units, we will focus on screening in the Continuum of Care's priority population, in line with our community's identified priority areas for services and housing. Avalon will prioritize those in the community most in need of supportive housing—typically, those who are defined as chronically homeless and highest acuity.

For the thirty-four (34) units targeted as affordable housing for artists, we will utilize the model developed by Artspace and in use in over 50 developments across the country. Anyone who qualifies for affordable housing may apply for residency in an Artspace project, but we give preference to those applicants who participate in and are committed to the arts. The term artist is broadly defined to include a wide range of creative pursuits, including traditional art forms—a resident need not make their living from their art, but we look for evidence that applicants are seriously committed to their art and that they will be mindful and positive contributors to the building and community.

As in all existing Avalon developments, services will be available to all residents. Neither the layout of spaces nor the design of services and activities would differentiate between residents moving in based on the arts or the supportive housing preferences. Rather, we anticipate overlap and interactions between these residents, and that many services and amenities will serve everyone.

Supportive Housing Services

Avalon is serving as the lead service provider, using the Housing First model, for this development. Avalon currently provides supportive housing services to nearly 800 people across Washtenaw County. Avalon has served in a leadership capacity on supportive housing issues locally and statewide. Avalon is active in the local Continuum of Care, and currently has multiple grants funded through HUD's Hearth Act programs.

As the primary service provider, Avalon will be on site 40 hours per week, in addition to being on call 24/7/365 for acute crises. Avalon will provide housing-based case management for tenants. Services are voluntary, flexible, client-led, and ongoing. Service interventions begin with assertive engagement outreach, and assistance with basic needs as we work to develop trust and supportive relationships. All supportive housing clients are assigned a case manager, who will complete comprehensive assessments and help residents identify goals and action plans with top priority on addressing behaviors that threaten tenancy.

Avalon will provide crisis response, advocacy, care coordination, transportation and more, working with residents in all areas of their lives to achieve health and stability for the entire household. This may include recovery support, safety planning, education, employment or other goals. Service intensity is based on need, and typically decreases over time as residents build informal support networks. High needs individuals may receive multiple contacts a week in order to manage (or avoid) a crisis, and Avalon will maintain close relationships with these households, able to respond as needed. Avalon services also place a high value on community building, and case managers encourage social connection and participation in community center activities.

Once individuals have been identified, Avalon staff will work to engage them and facilitate their move-in process where they are then assigned a case manager. Avalon maintains strong working relationships with various local providers, health systems, shelters, and other local resources. As such, Avalon has an excellent track record of engaging and transitioning our population successfully into housing.

Within 30 days of move in, services staff will complete a comprehensive assessment with each household, and link them to needed supports such as family and legal advocacy, employment, and education. We will also coordinate care to address physical and behavioral health needs, linking clients to primary care providers and assisting with navigation of mental health and substance abuse treatment systems. Avalon services are on call 24/7 and can provide crisis intervention as needed. Support services for tenants are not time limited and will vary in frequency and intensity as needed. The team is trained on and will utilize evidence based practices such as motivational interviewing, assertive outreach, trauma informed care, housing first, and harm reduction.

Avalon will ensure its support services teams will work closely to coordinate eviction prevention plans and identify accommodations that will help tenants achieve success. Regular meetings will be held to identify tenants who are at-risk and in need of a service intervention, with daily contact between services and property management should any issues arise.

C.2. TENANT SERVICES

Supportive Housing Services Continued

Avalon leverages multiple community partnerships to successfully support our residents, including but not limited to the following:

Washtenaw County Community Mental Health (WCCMH) will provide case management, behavioral health services, crisis response, and psychiatric care for tenants with serious and persistent mental illness. They provide mental health services to adults with a severe and persistent mental illness, children with a severe emotional disturbance, and individuals with a developmental disability. We maintain a strong working relationship with WCCMH and are one of their contracted providers. This partnership allows for a high level of coordination and mutual ownership of cases. This includes regular meetings of the client, treatment team and prescribers, and enables both parties to be part of the Individual Plan of Service (IPOS) planning. Both agencies also participate in crisis intervention and development of crisis/safety plans with the WCCMH crisis team as lead.

On-Site Substance Use Services will be provided by Avalon who is a licensed SUD treatment provider with the Community Mental Health Partnership of Southeast Michigan, in coordination with our other local substance use treatment providers where appropriate. Many Avalon Case Managers and Supervisors are Certified Recovery Coaches. We also have Case Managers who are Certified Alcohol and Drug Counselors who provide assessment, recovery planning, relapse prevention planning, and referral and linkage to inpatient or intensive outpatient substance use treatment. Our staff will be available for consulting, problem solving and assistance in creating safety plans for tenants that are struggling with substance use, as needed. We also have Peer Support Specialists who are Certified Recovery Coaches providing onsite support. Peer supports include but are not limited to wellness, recovery, and action planning (WRAP), accompaniment to 12 step or other mutual aid group meetings, and linkage to harm reduction supplies. We will offer peer support services, direct syringe access and safer smoking kits onsite, in addition to Narcan distribution. Avalon will actively engage with residents in safety planning and reducing the negative impacts of substance use. Avalon Peer Support Specialists will also host onsite mutual aid and 12 step recovery groups onsite.

Physical and Behavioral Health Services will be provided by Packard Health, our local Federally Qualified Health Center. Packard Health provides comprehensive primary care and integrated services to our population through their Patient Centered Medical Home model. In addition, Avalon contracts with Packard Health for a primary care physician who does home visits with clients unlikely or unwilling to engage with primary care in a clinic setting. With the provision of primary care and subsequent healthcare coordination/follow up from a medical professional, we have found this “backpack medicine” model to substantially reduce inappropriate Emergency Department utilization. Packard Health also provides mental health evaluation and referral, brief solution focused therapy, psychiatry consultation, depression screening, substance abuse assessment and referral, and treatment of co-occurring disorders. Access to these services are facilitated by the primary care provider offering on-site care. Packard also provides case consultation to Avalon’s case management teams and coordination of care related to the health needs of Avalon tenants.

In addition to our partnerships with WCCMH and Packard Health, Avalon works closely with both major health systems (St. Joseph Mercy Health System and University of Michigan Complex Care Management Program). Both health systems have staff dedicated to coordinating with us around the inpatient health needs of our clients if they’re admitted, as well as outpatient care coordination needs. We routinely participate in multi-disciplinary case consultation regarding complex cases to improve case outcomes. With this model, Avalon has built the evidence base for using supportive housing to stabilize health and prevent future emergency room visits and hospitalizations.

Other partnerships include but are not limited to employment supports offered by Michigan Works, financial literacy and counseling provided by Old National Bank, legal advocacy and support from Legal Services of South Central Michigan, criminal/legal prevention and advocacy with the Washtenaw County Prosecutor’s office, and various courts throughout the County, as well as with Washtenaw County Sheriff’s Office Jail Reentry Services team.

We have a proven commitment to serving this population, and developed partnerships throughout the community supporting us in this aim.

C.2. TENANT SERVICES

Supportive Housing Community Space

The relationship between residents and the communal space on-site has a profound effect on well being. Therefore, we are prioritizing community space in a way that takes into account the needs of residents, as driven by our vast experience with building community within supportive housing settings. This experience has taught us that in addition to the meaning and value residents gain from the location and social relations they have with the local community, they also value having social support and activities of social inclusion explicitly linked to where they are housed.

The Catherine St. development will have an on-site community center that will provide an array of tenant programming, as well as access to vital resources. The community center will include a community kitchen. Programming out of the community center will be structured to respond to tenant needs, and will include computer and internet access and assistance, a weekly food pantry, employment and educational assistance, self-help groups, peer support and community building.

In addition, there will be staff offices which will offer private meeting space for supportive services.

Other amenities for residents are anticipated to include coin operated laundry rooms, a health and wellness space, as well as a rooftop outdoor patio space for exercise and group activities.

Arts Amenities/ Services and Community Space

The building will also offer resources that promote the arts and cultural productions by residents. The ground floor common area will be designed to be adaptable to a range of artistic uses. These may include music, dance or spoken word performances and/or rehearsals, art exhibitions, and other events that promote the artistic creations of residents and invite the broader local arts community into the unique community of artists living in the building.

The specific prioritization of artistic amenities will be determined through the local community engagement process, but these could include: rooms designed with specialized drains to accommodate painting or other activities; studios for rehearsing or recording music; pottery facilities; etc.

Broad interior corridors on some of the upper residential floors serve as informal galleries; a more public gallery on the ground floor is designed to house formal exhibitions. Social activities around the arts can include receptions, exhibits and performances that help the community of artists support each other through networking and collaboration.



C.3. COMMUNITY ENGAGEMENT

Community Engagement

The community engagement plan for this development reflects the various components. Special attention is given to engaging with the nearby residential and commercial neighbors, those affected by the proposed uses and, reflecting the RFP, how this development reflects and honors the neighborhood's history.

As described elsewhere and following Ann Arbor's Community Engagement requirements, the development team will reach out to the surrounding neighborhood and broader community—both residential and commercial neighbors—to gain information on preferred development options. This will include open community meetings that are structured to share our preliminary plans, encourage reactions and gather proposals that can enhance or alter the design and use proposals. The development team will reach out to the strong network of engaged local residents, including the North Central Neighborhood Association, as well as the nearby Old Fourth Ward Association and the Kerrytown area more generally, as well as nearby retail and commercial stakeholders.

Historic neighborhood: Avalon is committed to the RFP's expectations that this development reflects and honors the history of African American entrepreneurs in the neighborhood. This commitment is already visible in the proposed small business incubator on the ground floor (see below)—allowing small businesses, including MBE/WBE enterprises, to benefit from the excellent retail location between Kerrytown and downtown, along the Fourth Avenue corridor. Avalon has previously included art installations by local artists in our Carrot Way and Hickory Way developments and we anticipate doing the same here—this time aiming to reflect the history of African American entrepreneurship in the neighborhood as well as the arts focus of the housing.

Supportive and Affordable Housing: Avalon is already deeply involved in the local Continuum of Care and has ongoing contact with the Washtenaw Urban County and the City's Housing and Human Services Advisory Board—these being some of the key bodies that help local City and County government prioritize housing needs. Avalon will continue to use these boards, and their planning documents, as it develops the housing and services priorities for this development. Ann Arbor also has a strong infrastructure of people and organizations that support affordable and supportive housing who will also be included in our community outreach efforts.

Artist Housing: Avalon is particularly excited to be entering a new partnership with Artspace and the local arts community. Artspace is already involved in a local feasibility study being coordinated by Synecdoche Design together with the Song Foundation. This study is focused on the priorities and stakeholders within the arts community and the timing of this feasibility study aligns well with the AAHC's RFP as it fleshes out leadership, priorities and potential within the arts community.

Ground floor activation: Activation of ground floor space to enhance the walkability of the neighborhood is incorporated into this proposal. As indicated in the RFP, these amenities should complement the existing commercial/retail uses without creating undue competition. Avalon's proposal for the ground floor space reflects specific elements of our broader proposal and requirements of the RFP. Some combination of these uses is being considered for the ground floor

- **Gallery space:** Reflecting the artists' housing above, Avalon is eager to create gallery space that is open to the public to both highlight, and provide a commercial outlet for, artistic productions. Avalon has already reached out to two nearby institutions—the Guild of Artists and Artisans/Gutman Gallery with a location on 4th Avenue and The WSG Gallery with a location on Ann St.—to confirm the desirability of additional gallery space in the area and to discuss possible collaborations.
- **Small business/MBE/WBE incubator:** Avalon is also interested in using the retail space to honor the neighborhood's history of African American entrepreneurship by supporting the continued development of small businesses from African American and other communities. We believe that helping this sector grow into the future is the best way to honor this history. To that end, Avalon has already reached out to key support institutions for small business development—the Entrepreneurship Center at Washtenaw Community College; Lake Trust Credit Union, a CDFI that has supported similar incubators in Lansing and Brighton; and the Greater Washtenaw Region of the Michigan Small Business Development Center (SBDC). Avalon has also explored the interest of local philanthropic organizations to support a small business incubator space, including an initial conversation with Sean Duval, a local entrepreneur with leadership roles at both Washtenaw Community College and the Ann Arbor Area Community Foundation.

C.3. COMMUNITY ENGAGEMENT

Community Engagement

Public Art/Design Element: As mentioned in Section A3, we also plan to create an Advisory Group for input and direction to help ensure our design and publicly accessible elements recognize and reflect the history of Black entrepreneurship in this community. This group will help guide our installation of public art and any decisions on naming that reflect the neighborhood history. In our description of the ownership structure, we have used a placeholder name for the development as "Catherine Street." We are hoping a name for the development may be generated as part of the community engagement process.

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D. DESIGN AND PERFORMANCE



D.1. DESIGN NARRATIVE

Design Narrative

Our proposal for 121 E. Catherine is designed to be a harmonious and beautiful addition to the existing Ann Arbor community, while also being a forward-thinking model for design, community engagement, affordability, arts-driven development, and sustainability.

We are proposing a 61,341 square foot L-shaped building that is designed to maintain the urban fabric along the sidewalks, while minimizing impact on neighbors to the north. The first floor stays tight to the walks as it moves up to the third floor, but steps back at the fourth floor and above. The 68 residential units include 15 efficiencies, 48 one- and 5 two-bedroom apartments. There is tenant community space and a usable roof deck at the top level. This development includes significant green infrastructure, including all electric, rooftop solar, and a building shell that minimizes air infiltration and maximizes heating and cooling efficiency. We provide 24 units of public parking, including electric vehicle charging stations, a pedestrian pathway through our site to the Farmers Market and nearby amenities, and EV carshare for residents.

Our project team is skilled across all of these elements. Avalon has been developing supportive housing in Ann Arbor since 1992, and now has 28 properties with 364 units. Three of our properties have full Enterprise Green Communities (EGC) certification, with two more currently pending. We are partnering with Landon Bone Baker Architects (LBBA), a full-service architectural firm that has designed over 5000 units of affordable and supportive housing, along with associated social spaces for programs and services, including similar scale urban developments. LBBA is also experienced in green and passive housing design techniques, designing the first multi-family building in the City of Chicago certified as Passive House Institute US+ (PHIUS+). LBBA's consultant team will include Strategic Energy Solutions, Inc. for MEP engineering and IMEG for Structural Engineering. Both of these Michigan-based firms have extensive experience in residential, sustainable development. Our General Contractor, Wolverine Building Group, has projects that include affordable, downtown sites with complex site logistics and efficient construction methods. Wolverine has experience with green building projects, including LEED, EGC, and Living Building Challenge. Macon Engineering, our civil engineer, has extensive experience working in the City of Ann Arbor, particularly on tight downtown sites such as Catherine. Elevate, our green consultant, and their partner New Ecology, have certified over 40 affordable housing developments, including EGC and PHIUS for both new construction and rehab. They have extensive experience as energy consultants, working on over 1,800 LIHTC properties in the past 5 years. 10 of Elevate's projects were Permanent Supportive Housing. Artspace will serve as our consultant for the artist housing and gallery space. Artspace's experience includes 45 LIHTC developments in 22 states and Washington DC, focused on artist housing and programming. Loomis, our attorney, has been recognized for the past three decades as premier counsel, providing advice in Michigan and other states regarding various forms of financing including through MSHDA, HUD, FHLB, and conventional sources, among others.

The team described above is well-equipped to design and build a Net Zero ready development. Our proposed development will meet a minimum of 2020 Enterprise Green Communities Plus Certification and reach for Passive House US Certification. Our vision is a beautiful, sustainable building that maximizes energy efficiency, water efficiency, and renewable energy while minimizing its environmental impact on surrounding infrastructure. We will do our best to maximize the amount of electricity that is generated on site with rooftop and south facing window shade photovoltaic panels. The building will also include highly efficient systems for heating, cooling, and ventilation as well as highly efficient appliances and water fixtures.

The proposed ground floor uses can generally be grouped into two parts--space that primarily serves the residents of the building and space that faces outward, serving the general public.

Resident-oriented spaces: The ground floor includes 2,472 sf of space that opens onto the corner of Fourth and Catherine. This includes the main entrance to the residential units above, property management office and common spaces that serve the residents. As part of the supportive housing design, and consistent with MSHDA requirements, this space will include a common meeting room of at least 1,000 sf and two offices of at least 100 sf each. Supportive housing includes a rich array of services described in this proposal some of which are delivered in tenant's actual apartments, but some of which are best delivered in private offices; other services are more communal in nature, either because they are specifically about community building or because they can be effectively offered to a group of people. Artspace's model also includes community space to further artistic work by residents. The specific amenities chosen will be decided in collaboration with the local Artspace feasibility study, but in other communities this can include studio space, rooms with commercial drains, areas for specific artistic efforts like pottery, etc. This space is financed as part of the overall housing sources and uses, and would be in basis for any LIHTC projections.

D.1. DESIGN NARRATIVE

Design Narrative Continued

Public-facing spaces: As currently proposed, there are two spaces that would be oriented towards commercial or retail activity, both are along Fourth Ave. and total 2,068 sf. Avalon is proposing to use these spaces to contribute to the retail vibrancy of the neighborhood, and in ways that further the goals of the RFP. In particular, there are two possible uses that have been identified and preliminary conversations have begun (see C.3. Community Engagement). One anticipated use would be an art gallery, reflecting the artist's housing in the development, but also adding to a neighborhood that already has a number of key art institutions, including the Michigan Guild of Artists & Artisans/Gutman Gallery, the WSG Gallery and the Kerrytown Concert House. A second anticipated use is a small business incubator. This not only creates unique and attractive retail activity, but it turns the RFP's request to reflect and honor the neighborhood's history as a center of African American entrepreneurship into an activity that promotes that same sector going forward. It is worth noting that an alternative design provided additional retail/commercial space along Catherine, but at the expense of the parking spaces behind that wall; we are open to discussions with the City/AAHC about this choice. Preliminary discussions with organizations already working in support of small business development suggest that financing for this space would be a combination of commercial credit, impact investments/program-related investments and philanthropic donations.

Public Art: The current design anticipates the availability of wall space along Catherine St. for a mural or other public art. This could certainly be an additional way to honor and reflect the neighborhood's history and also collaborate with the arts community who will be part of the artist's housing development above.

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D.1. DESIGN NARRATIVE



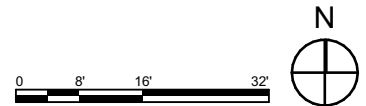
D.1. DESIGN NARRATIVE



Ground Floor Plan Conceptual Drawings

Building Summary

Total GSF: 61,341
 Total Units: 68
 (5) 2-BR
 (48) 1-BR
 (15) Efficiencies
 Ground Floor GSF: 6,399



D.1. DESIGN NARRATIVE



2nd Floor Plan
Conceptual Drawings

2nd Floor GSF: 11,851
 Total Units: 14
 (1) 2-BR
 (9) 1-BR
 (4) Efficiencies



D.1. DESIGN NARRATIVE



3rd Floor Plan
Conceptual Drawings

3rd Floor GSF: 11,851
 Total Units: 14
 (2) 2-BR
 (9) 1-BR
 (3) Efficiencies

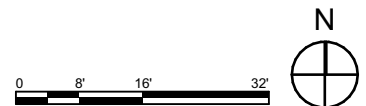


D.1. DESIGN NARRATIVE



4th Floor Plan
Conceptual Drawings

4th Floor GSF: 10,688
 Total Units: 14
 (1) 2-BR
 (10) 1-BR
 (3) Efficiencies

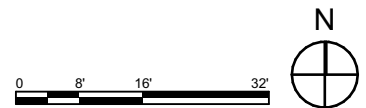


D.1. DESIGN NARRATIVE



5th Floor Plan
Conceptual Drawings

5th Floor GSF: 10,688
 Total Units: 14
 (1) 2-BR
 (10) 1-BR
 (3) Efficiencies

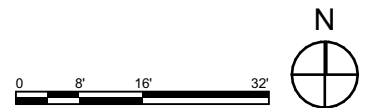


D.1. DESIGN NARRATIVE



6th Floor Plan
Conceptual Drawings

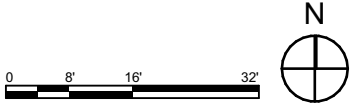
6th Floor GSF: 9,864
Total Units: 12
(10) 1-BR
(2) Efficiencies



D.1. DESIGN NARRATIVE



Roof Plan
Conceptual Drawings



D.2. ZONING STRATEGY

Zoning

The proposed 6-story development will comply with the governing Building Codes. We are proposing a 2-story, Type I construction (non-combustible) podium, with wood frame Type V construction above. We do not see any need for any specific review or variance for Building Code.

The preliminary zoning analysis for the development (see attached Zoning Matrix) does reveal a need for zoning relief for three items. Per the Development Plan we will work through the described City process to address the relief needed. The first item requiring relief is Open Space. The requirement to continue the urban wall along Catherine and 4th Streets along with a desire to maintain as much parking for the public as possible has left the development without usable open space at grade. The development does include both private and shared exterior and interior spaces throughout the building for the residents, but these do not offset the zoning requirement. The second item that will require relief is our proposed Building Height of 65'. At 6-stories, with a commercial/public first floor function staying below the 60' zoning requirement is not possible. The third zoning item that will need review is the parking count. The RFP notes that no on-site parking is required, but our preliminary zoning study revealed an excess of the 24 provided. We will want to review the requirement with City Planning staff to confirm the requirement between the tenants, public functions within our development, as well as the desire to offset some of the lost City public parking.

During this abbreviated design process for the RFP response our development team quickly reviewed a number of designs with varied heights (5 stories vs. 6 stories), massing (U-shaped vs. L-shaped), and density of program (higher unit counts, constructed roof decks over parking, etc). Ultimately the team felt that the design included in this response package struck the best balance of efficiency in land use while being able to provide the most affordability and program possible. Our proposed design is sensitive to the neighbors to the north by stepping away from the lot line while also focusing the bulk of the building out toward 4th and Catherine.

The development enhances the safety and activity along 4th and Catherine with the outward-facing lobby, gallery, and incubator spaces. The walks will continue the lively vibe of the surrounding area with parkway trees, pavers, and bike racks. The sustainability of the project will be on display at grade with photovoltaic panel sun shades over the windows at the upper floors on the southside of the building, electric vehicle charging stations, and ideally advanced stormwater reduction techniques at the parking area.

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D.2. ZONING STRATEGY

Zoning Matrix 121 E Catherine St

Zoning District: **D2 - Downtown Interface**
 Overlay Zoning District: **Area 7 Kerrytown**

Proposed Use: Multi-Family Housing, Gallery, Retail Sales

SITE DATA

Site Area	16,700 sf
Length	134'
Width	124'

BUILDING DATA

	REQUIRED	PROPOSED
Open Space	Min 10%	0%
FAR	up to 400, with Affordable Housing premium	367
Front Setback	Min 0' Max 10' at streetwall	0'
Side Setback	n/a does not abut any R district	5'
Rear Setback	n/a does not abut any R district	0'
Building Height	Min 24' / 2 Stories Max 60'	65'
Streetwall Height	Min 2 stories / Max 3 stories	3 Stories
Streetwall Offset	Average 5'	5'

PARKING CALCULATIONS

	REQUIRED	PROPOSED
Vehicle Parking		
Multi-Family Dwelling in non-residential district	1 per dwelling unit = 68	24
Gallery	Minimum 1 / 310 sf = 1	
Retail Sales	Minimum 1 / 310 sf = 1	
<i>Total Vehicle Parking</i>	70	
EV Parking		
	65% EV-C	12 (50%)
	25% EV-R	6 (25%)
	10% EV-I	6 (25%)
Bicycle Parking		
Multi-Family Dwelling in non-residential district	1 per 5 dwelling units = 14	17
Gallery	1/3,000 sf = 1 Class B 50% Class C 50%	
Retail Sales	1/3,000 sf = 1 Class B 50% Class C 50%	
<i>Total Bicycle Parking</i>	16	



D.3. INNOVATIVE AND EFFICIENT CONSTRUCTION

Innovative and Efficient construction techniques

Our team (General Contractor, Architect, and Engineers) is very familiar with working in the affordable housing market and understands how important it is to design and build as efficiently and rationally as possible.

The efficiency starts in the programming of the development—maximizing the affordable units that a site can reasonably include allows for efficient land use and stormwater management, minimal land disturbance and foundations, and compact site for construction.

The design and layout of the building also contributes greatly to efficiency. Designing with double-loaded corridors at the upper levels minimizes space dedicated to circulation, and reduces the ratio of exterior wall to unit. The proportion/shape of the residential units in the plan are either square or “narrow-deep” to again minimize space dedicated to circulation as well as minimizing building envelope. The residential units, and specifically the kitchens and baths, will stack for efficient distribution of plumbing, electrical, and HVAC up through the building.

Efficiency can be gained through construction techniques and choices as well. Floor to floor heights will be set to be high and spacious, but utilize full drywall sheets to minimize waste. Window and storefront openings are aligned down the face for more efficient framing and structural loading. We will also minimize the number of different window sizes and shapes, while still developing interest and variety in the facade. The team intends to design and plan the building such that as many elements as possible can be pre-fabricated off-site and delivered to the project site for assembly, such as floor and roof trusses, wall panels, electrical and plumbing assemblies, etc. This aids in lowering costs, reducing waste, increases quality, and reduces construction schedule. These provide affordability, are built to a factory-inspected level, and can positively impact construction schedule.

Working on a tight, downtown infill site demands efficient construction techniques. This includes careful planning with the trade partners and suppliers to make sure that deliveries are staged appropriately. For this job we will be scheduling for materials to be delivered to the site at the time they need and not before. A tight site such as this does not lend itself to storing of materials on-site. We will also ensure the appropriate subcontractor is in place at the same time that their materials are being delivered. If it is an electrical delivery, the electrical subcontractor will be there to meet the delivery and bring the materials immediately to their required location.

We achieve this through solid communication throughout our team. There will be weekly formal progress meetings along with daily job site huddles that look back at what has been accomplished and confirm schedules for the upcoming few weeks. Clear, comprehensive and on-going communication is critical among the general contractor, subs and suppliers. A delivery checklist will be put in place, with the delivery schedule posted in the job office. Information about what materials are being delivered and when will be maintained. Communication around this will enable us to ensure multiple deliveries are not showing up at the same time.

Job sequencing will also be critical in order to ensure an efficient construction process. As we move further through the process, we will confirm sequencing decisions such as coordinating installation of stormwater detention with the crane storage to ensure the crane does not create issues by sitting above storm water detention areas. This could be addressed through sequencing, through the depth of the installation, and/or through sizing of pipes. This would be confirmed prior to the start of construction to ensure a smooth process.

We are planning to install a green roof, along with installing solar. The green roof brings about an efficiency enabling us to minimize the amount of underground stormwater detention. The amount of stormwater retention necessary will also be impacted by what we find regarding soils and infiltration.

The site does not allow much room for an on-site job trailer. Once enough of the building has been constructed, we would move our job site office into the building. Prior to that point, we would likely not have a job trailer on site, but would look to rent nearby space for a job office.

This proposal includes a number of innovative building techniques, particularly as they apply to green infrastructure. Our window shading, to lessen the heat from direct summer sunlight, will be achieved using solar panels, that produce electricity from that same light. This has only been feasible recently as the cost of solar panels has come down.

We also propose to include rooftop construction that has a green roof, with a solar array above. This also allows this space and application to achieve two sustainability goals at the same time—solar energy production and stormwater retention. Additionally, the green roof, by absorbing heat that would otherwise radiate back towards the solar array, helps make the solar panels more efficient.

D.4. GREEN AND SUSTAINABLE DESIGN

Green and Sustainable Design

To achieve a Net Zero ready building, our team will design a building that meets a minimum of 2020 Enterprise Green Communities Plus (EGC+) Certification and reaches for Passive House US Certification (PHIUS). Our vision is a beautiful, sustainable building that maximizes energy efficiency, water efficiency, and renewable energy while minimizing its environmental impact on surrounding infrastructure. Residents will have access to shared open space and indoor space with maximized natural lighting and an amazing view of the city. The building will be all-electric with a carefully designed building shell that minimizes air infiltration and maximizes heating and cooling efficiency. This will also create a healthier indoor environment with better air quality for residents. The building will also include highly efficient systems for heating, cooling, and ventilation as well as highly efficient appliances and water fixtures.

The site will feature publicly available electric vehicle charging stations which will also be utilized by maintenance staff and have potential for EV carshare available to residents. The bottom floor will be a combination of art gallery and small business incubator.

The rooftop will maximize the production of renewable energy and rainwater capture through co-location of a green roof and solar panels. Solar panels actually lose efficiency as temperatures increase, so green roofs can have a positive impact on solar production by absorbing the heat that would normally be reflected by a standard rooftop. Solar can also be sited over the rooftop common area for shading, similar to a pergola. The orientation of the building will maximize exposure to the east and south, and we will evaluate solar shading for the south face of the building to both generate additional renewable energy and reduce heat gain for units that have the most exposure to direct sunlight.

The above features will align with the City's goals of carbon neutrality by 2030. We envision this building being an active participant in City-led programs to decarbonize the community and have the potential to be a resource for the City if it decides to create a sustainable energy utility, traditional municipal utility or other local programs to provide clean energy to the community.

Achieving a minimum of 2020 Enterprise Green Communities Plus Certification means having 1) an integrative design approach that gives residents a voice in the design process 2) having a path to net zero energy and emissions 3) healthy living practices that result in a better indoor air environment and healing-centered design 4) efficient and healthy water standards 5) resilience to local climate hazards.

Some of the specific green elements we plan to incorporate include installation of low flow water fixtures, energy efficient lighting, Energy Star appliances, low or no-VOC paints and sealants, direct exterior venting, use of regional materials, use of materials with recycled content, environmentally preferred flooring (Floorscore or Green-label certified), and on-going data collection and monitoring. We will also maximize HVAC efficiency by positioning heat pumps in vertical stacks above housing units.

EGC+ has a mandatory requirement that the building be certified in a program that requires an advanced level of building envelope performance, such as the Department of Energy's Zero Energy Ready Homes and/or Passive House Institute (PHI) Classic or Passive House Institute US (PHIUS). We will determine the best pathway for this project through the development process, with a stretch goal of achieving PHIUS Certification. Achieving EGC+ also automatically qualifies for the WELL Building Standard, which focuses on 10 core concepts related to physical and mental health, including: air, water, nourishment, light, movement, thermal comfort, sounds, materials, mind, community, and innovation.

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E. FEE PROPOSAL

PROVIDED UNDER SEPARATE COVER



F. ATTACHMENTS



REQUIRED FORMS



ATTACHMENT B
LEGAL STATUS OF OFFEROR

(The Respondent shall fill out the provision and strike out the remaining ones.)

The Respondent is:

- A corporation organized and doing business under the laws of the state of Michigan, for whom Aubrey Patino bearing the office title of Executive Direct, or whose signature is affixed to this proposal, is authorized to execute contracts on behalf of respondent.*

*If not incorporated in Michigan, please attach the corporation's Certificate of Authority

- ~~• A limited liability company doing business under the laws of the State of _____, whom _____ bearing the title of _____ whose signature is affixed to this proposal, is authorized to execute contract on behalf of the LLC.~~
- ~~• A partnership organized under the laws of the State of _____ and filed with the County of _____, whose members are (attach list including street and mailing address for each.)~~
- ~~• An individual, whose signature with address, is affixed to this RFP.~~

Respondent has examined the basic requirements of this RFP and its scope of services, including all Addendum (if applicable) and hereby agrees to offer the services as specified in the RFP.

Signature  Date: 12/6/21,

(Print) Name Aubrey Patino Title Executive Director

Firm: Avalon Non Profit Housing Corporation

Address: 1327 Jones Drive Ste 102 Ann Arbor, MI 48105

Contact Phone 734-663-5858 Fax 734-663-4857

Email apatino@avalonhousing.org

**ATTACHMENT C
CITY OF ANN ARBOR DECLARATION OF COMPLIANCE**

Non-Discrimination Ordinance


The "non discrimination by city contractors" provision of the City of Ann Arbor Non-Discrimination Ordinance (Ann Arbor City Code Chapter 112, Section 9:158) requires all contractors proposing to do business with the City to treat employees in a manner which provides equal employment opportunity and does not discriminate against any of their employees, any City employee working with them, or any applicant for employment on the basis of actual or perceived age, arrest record, color, disability, educational association, familial status, family responsibilities, gender expression, gender identity, genetic information, height, HIV status, marital status, national origin, political beliefs, race, religion, sex, sexual orientation, source of income, veteran status, victim of domestic violence or stalking, or weight. It also requires that the contractors include a similar provision in all subcontracts that they execute for City work or programs.

In addition the City Non-Discrimination Ordinance requires that all contractors proposing to do business with the City of Ann Arbor must satisfy the contract compliance administrative policy adopted by the City Administrator. A copy of that policy may be obtained from the Purchasing Manager

The Contractor agrees:

- (a) To comply with the terms of the City of Ann Arbor's Non-Discrimination Ordinance and contract compliance administrative policy.
- (b) To post the City of Ann Arbor's Non-Discrimination Ordinance Notice in every work place or other location in which employees or other persons are contracted to provide services under a contract with the City.
- (c) To provide documentation within the specified time frame in connection with any workforce verification, compliance review or complaint investigation.
- (d) To permit access to employees and work sites to City representatives for the purposes of monitoring compliance, or investigating complaints of non-compliance.

The undersigned states that he/she has the requisite authority to act on behalf of his/her employer in these matters and has offered to provide the services in accordance with the terms of the Ann Arbor Non-Discrimination Ordinance. The undersigned certifies that he/she has read and is familiar with the terms of the Non-Discrimination Ordinance, obligates the Contractor to those terms and acknowledges that if his/her employer is found to be in violation of Ordinance it may be subject to civil penalties and termination of the awarded contract.

Avalon Housing Nonprofit Corporation
Company Name _____
 _____
Signature of Authorized Representative Date 12/6/21

Aubrey Patino Executive Director
Print Name and Title _____

1327 Jones Drive Suite 102 Ann Arbor, MI 48105
Address, City, State, Zip _____

apatino@avalonhousing.org
Phone/Email address _____

Questions about the Notice or the City Administrative Policy, Please contact:
Procurement Office of the City of Ann Arbor
(734) 794-6500

ATTACHMENT D
CITY OF ANN ARBOR
LIVING WAGE ORDINANCE DECLARATION OF COMPLIANCE

The Ann Arbor Living Wage Ordinance (Section 1:811-1:821 of Chapter 23 of Title I of the Code) requires that an employer who is (a) a contractor providing services to or for the City for a value greater than \$10,000 for any twelve-month contract term, or (b) a recipient of federal, state, or local grant funding administered by the City for a value greater than \$10,000, or (c) a recipient of financial assistance awarded by the City for a value greater than \$10,000, shall pay its employees a prescribed minimum level of compensation (i.e., Living Wage) for the time those employees perform work on the contract or in connection with the grant or financial assistance. The Living Wage must be paid to these employees for the length of the contract/program.

Companies employing fewer than 5 persons and non-profits employing fewer than 10 persons are exempt from compliance with the Living Wage Ordinance. If this exemption applies to your company/non-profit agency please check here No. of employees__

The Contractor or Grantee agrees:

- (a) To pay each of its employees whose wage level is not required to comply with federal, state or local prevailing wage law, for work covered or funded by a contract with or grant from the City, no less than the Living Wage. The current Living Wage is defined as \$14.05/hour for those employers that provide employee health care (as defined in the Ordinance at Section 1:815 Sec. 1 (a)), or no less than \$15.66/hour for those employers that do not provide health care. The Contractor or Grantor understands that the Living Wage is adjusted and established annually on April 30 in accordance with the Ordinance and covered employers shall be required to pay the adjusted amount thereafter to be in compliance with Section 1:815(3).

Check the applicable box below which applies to your workforce

Employees who are assigned to any covered City contract/grant will be paid at or above the applicable living wage without health benefits


Employees who are assigned to any covered City contract/grant will be paid at or above the applicable living wage with health benefits

- (b) To post a notice approved by the City regarding the applicability of the Living Wage Ordinance in every work place or other location in which employees or other persons contracting for employment are working.
- (c) To provide to the City payroll records or other documentation within ten (10) business days from the receipt of a request by the City.
- (d) To permit access to work sites to City representatives for the purposes of monitoring compliance and investigating complaints or non-compliance.
- (e) To take no action that would reduce the compensation, wages, fringe benefits, or leave available to any employee covered by the Living Wage Ordinance or any person contracted for employment and covered by the Living Wage Ordinance in order to pay the living wage required by the Living Wage Ordinance.

The undersigned states that he/she has the requisite authority to act on behalf of his/her employer in these matters and has offered to provide the services or agrees to accept financial assistance in accordance with the terms of the Living Wage Ordinance. The undersigned certifies that he/she has read and is familiar with the terms of the Living Wage Ordinance, obligates the Employer/Grantee to those terms and acknowledges that if his/her employer is found to be in violation of Ordinance it may be subject to civil penalties and termination of the awarded contract or grant of financial assistance.

Avalon Housing Nonprofit Corporation

 Company Name

 _____
 Signature of Authorized Representative

12/6/21

 Date

1327 Jones Drive Ste 102

 Street Address

Ann Arbor, MI 48105

 City, State, Zip

Aubrey Patino Executive Director

 Print Name and Title

apatino@avalonhousing.org

 Phone/Email address



ATTACHMENT E

VENDOR CONFLICT OF INTEREST DISCLOSURE FORM

All vendors interested in conducting business with the City of Ann Arbor must complete and return the Vendor Conflict of Interest Disclosure Form in order to be eligible to be awarded a contract. Please note that all vendors are subject to comply with the City of Ann Arbor's conflict of interest policies as stated within the certification section below.

If a vendor has a relationship with a City of Ann Arbor official or employee, an immediate family member of a City of Ann Arbor official or employee, the vendor shall disclose the information required below.

1. No City official or employee or City employee's immediate family member has an ownership interest in vendor's company or is deriving personal financial gain from this contract.
2. No retired or separated City official or employee who has been retired or separated from the City for less than one (1) year has an ownership interest in vendor's Company.
3. No City employee is contemporaneously employed or prospectively to be employed with the vendor.
4. Vendor hereby declares it has not and will not provide gifts or hospitality of any dollar value or any other gratuities to any City employee or elected official to obtain or maintain a contract.
5. Please note any exceptions below:

Conflict of Interest Disclosure*	
Name of City of Ann Arbor employees, elected officials or immediate family members with whom there may be a potential conflict of interest.	<input type="checkbox"/> Relationship to employee <hr/> <input type="checkbox"/> Interest in vendor's company <input type="checkbox"/> Other (please describe in box below)
NOT APPLICABLE	

*Disclosing a potential conflict of interest does not disqualify vendors. In the event vendors do not disclose potential conflicts of interest and they are detected by the City, vendor will be exempt from doing business with the City.

I certify that this Conflict of Interest Disclosure has been examined by me and that its contents are true and correct to my knowledge and belief and I have the authority to so certify on behalf of the Vendor by my signature below:		
Avalon Housing Nonprofit Corporation	734-663-5858	
Vendor Name	Vendor Phone Number	
	12/6/21	Aubrey Patino
Signature of Vendor Authorized Representative	Date	Printed Name of Vendor Authorized Representative

Questions about this form? Contact Procurement Office City of Ann Arbor Phone: 734/794-6500, procurement@a2gov.org

RESUMES



AVALON HOUSING, INC.





About Avalon

At Avalon, housing is a basic human right. Our mission is to build healthy, safe and inclusive supportive housing communities as a long-term solution to homelessness. We envision a community in which all our neighbors have stable homes and an opportunity to thrive.

Avalon Housing is a Washtenaw County nonprofit founded in 1992. We provide supportive housing for people who are homeless and who have behavioral and physical health challenges, including mental illness and substance use disorders. Supportive housing is a combination of affordable housing and support services that help people live more stable and productive lives. Today Avalon owns and operates 364 apartments at 28 sites in Washtenaw County. We provide support services to our tenants and to people living in public housing or in units owned by private landlords.

Who we serve

Avalon serves more than 850 clients in Washtenaw County, including 200 children. More than half of our clients live on less than \$800/month. Many deal with mental health issues, substance use disorders and/or physical disabilities.

How Avalon Supportive Housing Works

Housing First

We first offer housing to those in need. We then provide a broad array of supports, like case management, to help people stay housed. As a nonprofit real estate developer, Avalon owns and/or manages supportive housing units throughout Ann Arbor, Chelsea and Dexter. Properties are financed with a mix of non-traditional sources, including Low Income Housing Tax Credits, federal grants and rent subsidies, to reduce debt and guarantee permanent affordability.

Enhanced Property Management

At Avalon, our property management and services teams have the same goal – preventing eviction. They work together to creatively engage our tenants, meet their needs and keep them housed. Our property management teams provide periodic unit inspections, payment plans, community meetings and close coordination with our support services teams.

Community Building

Over 29 years of experience have taught us that building community is one of the most important parts of our work. We believe in the power of community to reduce isolation, foster hope and increase self-determination. Avalon has a wide range of programs to engage our residents and support at-risk youth, including:

- On-site community resource centers
- Food pantries
- Onsite community gardening
- Employment support
- VOCAL (Voices of Community Advocates and Leaders) resident leadership program
- Recovery groups, parenting support, financial management and enrichment programs
- Youth programs

Supportive Housing Services

All Supportive Housing residents are eligible to receive a wide variety of creative one-on-one supports and participate in our community programs. Individualized supports help tenants address behaviors and challenges that may lead to eviction and a return to homelessness. Essential supports include:

- Case management: assessment, goal setting and action plans
- 24/7 on-call crisis response

- Assistance with basic needs and maintaining a safe and healthy household
- Advocacy and support with health care, substance abuse and mental health systems
- In-home primary medical care with our Packard Health partners
- Medication management and transportation to critical appointments
- Parenting and child welfare support
- Peer support programs

Impact

Supportive housing is nationally recognized as the most effective long-term solution to homelessness. The combination of affordable housing and support services prevents evictions, increases stability and provides opportunities for recovery. With greater stability, people have the chance to realize their full potential. Avalon's retention rate, which measures the percentage of people who remain housed after one year, is 96%, compared to the national average of 84% for all supportive housing providers.



PROJECT FINANCING SUMMARY 2021

(includes funds for acquisition, new construction, rehabilitation and refinancing)

Low Income Housing Tax Credits	\$41,888,395 (52%)
Michigan State Housing Development Authority	\$10,479,677 (13%)
HOME/NSP Programs (HUD funds)	\$7,985,324 (10%)
MSHDA Homeless or Preservation (state funds)	\$ 1,869,343 (2%)
MSHDA Perm Loan	\$ 625,010 (1%)
City of Ann Arbor	\$ 9,571,543 (12%)
HOME/CDBG/NSP Programs (HUD funds)	\$6,886,077 (9%)
Ann Arbor Housing Trust Fund (local funds)	\$ 1,013,148 (1%)
Downtown Development Authority	\$ 1,372,318 (2%)
Millage	\$ 300,000 (<1%)
Washtenaw County	\$ 6,239,584 (8%)
HOME/CDBG Programs (HUD funds)	\$5,714,584 (7%)
Washtenaw County Funds (local funds)	\$ 525,000 (1%)
Federal Home Loan Bank (Chelsea State Bank, Old National Bank, Bank of Ann Arbor, TCF Bank, Bank of America, PNC Bank)	\$ 5,347,136 (7%)
Non-profit Lenders (Opportunity Resource Fund, LISC, CSH, Adrian Dominican Sisters, GLCF, Nehemiah Housing, Faith in Action, Foundations)	\$ 1,737,264 (2%)
Avalon equity	\$ 1,663,171 (2%)
Commercial Banks (Chelsea State Bank, Old National Bank, PNC, etc)	\$ 3,463,071 (4%)
Religious Action for Affordable Housing	\$ 200,000 (<1%)
Supportive Housing Program (HUD McKinney Funds)	\$ 74,508 (<1%)
TOTAL PROJECT FINANCING	\$80,629,088

Unit distribution (388 total):	SRO	21
(includes dev under cnstrxn)	Efficiency	37
	1-bedroom	193
	2-bedroom	102
	3-bedroom	35

* Total funds originating from Federal budget: \$62,548,888 (78%)





Property List

Properties owned by Avalon or its subsidiaries as of December 2021

1. **201 W. William St.**, 1925 wood frame house. Acquired 1992. 6 efficiency apartments.

Financing: \$216,193 total cost

\$100,000 City of Ann Arbor Housing Trust Fund

\$90,000 Tax credit syndication. Limited Partners National
City, Key, Comerica, Bank One

\$26,193 Michigan Housing Trust Fund



2. **532 N. Main St.**, 1900 brick house. Acquired 1992. 1 one-bedroom apartment & 6 sleeping rooms.

Financing: \$184,800 total cost

\$102,500 City of Ann Arbor HOME Funds & Housing Trust Funds

\$57,300 Great Lakes National Bank

\$25,000 Federal Home Loan Bank Affordable Housing Program



3. **518, 520, 522 S. Division St.**, 1900, 1910 & 1930 wood frame houses. Acquired 1993. 10 sleeping rooms & 3 efficiencies & 2 one-bedroom apartments & 1 two-bedroom apartment.

Financing: \$570,000 total cost

\$405,000 City of Ann Arbor HOME Funds & CDBG Funds

\$90,000 Federal Home Loan Bank Affordable Housing Program

\$75,000 Washtenaw County



4. **211 E. Davis St.**, 1940 concrete and stucco building. Acquired 1994. 14 efficiency apartments & 1 one-bedroom Pilot Light tenants organization unit.

Financing: \$524,250 total cost

\$334,250 City of Ann Arbor HOME Funds

\$95,000 Federal Home Loan Bank Affordable Housing Program

\$50,000 Michigan Housing Trust Fund

\$45,000 Washtenaw County



5. **Stimson Apartments**, 1959 & 1960 wood frame and brick veneer buildings. Acquired 1994. 18 one-bedroom units & 5 two-bedroom units

Financing: \$908,158 total cost

\$550,000 City of Ann Arbor HOME Funds & CDBG Funds

\$180,000 Federal Home Loan Bank Affordable Housing Program

\$70,000 Adrian Dominican Sisters

\$58,158 First of America/CCI

\$50,000 Washtenaw County



6. **610 W. Summit**, 1900 wood frame house. Acquired 1995. 5 efficiency apartments & 1 1-bedroom apartment

Financing: \$221,011 total cost

\$125,000 City of Ann Arbor HOME Funds

\$40,000 Federal Home Loan Bank Affordable Housing Program

\$40,000 Washtenaw County

\$16,011 Michigan Housing Trust Fund



7. **125 & 127 Allen**, 1963 block and wood frame duplexes. Acquired 1995/6. 4 2- bedroom apartments.

Financing: \$221,175 total cost

\$110,000 Michigan State Housing Development Authority

\$43,175 City of Ann Arbor HOME Funds

\$40,000 Washtenaw County

\$28,000 Federal Home Loan Bank Affordable Housing Program



8. **1217 W. Huron**, 1869 wood frame house. Acquired 1996. 5 efficiency apartments & 2 1-bedroom apartments.

Financing: \$363,025

\$153,925 City of Ann Arbor HOME Funds
\$110,500 Michigan State Housing Development Authority
\$40,000 Washtenaw County
\$38,500 Federal Home Loan Bank Affordable Housing Program
\$20,100 Local Initiatives Support Corporation



9. **115 & 119 N. Glendale**, 1963 block and wood frame duplexes. Acquired 1997. 4 2-bedroom apartments

Financing: \$285,000 total cost

\$124,000 Michigan State Housing Development Authority
\$124,000 City of Ann Arbor HOME Funds
\$25,000 Washtenaw County
\$12,000 Federal Home Loan Bank Affordable Housing Program



10. **Arbordale Apartments**, 1957 wood frame and brick veneer buildings. Acquired 1998. 34 1-bedroom apartments & 5 2-bedroom apartments & 1 2- bedroom service provision unit

Financing: \$4,615,975 total cost

\$2,061,815 Tax credit syndication: National Equity Fund, limited partner
\$1,400,000 MSHDA HOME Funds
\$730,000 City of Ann Arbor HOME Funds & Housing Trust Funds
\$178,660 General Partner Equity
\$175,500 Federal Home Loan Bank Affordable Housing Program
\$70,000 Washtenaw County



11. **411 N. Ashley**, 1900 wood frame house. Acquired 1998. 6 sleeping rooms & basement service provision office space.

Financing: \$369,213 total cost

\$136,105 Ann Arbor Downtown Development Authority

\$100,000 MSHDA

\$74,508 HUD-Supportive Housing Program

\$33,600 City of Ann Arbor Housing Trust Funds

\$25,000 Federal Home Loan Bank Affordable Housing Program



12. **1305 – 1313 Pontiac Trail**, 1968 wood frame & brick veneer duplexes. Acquired 2000. 4 2-bedroom apartments.

Financing: \$466,582 total cost

\$270,000 Corporation for Supportive Housing (bridge loan)

\$242,582 City of Ann Arbor HOME Funds & CDBG Funds

\$160,000 MSHDA

\$40,000 Washtenaw County

\$24,000 Federal Home Loan Bank Affordable Housing Program



13. **517 W. Summit**, 1992 wood frame duplex. Acquired 2003. 2 3-bedroom apartments.

Financing: \$316,075 total cost

\$150,000 City of Ann Arbor HOME Funds

\$81,075 Local Initiatives Support Corporation

\$60,000 MSHDA

\$25,000 Washtenaw County



14. **Carrot Way Apartments**, new construction wood frame buildings. Completion 2005. 6 1-bedroom, 16 2-bedroom & 8 3-bedroom units with an on-site community building.

Financing: \$5,484,128 total cost

\$2,600,144 Tax credit syndication: Great Lakes Capital Fund, limited partner

\$1,450,000 MSHDA HOME Funds

\$1,000,000 City of Ann Arbor HOME Funds

\$200,000 Religious Action for Affordable Housing

\$153,000 Federal Home Loan Bank Affordable Housing Program

\$80,984 General Partner Equity



15. **426 S. First**, 1966 Two-level, wood-frame building. Acquired 2006. 6 1- bedroom, 1 2-bedroom units.

Financing: \$1,078,950 total cost
\$525,000 City of Ann Arbor HOME Funds
\$300,000 MSHDA HOME Funds
\$153,950 Downtown Development Authority
\$75,000 LISC
\$25,000 Private Investment



16. **819 Third Street**, 1930 wood-frame brick veneer building. Acquired 2007. 2 Efficiency, 4 1-bedroom units.

Financing: \$1,000,000 total cost
\$500,000 MSHDA
\$415,000 City of Ann Arbor HOME Funds
\$60,000 Downtown Development Authority
\$25,000 Washtenaw County



17. **1675/1677 Broadway**, 1928 wood-frame, brick veneer building. Acquired 2007. 2 1-bedroom, 1 2-bedroom and 1 3-bedroom units

Financing: \$780,000 total cost
\$360,000 MSHDA
\$355,000 City of Ann Arbor HOME Funds
\$40,000 Federal Home Loan Bank
\$25,000 Washtenaw County



18. **Pear St. Apartments**, 1960's block apartment building, Acquired 2008. 20 1- bedroom apartments.

Financing: \$2,770,000 total cost

\$1,000,000 Tax credit syndication: Great Lakes Capital Fund, limited partner

\$845,000 City of Ann Arbor HOME Funds

\$500,000 MSHDA Homeless Initiatives Funding

\$225,000 Nonprofit loan: Capital Fund Services

\$200,000 Federal Home Loan Bank Affordable Housing Program



19. **701 Miller**, 1965 wood frame apartment block with stucco veneer, acquired 2011. 22 2-bedroom units and 1 Efficiency plus a Community Center.

Financing: \$3,723,964 total cost

\$1,456,120 MSHDA NSP

\$598,889 Washtenaw County HOME Funds

\$567,166 City of Ann Arbor HOME Funds

\$410,263 City of Ann Arbor NSP

\$263,425 Ann Arbor DDA

\$230,000 Federal Home Loan Bank

\$103,598 Washtenaw County CDBG

\$94,503 Deferred Developer Fee



20. **Pauline Apartments**, 2013 wood frame buildings. 6 1-bedroom units, 14 2- bedroom units, and 12 3-bedrooms, plus a Community Center.

Financing: \$10,847,544 total cost

\$6,934,800 Tax Credit Syndication: NEF, limited partner

\$2,318,324 MSHDA HOME Funds

\$750,000 Federal Home Loan Bank

\$500,000 Washtenaw Urban County CDBG

\$344,320 Deferred Developer Fee

\$100 General Partner Capital Contribution



21. **815/821 Gott Street**, 1901 wood frame triplexes. Acquired 2016. One efficiency, four one-bedroom, one two-bedroom apartments.

Financing: \$984,620 total cost

\$375,000 Washtenaw County HOME

\$368,720 Federal Home Loan Bank

\$183,400 Perm Loan Chelsea State Bank

\$50,000 City of Ann Arbor Affordable Housing Fund

\$7,500 Deferred Developer Fee



22. **Sharon Ann Apartments, Chelsea** 1901 wood frame triplexes. Acquired 2017. 14 one-bedroom apartments, plus an onsite Community Center.

Financing: \$2,819,867 total cost

\$1,936,415 Tax Credit Syndication: Cinnaire, limited

\$500,000 Federal Home Loan Bank

\$250,000 Perm Loan Chelsea State Bank

\$66,352 Deferred Developer Fee

\$50,000 Sponsor Loan

\$17,000 Faith in Action Loan

\$100 GP Equity



23. **100/102 & 112/114 Glendale**, 2 1960's wood frame, brick veneer duplexes. Acquired 2017. 4 two-bedroom apartments.

Financing: \$613,333 total cost:

\$33,333 new financing + \$580,000 in assumed debt

\$33,333 Ann Arbor Housing Trust Fund (new)

\$240,000 MSHDA HOME (assumed)

\$300,000 City of Ann Arbor HOME (assumed)

\$40,000 Washtenaw County (assumed)



24. **1911/1913 Dexter**, 1 1960's wood frame, brick veneer duplex. Acquired 2017.
2 one-bedroom apartments.

Financing: \$162,667 total cost:
\$16,667 new financing + \$146,000 in assumed debt
\$16,667 Ann Arbor Housing Trust Fund (new)
\$129,000 City of Ann Arbor HOME (assumed)
\$17,000 Washtenaw County (assumed)



25. **104/106 & 124/126 Glendale**, 2 1960's wood frame, brick veneer duplexes.
Acquired 2018. 2 two-bedroom apartments and 2 3-bedroom apartments.

Financing: \$1,020,402 total cost
\$565,402 Washtenaw County HOME
\$290,000 Federal Home Loan Bank
\$165,000 Perm Loan Chelsea State Bank



26. **108/110 Glendale**, 1965 wood frame, brick veneer duplex. Acquired 2020.
2 two-bedroom apartments.

Financing: \$558,830 total cost
\$310,000 County HOME
\$99,999 Federal Home Loan Bank
\$91,831 Perm Loan Level One
\$57,000 Ann Arbor Affordable Housing Fund



27. **Hickory Way Apartments Phase I**, New Construction wood frame building. 34 1-bedroom units, elevator and an on-site Community Center, Clinic and Fitness Area.

Financing: \$10,457,466 total cost
\$8,276,172 LP Equity
\$1,100,000 Perm Loan
\$690,936 County HOME
\$434,934 FHLBI AHP
\$260,227 Deferred Fee
\$130,004 Ann Arbor Housing Fund
\$100 GP Capital



28. **Hickory Way Apartments Phase II**, New Construction wood frame building. 36 1-bedroom units, elevator and use of HWA I Community Center, Clinic and Fitness Area.

Financing: \$10,638,114 total cost
\$8,540,803 LP Equity
\$1,000,000 Permanent Loan
\$450,000 Ann Arbor Affordable Housing Fund
\$321,515 FHLB Sponsor Loan
\$289,196 Deferred Fee
\$36,500 County HOME Funds
\$100 GP Capital



29. **Hilltop View Apartments**, New construction, wood frame building. 8 1-bedroom units; 10 2-bedroom units; and 3 3-bedroom units, plus a Community Center and Food Pantry.

Financing: \$8,707,999 total cost
\$7,609,616 LP Equity (LIHTC)
\$400,000 Sponsor Loan-FHLB
\$320,000 Permanent Loan
\$290,000 Washtenaw Urban County
\$50,000 David and Louis Lutton Fund
\$20,100 GP Capital
\$18,283 Deferred Fee





Wendy Carty-Saxon — Director of Real Estate Development

Wendy is Avalon's Director of Real Estate Development. She has been with Avalon since 1998, starting as Asset Manager, and has been responsible for Avalon's real estate development activities since 2005.

Wendy has closed on numerous new acquisition projects, resulting in two hundred nine (209) affordable and supportive housing units, and preserved many others through rehab and refinance. Wendy has secured development financing from private and public sources including low income housing tax credits, HUD HOME, CDBG and Neighborhood Stabilization Program, MSHDA, and private financing. She also has worked closely on many projects with local funders including the Washtenaw County Office of Community and Economic Development, the City of Ann Arbor and the Ann Arbor Downtown Development Authority. Wendy has a Master of Urban Planning degree from the University of Michigan, focusing in Housing and Community Development.

Wendy L. Carty-Saxon

Professional Experience

Avalon Housing, Inc., Ann Arbor, Michigan

August 1998-Present

Director of Real Estate Development 2008-present
Housing Development Specialist, 2005-2008

Responsibilities include project acquisition and development, including securing permanent financing such as low income housing tax credits, HOME funds, MSHDA Homelessness Initiative funding, and Federal Home Loan Bank. Proforma development, coordination with funders, refinancing of existing properties, including a resyndication, and exiting a year 15 tax credit property. Completed the Real Estate Development Training offered through CEDAM and MSHDA.

Director of Asset Management, 1999-2005

Preparation and submittal of reports for HUD, MSHDA and other funders, including HOME and Low Income Housing Tax Credits. Development of Standard Operating Procedures Manual. Development and implementation of evaluation systems for housing operations. Preparation of operating budgets for property management and maintenance activities. Contract review and development for supportive services.

Planning Consultant

1995-2002

Carty-Saxon, Ann Arbor, Michigan

Planning for public and affordable housing in Detroit, MI; Saginaw, MI; Boston, MA; and Springfield, IL. Preparation and implementation of Service Plans for HOPE VI sites, assistance with preparation of HOPE VI Revitalization Plans and Applications, facilitation of community and resident site development planning sessions through charrette process, assistance with development of site-based capital needs assessments, preparation of demolition/disposition applications, preparation of relocation plans and implementation of site-return policy.

HOPE VI Grant Coordinator

1998

Chester Housing Authority, Chester, Pennsylvania

Coordination and implementation of HOPE VI plan for housing development in Chester, with focus on the supportive services component. Activities include the development of a One-Stop Shop for resident employment and training services; outreach to residents, service providers and government agencies; review and evaluation of bid documents; monitoring of consulting contracts and preparation of HUD submittals.

Planning Analyst

1995

Capital Needs Unlimited, Detroit, Michigan

Assistance with preparation of approved HOPE VI Implementation Plan Application for Parkside Homes, Planning Grant Application for Parkside Annex and Herman Gardens, and Revitalization Plan for Parkside Homes, including development of services plan, and facilitation of community and resident planning sessions through hands-on "Real-Size/Real-Time" planning process.

Zoning Administrator

1992-1994

Northfield Township, Whitmore Lake, Michigan

Responsible for administration of zoning ordinance, assisting public with understanding ordinance regulations, site plan review, development of new database for filing system, update of zoning board of appeals and planning commission applications, assisting in ordinance rewrite, regular presentations at zoning board of appeals and planning commission meetings, research on site uses and history.

Planning Analyst

1993

On-Site Insight

Assisted in preparation of successful HOPE VI applications for two Detroit public housing sites. With focus on services, research and resident participation.

Education

Master of Urban Planning: The University of Michigan

1992

Ann Arbor, Michigan

Concentration in Housing and Community Development



Michael Appel — Senior Developer

Michael Appel has worked in the field of housing and community development for over 30 years. Beginning as a tenant organizer and housing advocate, he has extensive experience in housing development, organizing, advocacy and policy initiatives, as well as organizational leadership. Since 1993, he has worked at Avalon Housing, a local supportive housing provider, starting as Housing Development Specialist and later serving as Associate and then Executive Director. He is currently Senior Developer at Avalon. Since 2016, he has also worked at Develop Detroit, a non-profit real estate development organization, as a Senior Project Manager. In 2012, he initiated AppelWorks, a consulting firm through which he has worked on homeless grants and services with Continuum of Care organizations, the Ann Arbor Housing Commission and on private, affordable housing development. He has also taught Community Practice courses at the University of Michigan School of Social Work, led trainings and provided technical assistance.

He has developed over 260 units of permanent supportive housing at 23 different projects—with involvement from site selection through closing and rent-up. In settings as diverse as Ann Arbor and Detroit, he has brought together the various funding sources and public approvals necessary to acquire, renovate and/or build affordable housing. He has secured well over \$25 million in financing from public and private sources including LIHTC, HOME, FHLB, MSHDA, HUD, and both commercial and non-profit debt. His project management experience extends from initial concept and design through construction and occupancy. He has extensive compliance experience with both development and operational subsidy and grants. As a grant writer, he has successfully secured multiple HUD Homeless grants—both new and multi-year renewals—along with significant capital and programmatic grants from public and private funders.

MICHAEL J. APPEL

1127 Clair Circle
Ann Arbor, MI 48103

734-260-0331
appel.michaelj@gmail.com

EXPERIENCE and ACHIEVEMENTS

Senior Project Manager

2016 - present

Develop Detroit

Detroit, MI

Real estate development staff for start-up non-profit real estate developer focusing on housing and economic development in Detroit's neighborhoods.

- Identify and secure subsidized and commercial financing for mixed-income and low-income housing developments.
- Coordinate the assemblage of land for multi-parcel urban redevelopment.
- Assemble and lead development team, including architect, contractor, environmental and other specialist.
- Obtain local governmental approvals and meet regulatory requirements for local, state and federal financing.

Senior Developer (previously Executive & Associate Director)

1993 - present

Avalon Housing, Inc.

Ann Arbor, MI

Increasing and varied leadership responsibilities over 20+ years. Creatively assembled financing packages for 20-project, 260-unit stock of permanent supportive housing. Successful collaborative leadership at both the organizational, board and community levels.

- Successfully secured grants and loans worth over \$25 million from a wide range of funding sources—including new constructions, acquisition/rehab, re-syndication and refinancing.
- Extensive experience with grant writing, including federal funds awarded by City of Ann Arbor and Washtenaw County, Michigan State Housing Development Authority (MSHDA) and U.S. Department of Housing and Urban Development (HUD).
- Development and compliance experience with key funding sources, including:
 - *Low Income Housing Tax Credit (LIHTC)*
 - *HOME, CDBG, NSP, Continuum of Care Homeless Programs (HEARTH/SPC/SHP)*
 - *Federal Home Loan Bank Affordable Housing Program through multiple sponsors*
 - *LISC, CSH, Opportunity Resource Fund and Adrian Dominican Sisters*
 - *Private lenders for both construction and permanent financing*
 - *Compliance experience with HMIS, eSNAPS, and funder annual reporting (LIHTC, HOME).*
- Project management experience from predevelopment and public entitlements through construction and rent-up; coordination and oversight of development team partners.
- Collaborative leadership roles on local housing, human services and governmental boards. Helped draft housing portions of Plan to End Homelessness with Washtenaw Housing Alliance—local Continuum of Care Board. Close partner with County's Office of Community and Economic Development. Worked with City Council to gain tax abatement program for low-income housing projects. Active in community education efforts.
- Skilled in annual budget and project pro-forma development.
- Successfully developed fundraising events and participated in fundraising efforts.
- Work closely with Board of Trustees and Board committees.
- Supervised staff and interns; developed and implemented staff/board orientation.

EXPERIENCE AND ACHIEVEMENTS, continued

Principal/Owner **2012 - present**
AppelWorks LLC Ann Arbor, MI
Sole proprietor in consulting and technical assistance enterprise, providing services in housing and community development. MSHDA authorized Technical Assistance provider 2012 - present.

- Provide year-round planning and consulting services to improve homeless services and Continuum of Care compliance for Out-Wayne County (MI) Continuum of Care (2016 – present). Coordinate submission of Consolidated Application for HUD Homeless NOFA. (2014, 2015, 2016, 2017). Helped CoC secure first ever Planning Grants and Permanent Housing Bonus Grants.
- Researched and helped write Analysis of Impediments to Fair Housing under contract to Fair Housing Center of Southeast and Mid Michigan for the City of East Lansing. (2015)
- Supported private developer in project expansions using LIHTC in Benton Harbor and Detroit, MI. (2014 & 2015)
- Drafted sub-grantee contracts for HUD Hearth Permanent Supportive Housing grants for Ann Arbor Housing Commission. (2014)
- Led Supportive Housing Development workshops in Michigan under contract to Corporation for Supportive Housing. (2013)

Lecturer/Adjunct Professor **2002 & 2012**
University of Michigan School of Social Work Ann Arbor, MI
Taught advanced practice course in Community Development (Spring/Summer 2012; 2002) and Community and Social Systems (Winter 2012).

Project Coordinator **1987 - 1993**
Housing Law Reform Project of Student Legal Services Ann Arbor, MI
Built local, statewide and regional coalitions on wide range of tenant and housing issues. Organized and advocated for housing equity and helped create low-income and fair housing organizations.

Tenant Organizer **1985 - 1986**
United Community Housing Coalition Detroit, MI
Organized tenant associations and conferences, led leadership training workshops, researched and wrote about code enforcement, rent control and homelessness.

PROFESSIONAL TRAININGS

- Asset Management Specialist, CHAM, 2014 – 2015
- Mixed Use Real Estate Development, National Development Council, 2015
- Advanced Project Development Program, Development Training Institute, 2004
- Management & Community Development Institute, Tufts University, 1993

CIVIC AND ORGANIZATIONAL LEADERSHIP

- Board Member of CEDAM, 2013 - present
- Founding Board member of Fair Housing Center of Southeast & Mid Michigan, 1991 to present
- Founding Board member of Religious Action for Affordable Housing, 1999 to 2012

CIVIC AND ORGANIZATIONAL LEADERSHIP, continued

- Board member of Washtenaw Housing Alliance (Continuum of Care Board), 2005 to 2012
- Board member of Homeplace Community Land Trust, 2002 to 2004
- City of Ann Arbor's Affordable Housing Steering Committee, 1999 - 2000
- City of Ann Arbor's Zoning Revision Committee, 1996 -1997
- Loan Review Committee of Michigan Housing Trust Fund, 1995 to 1997
- City of Ann Arbor Community Reinvestment Act Ordinance Task Force, 1994 - 1995
- Founding Board member of Avalon Housing, 1992 to 1993
- Board member of Shelter Association of Ann Arbor, 1991 to 1993
- Steering Committee member of Interfaith Council for Peace and Justice, 1990 to 1993
- City of Ann Arbor Housing Code Revision Committee, 1989 - 1991
- Board member of Ann Arbor Tenants Union, 1989 to 1992

PRESENTATIONS AND PUBLICATIONS

- *"Avalon Housing— Supportive Housing Development"* presentations to Housing Policy & Economics course at UM Taubman School of Architecture & Planning and to Local Government course at UM Ford School of Public Policy—2010- 2015
- *"Joint Ventures in Housing Development"* panelist at 2011 CEDAM Multi-family Housing Development Training
- *"Community Support for Supportive Housing"* panelist at 2010 Michigan Coalition Against Homelessness conference
- *"Fair Housing for Housing Providers"* panelist at 2009 Michigan Conference on Affordable Housing
- *"Developing Permanent Supportive Housing— Small Projects"* at Michigan Homeless Summit—2008
- *"But Where's the Money: Mixing & Matching Subsidies to Create Supportive Housing"* at 2007 Michigan Homeless Summit
- *"Beginners Guide to Creating Supportive & Service-Enriched Housing"* at 2005 Michigan Conference on Affordable Housing
- *"Creative Uses of HOME Funds"* panelist at 2004 Michigan Conference on Affordable Housing
- *"Best Practices in Utilizing Technical Assistance"* panelist at 2003 Corporation for Supportive Housing national conference
- *"Supportive Housing Development Overview"* at 2003 Michigan Conference on Affordable Housing
- *"Loan Denied: Racial Discrimination in Residential Lending Decisions by Financial Institutions in Washtenaw County,"* published by Fair Housing Center of Washtenaw County—1993
- *"From Emergency Shelter. . . to Permanent Housing: The obstacles to safe, decent, affordable housing encountered by battered women,"* published by Housing Law Reform Project and Michigan Coalition Against Domestic Violence—1990
- *"Don't Look Now! Fighting for Tenant Privacy Rights in Michigan,"* Shelterforce, Vol. XII, Number 4, March / April 1990
- *"A Resource Guide for Effective Housing Ministries,"* with Vicki Gillette and Susan Christian, Michigan Housing Coalition, 1989

EDUCATION

- M.A., Anthropology, University of Michigan, 1988.
- M.S.W., Community Organization, University of Michigan, 1986.
- B.A., Sociology / Anthropology, Judaic Studies, Oberlin College, 1983. (High Honors, Phi Beta Kappa).



Aubrey Patino – Executive Director

Aubrey Patino, MSW, has over a decade of experience working with people who are homeless and people with behavioral health challenges, specializing in serving a high needs population and engaging the most marginalized community members. She started at Avalon as a social work intern, and since then held the roles of Senior Property Manager, Services Team Leader, Director of Clinical Services, and finally Executive Director. Aubrey also gained experience working for a year at the Downtown Emergency Service Center in Seattle, WA – a national leader in the housing first movement. In 2014, she was selected by the National Alliance to End Homelessness as one of five homeless services providers across the country to complete the Transatlantic Practice Exchange where she was sent to the UK to study best practices in the field of housing and homelessness. Aubrey is a licensed Social Worker in the State of Michigan, with a Master’s degree in Social Work from the University of Michigan where she currently serves as a field instructor for MSW candidates. Her considerable expertise has helped Washtenaw County develop our community housing prioritization process and increase community awareness of harm reduction techniques. She is also a national leader in the movement to end homelessness who presents regularly at conferences on PSH and services for complex needs households.

Aubrey Patino, LMSW
3068 Turnberry Lane, Ann Arbor, MI 48108 • (734) 355-4426
aubreyw@gmail.com

EDUCATION:

- **December 2005: Master of Social Work**
University of Michigan, Ann Arbor, MI
- **Honors and Awards**
Recipient, Rosemary Sarri Award
Recipient, Abigail Lawler Alumni Scholarship
Recipient, Atlas Corps Service Fellowship
Nominee, Presidential Management Fellowship
- **June 2004: Bachelor of Arts in Comparative Religion and Philosophy with an Emphasis on General and Applied Ethics**
Minor: Social Work
Western Michigan University, Kalamazoo, MI

FELLOWSHIPS:

- *Transatlantic Practice Exchange Fellowship, National Alliance to End Homelessness, 2014:*
One of five US professionals working in the homeless assistance field selected to go to the UK and study/implement best practices
- *Atlas Corps Fellowship, Atlas Corps, 2011: Volunteer Director with Heart for Change:* Provided recruitment and volunteer management for international volunteers doing service work at a nonprofit agency in Bogota, Colombia

PROFESSIONAL SUMMARY:

Passionate professional with senior leadership experience providing comprehensive clinical and programmatic oversight to multi-disciplinary Housing First teams. Possess wide clinical and administrative skill set; adept at building community relationships and linkages; skilled at resolving conflicts and encouraging positive relationships; dedicated to supporting and guiding staff in professional development.

RELEVANT EXPERIENCE:

Avalon Housing, Ann Arbor, MI
Executive Director, Nov 2107-Present

Work with senior leadership staff and the Board of Trustees, responsible for overseeing the administration, programs, and development of the organization. Serve as the public face of the agency, responsible for giving the proper strategic direction and implementing an effective, inspiring vision in pursuit of the agency's Mission.

Director of Clinical Services/Associate Director, Services, 2012-2017

Responsibilities include program development and management, training, community advocacy, clinical leadership, grant writing, accreditation acquisition and maintenance, programmatic oversight, community building.

- Develop and implement department work plan, program work plans
- Serve on senior leadership team of agency
- Provide vision, creativity, and problem solving
- Implement and oversee best practice programs for multi morbid formerly homeless populations
- Oversight, clinical and administrative, of five teams, fifty plus personnel, providing ongoing intensive case management services to high acuity formerly or currently homeless and at risk individuals and families in supportive housing
- Serve as program lead for local CSH Social Innovation Fund initiative targeting frequent users of emergency systems who are homeless and SAMHSA CABHI grant
- Develop and implement programs to facilitate community building
- Serve on community workgroups dedicated homeless advocacy issues, including but not limited to coordinated assessment and Built for Zero campaign

- Serve on State Innovation Model, Harm Reduction, Opioid, and Substance Use/Mental Health workgroups with the Washtenaw Health Initiative
- Present at conferences locally and nationally on issues relating to supportive housing/ending homelessness
- Stay abreast of research pertaining to service provision and train staff on an ongoing basis accordingly
- Develop and maintain community partnerships to support complex behavioral health, physical health, employment, and pro-social support needs of clients
- Oversee data, compliance, and evaluation related to program outcomes
- Provide leadership role in acquisition and maintenance of accreditation standards

Avalon Housing/CSSW, Ann Arbor, MI

Housing Support Services Team Leader, 2010 - 2011

- Provided comprehensive clinical and programmatic direction and case consultation to a multi-disciplinary team providing outreach, engagement, medication management, and on-going intensive case management services to low income adults with severe & persistent mental disorders and/or co-occurring mental health/substance use disorders in a supportive housing setting
- Developed and facilitated community building activities
- Supervised and conducted intake evaluations and mental health assessments; with client participation, developed and supported treatment plans; facilitated linkages to long-term treatment resources when appropriate
- Assumed primary responsibility for coordination and supervision all aspects of clients' support and treatment plans.
- Responsible for 24 hour on call rotation for crisis intervention and emergency response

Avalon Housing, Ann Arbor, MI

Senior Property Manager, 2007- 2010

- Conducted all traditional activities of a landlord with the goal of minimizing eviction and maximizing housing stability for a permanent supportive housing provider while providing supervision and departmental oversight

Downtown Emergency Service Center, Seattle, Washington

Intensive Case Manager, HOST (Homeless Outreach Stabilization & Transition) Project, 2006-2007

- Participated as a member of a multi-disciplinary street outreach team providing outreach, engagement and on-going intensive case management services to homeless adults with severe & persistent mental disorders and/or co-occurring mental health/substance use disorders
- Conducted intake evaluations and mental health assessments; with client participation, developed support and treatment plans; facilitated linkages to long-term treatment resources when appropriate
- Assumed primary responsibility for coordinating all aspects of clients' support and treatment plans
- Advocated for clients' access to community resources and services, ensuring that clients' needs were met and rights maintained, consulted and collaborated with community providers to ensure continuity of care

Avalon Housing, Ann Arbor, MI

MSW Intern, 2004 - 2005

- Performed benchmark studies of housing policy issues for the local housing policy board
- Coordinated the supportive housing work group for the Washtenaw County Ten Year Blueprint to End Homelessness
- Did compliance monitoring/reporting to state and federal entities
- Wrote successful grants for program development
- Organized tenant forums for the evaluation of the supportive services program
- Organized the food access program with tenants, developed tenant newsletters

Michigan Neighborhood Partnership, Detroit, MI

Individual Development Account Program Assistant, 2004 - 2005

- Performed data entry and participant intake for a financial literacy training and asset based independence Individual Development Account Program
- Provided overall administrative support to IDA Program Director

- Assisted in grant research
- Coordinated financial literacy classes

Invited Speaking Engagements:

- Presenter, National Alliance to End Homelessness Youth and Families Conference, Houston, TX, 2017: “Transatlantic Practice Exchange”
- Presenter, Housing in Healthcare and Harm Reduction, Ann Arbor, MI, 2017: “Housing First and Harm Reduction”
- Presenter, Homeless Summit, Kalamazoo, MI, 2016: “Leveraging Medicaid in Supportive Housing: Successes and Challenges in the Context of a FUSE Model Targeting High Utilizers of Crisis Systems”
- Presenter, Center for Budget and Policy Priorities, Washington, DC, 2016: “Where Does the Housing Come From: Leveraging Federal, State and Local Housing Resources”
- Presenter, CSH Summit, Chicago, IL, 2016: “Eviction Prevention” “Tenant Empowerment” and “Substance Use and Recovery Housing National Convening” invited guest.
- Presenter, Zarrow Symposium, Tulsa, OK, 2016: “FUSE Model: 30 Communities Strong”
- Presenter, CSH Supportive Housing Summit, Chicago, IL, 2015: “Applying Lessons Learned from Targeting Frequent Users of Health Services”
- Presenter, CSH Social Innovation Fund Convening, Los Angeles, CA, 2014: “Harm Reduction in Supportive Housing”
- Presenter, National Alliance to End Homelessness Conference, Washington DC, 2014: “Lessons from Across the Pond: Transatlantic Practice Exchange”
- Presenter, National Alliance to End Homelessness Conference, Washington DC, 2013: “Connecting with Medicaid to Pay for Support Services”
- Presenter, Michigan Campaign to End Homelessness Conference, Frankenmuth, MI, 2013: “Frequent Users of Emergency Health Systems in Supportive Housing”
- Presenter, Michigan Conference on Affordable Housing, Lansing, MI, 2012 : “Fair Housing in Supportive Housing”
- Presenter, Grand Rapids Area Coalition to End Homelessness, Grand Rapids, MI, 2012: “Housing First: A Supportive Housing Model”

Volunteer Experience:

2011: Oxfam, Bogota, Colombia: Donor intelligence Volunteer
 2008-2010: Fresh Start Clubhouse, Ann Arbor, MI: Advisory Board Member
 2005: ACLU’S MI Battered Women’s Clemency Project, Ann Arbor, MI: Author, clemency petitions
 2005: Ecology Center, Ann Arbor, MI: Campaigner
 2004: Peace Jam, Kalamazoo, MI: Classroom facilitator
 2004: Project Mentor, Kalamazoo, MI: Mentor
 2004: Get Out the Vote, Ann Arbor, MI: Campaigner
 2004: Students Against Sweatshops, Kalamazoo, MI: Organizer

OTHER:

- Proficient in Spanish
- Licensed Social Worker in the State of Michigan
- Field instructor for the University of Michigan and Eastern Michigan University
- CPR/First Aid Certified
- CISM (Critical Incident Stress Management) Certified



Molly Smith, Director of Services

Molly Smith serves as the Director of Services for Avalon Housing, a supportive housing provider located in Washtenaw County, MI. In this role she provides clinical support and oversight to various teams and programs in the Services Department, while working as a liaison with community partners and property management.

Molly started out in direct care and became passionate about community inclusion and community based treatment, leading her into the field of supportive housing. She has extensive case management and leadership experience working with homeless high utilizers of health systems and behaviorally complex populations including adults with TBIs and co-occurring MI and SUDs. She is a licensed clinical Social worker, and received her Master's Degree from Eastern Michigan University with a concentration in mental health/chemical dependency

Molly Ann Smith

msmith@avalonhousing.org
(734) 827-4178

Work History

Director of Services

11/2016-Present

Avalon Housing, Ann Arbor, MI

- Develop and implement department and team work plans, staff development, and program work plans
- Serve on the senior leadership team of the agency, developing and implementing strategic goals and priorities
- Provide vision, creativity, and creative problem solving
- Implement best practice programs for multi morbid formerly homeless populations
- Oversight of teams providing ongoing intensive case management services to high acuity formerly or currently homeless and at-risk individuals and families in supportive housing.
- Research and write grants
- Develop and implement programs to facilitate community building for clients, including but not limited to community programming, recovery focused and mental health-oriented groups, other therapeutic groups
- Connect with and serve on community work groups with organizations dedicated to local, regional, and national homeless advocacy issues as needed
- Present at conferences locally and nationally on issues relating to supportive housing
- Stay abreast of research pertaining to service provision and train staff on an ongoing basis accordingly
- Develop and maintain community partnerships to support complex behavioral health, physical health, employment, and pro-social support needs of clients
- Oversee data and compliance related to service delivery
- Provide leadership role in acquisition and maintenance of accreditation standards

Team Leader

03/2015 – 11/2016

Avalon Housing, Ann Arbor, MI

- Provide guidance and leadership for start-up and ongoing operation of a new team
- Provide clinical/task supervision for 10+ staff of Support Coordinators, Peer Support Specialists, Residential Support Specialists, Community Builders, and Interns
- Supervise and manage day to day operations of program including staff schedules, payroll, tenant programs, and program budget
- Coordinate and maintain relations with community partners

Housing Support Services/FUSE Case Manager

01/2012 - 03/2015

Catholic Social Service/Avalon Housing, Ann Arbor, MI

- Provide direct case management and/or coordinate with case management in the community to provide continuity of service for participants.
 - Conduct comprehensive assessments and help tenants develop action plans to achieve goals
 - Assist tenants with accessing needed medical, mental health, substance use, and psychosocial supports
 - Communicate effectively with local community and external agencies as well as successfully foster relationships which enables needed resources to be accessible
-

Education

Master of Social Work

Eastern Michigan University, Ypsilanti, Michigan

04/2014

Bachelor of Science in Psychology

Eastern Michigan University, Ypsilanti, Michigan

04/2010

Certifications & Skills

- License Master Clinical Social Worker
- CPR/First Aid
- Certified CPI Instructor/Training



Brandyn Walker- Avalon's Real Estate Project Analyst

Brandyn began at Avalon Housing in November of 2020. Coming from a program specialist for The City of Ferndale Finance/Parks and Recreation Department, Brandyn brings a wide-ranging skillset in the planning and execution of multiple capital park improvement projects.

Brandyn also spent time working for MDOT (Michigan Department of Transportation) as a GIS Student Assistant where she collaborated closely with several GIS analysts to obtain necessary geospatial information for various MDOT capital projects including the Gordie Howe Bridge in Southwest Detroit.

Brandyn supports Real Estate Development through various activities such as assisting with the preparation of various funding applications including grant and Low Income Housing Tax Credit Application. Completing funder-provided checklists and seeing projects through from inception to closing. Brandyn also works with Avalon's operations departments to coordinate transition from development to property management.



PROFESSIONAL SUMMARY :

Energetic urban planning professional with experience managing capital projects and utilizing geographic information systems (GIS) to analyze data and design maps. I am seeking to leverage this experience to relocate and secure a role within urban planning. My excellent interpersonal skills, familiarity with current public policy issues and community development concerns, and proven organizational skills and attention to detail will confirm my qualifications for this role.

EXPERTISE

Urban Planning & Development

Geographic Information Systems (GIS)/ArcGIS

Project Management

Fundraising

Grant Writing

Data Analysis

MS Office Suite

(Advanced Word, Excel, PowerPoint, & Outlook)

EDUCATION

Bachelor of Arts (B.A.), Urban Studies & Planning

Minor: African American Studies

Relevant Coursework: Intro to Urban Studies, Intro to Urban Geography, Introduction to GIS, Urban & Regional Economics

Wayne State University

PROFESSIONAL EXPERIENCE

Real Estate Development Project Analyst

Avalon Housing, Ann Arbor, MI / November 2020-Present

- Assisting with the preparation of various funding applications, including grant and Low Income Housing Tax Credit applications. Obtaining and organizing all necessary documentation, preparing checklists and timelines, and completing funder-provided checklists.
- Participating in conference calls with architect’s, builders, funders and government officials regarding ongoing and prospective projects.
- Seeing projects from inception to closing
- Preparing development and construction draws
- Participating in creation and analysis of operating and development proformas for prospective projects

Program Specialist

City of Ferndale, Ferndale, MI / September 2019 – November 2020

- Leads the planning and execution of multiple capital park improvement projects simultaneously throughout Ferndale, a city comprised of +/- 20,000 residents.
- Manages the request for quote (RFQ)/competitive bid process with construction companies for projects up to \$1.5M; determines supplier based on expertise and cost competitiveness.
- Collaborates with the Community Economics Division (CED) and Giffles-Webster (civil engineering and community planning firm) to execute environmentally sustainable and ergonomically friendly projects.
- Collaborates directly with the Department of Public Works (DPW) to identify methods to reduce/optimize costs while remaining within established budgets.
- Solicits funding from local businesses through sponsorship packages to execute projects.
- Develops meeting agendas in Granicus for presentation to City Council and Board Members; these meetings provide status updates and address progress barriers such as funding.

Key Highlights & Accomplishments:

- Led the development of *Schiffer Park*, Ferndale’s one and only downtown park; reengineered the original park’s plan to reduce cost during the COVID-19 pandemic which resulted in successful project approval (estimated completion date of September 1, 2020).
- Secured \$90,000 in funding from *Ferndale Haus*, a luxury apartment complex located in Downtown Ferndale, to complete *Schiffer Park*.
- Wrote a grant which resulted in securing \$8,000 from the American Association of Dermatologists; these funds were used to implement shade structures and pavilions to reduce the risk of skin diseases in patrons.

GIS/Administrative Student Assistant

Michigan Department of Transportation, Southfield, MI / Jan 2019 – Sept 2019

- Collaborated closely with the GIS Analyst to obtain geospatial data from ArcGIS to develop maps.
- Utilized ArcGIS and ESRI to identify strategic locations on Michigan highways that required preventative maintenance and construction.

Key Highlights & Accomplishments:

- Developed a real-time progress update map utilizing ArcGIS, ESRI, and ArcMAP to identify areas of completion by landscapers on Michigan highways in collaboration with a team of 5 interns.



Donald Wesley, Construction Project Manager

Donald is a Construction Project Manager working closely with the Director of Real Estate Development and Real Estate Development team members to bring about successful new construction and rehabilitation developments, from design through construction completion, by overseeing the work of the General Contractors.

Donald assisted Avalon with reaching the milestone of completing construction on Hickory Way II Apartments and moving tenants into supportive housing. He is also assisting with the management of the Hilltop View supportive housing project in Dexter, Michigan, which will consist of five new apartment buildings with a community center.

Donald has 28 years of experience managing projects from the early planning phase throughout the final construction phase of the project. He has worked on many projects in Ann Arbor, Michigan, Washtenaw County, and the University of Michigan Medical Center Campus.

Donald has a Bachelor of Science degree in Architecture from Ohio State University and a Bachelor of Architecture degree from Lawrence Technological University. He is an active member of the American Institute of Architects and the United States Green Building Council, Detroit Regional Chapter.

Donald H. Wesley, AIA, LEED AP

1327 Jones Drive, Suite 102, Ann Arbor, Michigan 48105 ♦ (734) 827-4131 ♦ dwesley@avalonhousing.org

Professional Experience

Avalon Housing • Ann Arbor, MI

Construction Project Manager • August 30, 2021, to present

Donald Wesley is the current construction manager working closely with the Director of Real Estate Development and Real Estate Development Team members to bring about successful new construction and rehabilitation developments, from design through construction completion, by overseeing the work of the General Contractors. The Construction Project Manager provides insight and guidance in the project design process, coordinates communication with architects, General Contractors, and key consultants, and acts as the owner's rep and key interface with GC's during construction.

- Serve as Avalon's "Owners Representative" for new housing and rehabilitation projects.
- Work closely with consulting architects, engineers, environmental consultants, movers, and others to create a seamless project delivery.
- Monitors construction schedule and project budget.
- Support Facilities Manager with evaluating existing properties for repair and renovation needs.

Michigan Medicine ♦ Ann Arbor, MI

Project Manager | Senior Architect (Facilities Planning & Development) ♦ **November 1998 to August 2021**

Team leader for coordinating construction renovation projects. Responsible for developing project schedules, budgets and notifying administrators of project progress. Advise and counsel hospital administrators on the criteria for facility planning and design of the renovation and capital improvement projects. Coordinate construction, voice/data, equipment, and furniture activities. Coordinate meetings between consultants, hospital administrators, and facilities support team. Oversee activities of consultants for planning and design of and construction of capital projects. Prepare project investigation reports. Prepare plans for small renovation projects. Develop and implement action plans for temporary and long-term problems. Coordinate projects with Safety, Security, Hospital Information Technology, Infection Prevention, Construction Services, and support departments.

Highlights:

- Served on University of Michigan Campus Safety and Security Advisory Committee (2012-2013)
- Served on University of Michigan Voices of the Staff Environment Stewardship Committee (2011-2012).
- Participated in Michigan Medicine Youth Mentoring Program, 2002.
- Led the facilities team to develop Architectural Sustainability Design Guidelines for environmentally friendly renovation projects.

Smith Group, Inc. ♦ Detroit, MI

Project Architect | Team Lead ♦ August 1994 to November 1998

- Provided construction administration and onsite field support at GM Livonia, a two-year onsite assignment.
- Provided renovation planning and new construction for institutional facilities.
- Prepared construction drawings.
- Assist with the preparation of construction documents for Pontiac Osteopathic Hospital and Detroit Medical Center.

William Christo Architect, PC ♦ Detroit, MI

Intern Architect ♦ September 1991 to March 1992

- Assist with preparing construction drawings for Detroit Medical Center, Huron Valley Hospital, and Sinai Hospital.

Gunnar Birkerts and Associates, Inc. ♦ Ann Arbor, MI

Intern Architect ♦ January 1990 to November 1990

- Assisted with construction drawings for Duke Law School and Tom Monaghan's residence. Assisted with interior space planning for Domino's Farms Headquarters and building a model for the University of Torino, Italy.

Design Group Incorporated ♦ Columbus, OH

Intern Architect ♦ August 1986 to January 1990

- Assisted with preparing the Urban Design Guidelines for the City of Gahanna, OH, and preparing construction drawings for Ohio State Teachers Retirement Administration. Prepared schematic site plans for Gahanna Library. Prepared presentation drawings for Hamilton Retail Center.

Education

Lawrence Technological University, Southfield, MI

Bachelor of Architecture (5th-year professional degree), June 1993

Ohio State University, Columbus

Bachelor of Science, Architecture (4th-year degree), June 1986

Accreditation | Licensure:

United States Green Building Council, LEED AP

State of Michigan Registered Architect

State of Ohio Registered Architect

Professional Memberships & Activities

American Institute of Architects: Treasurer (2013-2014)

United States Green Building Council: Detroit Region Education Committee (2018, 2019, and 2020)



Masanari Nohara

Director of Finance

Masa has been with Avalon Housing for over 10 years: managing financial planning and analysis, leading Accounting, and driving organizational success for non-profit property management entities. Masa excels in analytical project management with a gift for leading agency-wide initiatives. Masa maintains a focus on key process improvements to help optimize reporting structures, educate and develop teams, and sustain a robust financial health for Avalon.

Masa received his Bachelor of Science in Business Administration from the University of Missouri-St. Louis. His majors were in Operations Management, Finance, and International Business.

MASANARI NOHARA

ANN ARBOR, MI 48104 • (734) 353-5824 • mnohara0214@gmail.com

FINANCE DIRECTOR with 10 years of experience managing financial planning and analysis (FP&A), leading Accounting, and driving organizational success for nonprofit property management entities. Analytical project manager with a demonstrated record of leading enterprise-wide initiatives in partnership with cross-functional stakeholders, implementing key process improvements to optimize reporting structures, educate and develop teams, and maintain robust financial health. Dedicated leader skilled at gaining buy-in with team members at all levels, employing strong relationship building and leveraging financial reporting capabilities to aid strategic planning and achieve long-term company objectives.

AREAS OF EXPERTISE

- ✓ Nonprofit Financial Oversight
- ✓ Strategic Planning & Execution
- ✓ Key Process Improvements
- ✓ Grant Compliance Management
- ✓ Cost & Resource Allocation
- ✓ Financial Management
- ✓ Team Education & Coaching
- ✓ Relationship Management
- ✓ Cross-Functional Collaboration

PROFESSIONAL EXPERIENCE & ACCOMPLISHMENTS

Avalon Housing, Inc. – Ann Arbor, MI

2010 – Present

Director of Finance

2019 – Present

- Operated as a key stakeholders of the Leadership Team, working closely with the Executive Director and Finance Committee of the Board to oversee complex enterprise financial management systems involving short- and long-term fiscal planning, forecasting and analysis, and strategic planning and execution.
- Collaborated with organizational leaders in developing the annual and multiyear budgets, along with overseeing financial investments and asset management to determine risk and safeguard fiscal health.
- Motivated exceptional team performance, trained both finance and non-finance staff to improve financial literacy, and utilized Kaizen events and efficiency studies to identify areas for improvement.
- Developed and maintained clear financial standards and policies in pairing with internal controls to establish a cohesive business environment while ensuring local, state, and federal regulatory compliance.
- Led mission-critical LIHTC auditing and A-133/Uniform Guidance audit with 100% compliance for seven years.

Controller

2013 – 2019

- Oversaw accounting for the parent entity and associated organizations, including auditing functions, accounts payable and receivable, payroll, grant and contract billing, cost allocation, and tenant ledger management.
- Fostered a culture of continuous improvement (CI) and stakeholder empowerment by overseeing IT capabilities and implementing new systems to improve efficiencies by 30%; integrated multiple technology tools and led software conversion projects to optimize communication and operational visibility.
- Maintained keen awareness of industry trends and emerging technologies, leveraging knowledge to consistently develop and improve team performance, integrate new tools and standards, and achieve long-term goals.
- Drove financial literacy across the enterprise for both finance and non-finance staff by leveraging an Open-Book management approach to foster increase engagement and understanding, improving overall operations.
- Led all facets of financial reporting involving budget development and monitoring, maintaining strategic communications with cross-functional stakeholders and executive leadership to safeguard mission alignment.
- Cultivated a positive work environment by implementing workplace wellness programs such as workplace pantry, free employee car wash, group exercise sessions, and food, cultural, and education sessions.

Additional Experience: **Avalon Housing, Inc.**, *Senior Accountant* | *Staff Accountant*

EDUCATION & CERTIFICATION

Bachelor of Science (BS) in Business Administration: University of Missouri-St. Louis

Majors: Operations Management, Finance, & International Business

Certified Public Accountant (CPA): License in Illinois

TECHNICAL SKILLS

Microsoft Excel | QuickBooks Online | Abila MIP Fund Accounting

LANDON BONE BAKER ARCHITECTS



Good
design
is for
everyone.

LANDON BONE BAKER ARCHITECTS

McCRORY
SENIOR APARTMENTS



Chicago Center for Arts and Technology (ChiCAT)

Our practice is committed to the role of housing in creating comprehensive, sustainable, and progressive urban development.

Established

1987

Location

1625 W Carroll Avenue
Chicago, IL 60612

Personnel

3 Founding Principals

5 Principals

1 Senior Associate Architect

2 Associate Architects

16 Project Architects/Designers

2 Administrative

IL License

No. 184.000201

Firm Overview

Landon Bone Baker Architects (LBBA) is a full-service architectural practice that has earned a strong reputation for bringing responsible, contextual design to multifamily affordable and mixed-income housing and neighborhood planning. The firm's portfolio of projects ranges from large to small scale urban developments; from single-room-occupancy buildings to affordable apartment rehabilitations; from daycare centers to comprehensive community redevelopment efforts. LBBA provides good design in a way that is engaging and respectful to residents, communities, and their neighbors in Chicago and the Midwest.

LBBA is distinguished by our community-based approach, working closely with city officials, neighborhood organizations, CDC's, and developers of affordable and mixed-income housing to create the best possible solutions. The team responds to the context, program, budget, and community concerns while integrating sustainability and health initiatives through engaged collaboration. LBBA's goal is to design comfortable, attractive, secure, and livable environments that help keep residents rooted in their communities. Operating under the philosophy that every person should have a decent place to live and that communities must have comprehensive, sophisticated, and progressive urban design, LBBA designs creative and cost-conscious solutions that reflect the clients' program, site, historical issues, energy usage, and budget constraints.

Over time, LBBA has grown more involved with the early stages of development and design, developing large- and medium-sized urban planning and building schemes for market rate, mixed-income, affordable, and subsidized housing projects. We are familiar with community development programs, applicable codes and requirements, and financing options which have helped LBBA establish a framework for best practice design and construction. Our best practices include green initiatives, sustainable development programs, alternative material development, sustainable landscape design, and coordination with the general contractor as a cost-containment measure. We are team players both within our own organization, which includes associate architects, engineers, and technical consultants; and we are team players on the development team as a whole.

CAPABILITIES + SERVICES

Collaborative, Integrated Process

Our integrated design process is one that **brings key project stakeholders together** early in the process to address major issues such as project goals, budget, sustainability, and schedule. It is an approach that empowers everyone impacted by the building and encourages **communication and collaboration** between the owner, architect, engineers, general contractor, consultants, property management, community members, and residents. We encourage **clear and frequent communication** to keep all partners informed and updated on the progress of design and construction.

Community Engagement + Creative Placemaking

Since its inception, LBBA's practice has been centered around relationships—cultivating existing partnerships and **expanding to embrace more people in the process**. Our holistic, tailored approach is informed by three decades of experience working in community-based work, and we are still working with many of the same clients and organizations to **build healthy communities and create new, unique partnerships**.

Strong collaboration acts as a catalyst for more viable, dynamic communities and increases the social sustainability of the building and neighborhood. We are experienced to lead, coordinate, collaborate and assist in a multitude of partnership types and engagement and outreach efforts, **from town halls and community charrettes** to the co-creation of furniture, art, and installation with residents. Some notable examples include:

- A decades-long partnership with community arts non-profit Archtreasures to transform people and communities through art-making in many of our mixed-income and supportive housing projects.
- In 2010, the firm founded LBBA Labs, a paid summer internship program for high school students that investigates neighborhood issues related to a current LBBA project through a community engagement process.
- A collaborative deconstruction process with Rebuilding Exchange in our adaptive reuse and rehab work that repurposes materials for walls, furniture, and built-in interior design.
- LBBA has been invited several times to share our design knowledge with Enterprise's Affordable Housing Design Leadership Institute as Design Resource Team members.

What we bring to the table is not only excellent architectural work but also shared **responsibility for a positive impact**.

Supportive Housing and Buildings

Our practice is committed to the role of housing and supportive buildings in creating comprehensive, sustainable, and progressive developments. We have designed over **5,000 units of affordable and supportive housing**, along with **social spaces for programs and services**. The designs strive to be simple but elegant and value the straightforward use of materials. **We design with dignity in mind**. Our holistic approach brings people into the process early and often to understand their needs, the populations served, and the project's relationships to the neighborhood and its surroundings. Together with clients and stakeholders, we create and explore opportunities to build community both in the building's design and use and throughout development stages via community engagement, creative place-making, and outreach. From urban farms to collaborative mosaics, the resulting work **connects people to place and uplifts the human spirit**, while also meeting budget, program, funding, and code requirements. The buildings are safe, secure, accessible, and integrated into the neighborhood.

Sustainable and Energy Efficient Design

We are committed to delivering high-quality architecture through innovative technology, energy efficiency, sustainability and with respect for client needs and project budgets. We have experience in delivering projects in all of the major certified sustainable programs and our goal is to **define environmental objectives with our clients** early in the process to achieve an integrated and cost-conscious design. In fact, LBBA was one of the first signatory firms signed onto the AIA 2030 Commitment—a challenge that calls for all new buildings, developments, and major renovations to be carbon-neutral by 2030.

LBBA's new and rehab projects feature as **tight and well-insulated a building shell** as possible, with high-efficient mechanical equipment to reduce carbon emissions and minimize energy bills. Over the years, we have refined our teams' understanding of sustainable practices, and where budgets and maintenance contracts allow, we specify advanced systems, balancing local utility costs against operation and maintenance costs. Tierra Linda, an affordable housing project developed by LUCHA and located in Chicago's Humboldt Park neighborhood, is one current example of an innovative green approach. This development includes **the first Passive House (PHIUS +2015) multifamily development in Chicago**. The building is part of a larger scattered-site housing project that was conceived and developed to **nurture health and healthy living**.



JEFF BONE FAIA

Founding Principal

An innovative leader and hands-on champion of affordable housing, Jeff nurtures the firm's grassroots approach to help nonprofit clients translate their vision. He regularly engage community members to co-create inventive, inviting, and sustainable spaces and places that transform lives, revitalize neighborhoods, and regenerate cities.

For a synergistic effect on LBBA projects, Jeff partners with unique non-profits, including Archi-treasures, on whose board he has served for years. This organization transforms people and communities through collaborative art-making. When affordable housing residents make art that becomes part of the architecture, they feel ownership and pride, thereby increasing social sustainability of buildings and neighborhoods.

Jeff has shaped best practices, codes, and policy in many capacities, including volunteering with Affordable Housing Building Code Group of the Business and Professional People for the Public Interest; advocating to preserve SROs and establish best practices in design/construction; and volunteering with Tiny House Working Group to champion new, sustainable and economical housing options. Jeff's built work has been honored with numerous awards, including multiple AIA Chicago Distinguished Building Awards and four prestigious First-Place Richard H. Driehaus Foundation Awards for Architectural Excellence in Community Design.

License

State of Illinois
State of Wisconsin
State of Missouri
State of Michigan
State of Virginia

Affiliations

American Institute of Architects College of Fellows
Chicago Tiny House Working Group, 2015–Current
City of Chicago DPD Advisory Board Member, 5 Year Housing Plan, 2018–2019
Architects/Designers/Planners for Social Responsibility (ADPSR), member
Ball State University College of Architecture Advisory Board
Archi-treasures, 2004-present, Board President 2008–2009
AIA Chicago Design for Aging Committee
Revolution Workshop Advisory Council

Competitions

AIA Homeless Shelter Competition, 2015
Architecture for Humanity: Open Architecture Challenge – Classroom, 2009
Chicago Public School Design Competition
City of Chicago, Green Homes Design Competition

Studio Teaching

School of the Art Institute
Illinois Institute of Technology

Contact

JBone
@LandonBoneBaker.com
(312) 212-0776

Education

1987 Bachelor of Architecture, Ball State University, Muncie, IN
1986 Bachelor of Environmental Design, Ball State University, Muncie, IN

Experience

1989–present Landon Bone Baker Architects, Chicago, IL
1987–1988 Johnson & Partners, London, England
1986–1987 Weese Hickey Weese, Chicago, IL

Select Projects

In-Progress 43 Antioch Kansas City Apartments | Kansas City, MO
New construction of (4) 2-story townhomes, (2) 2-flats, and community center
In-Progress Mariners Inn | Detroit, MI
New Construction of 48,00 sf mixed-used permanent housing development
In-Progress Ruth Ellis Clairmount Center | Detroit, MI
Multi-use facility; 25-30 units of housing for previously homeless LGBTQ youth
2019 La Casa Norte Pierce House | Chicago, IL
New construction of mixed-use community center and supportive housing
2017 Phil B. Curls Manor | Kansas City, MO
New construction of 4-story, 54-unit independent living senior facility
2017 Chicago Center for Arts + Technology (ChiCAT) | Chicago, IL
Gut rehab of existing warehouse building for state-of-the-art
2013 Harvest Commons Apartments | Chicago, IL
Historic preservation of 1920s art deco hotel for mixed-use supportive housing
2011 Roseland Place Senior Campus | Chicago, IL
New construction of intergenerational and senior independent housing

Select Lectures/Talks

2021 BSU/CAP Lecture: The Power of Good design: How collaboration can Transform Chicago's Neighborhoods.
2019 "Innovative Trends in Design, Sustainability, and Construction (Policy/Process)," IHDA IL Governors Conference
2018 Next Generation SRO Housing in Chicago: Securing the Future Success and Long-Term Stability of an Endangered Housing Type, Enterprise Community Partners

Select Awards

2020 Richard H. Driehaus Foundation Award for Architectural Excellence in Community Design, Third Place, CNDA—La Casa Norte
2019 Richard H. Driehaus Foundation Award for Architectural Excellence in Community Design, First Place (tie), CNDA—The Carling SRO
2019 AIA Chicago Distinguished Building Award Citation of Merit—ChiCAT



JACK SCHROEDER AIA, LEED AP

Principal

Jack Schroeder is a Principal at Landon Bone Baker Architects. With a strong commitment to community-based projects, Jack has focused on the field of multi-family housing, completing projects in Chicago, Kansas City, and downstate Illinois. Driven by the understanding that each resident has a unique definition of home, he has learned to approach each project with optimism, enthusiasm, and inclusiveness. In 2012, Jack was awarded the AIA Illinois John Wellborn Root Award which recognizes exemplary, noteworthy service or design talent of an AIA architect licensed less than 10 years, and in 2005 was named a finalist in the USGBC Natural Talent Competition.

His extensive knowledge of green building practices and progressive city planning has helped the firm minimize its buildings' environmental impact and improve the quality of life for residents. He was project manager for La Casa Norte's Solid Ground Supportive Housing Program, the Roseland Senior Campus, and Harvest Commons; three first-place winners of the Richard H. Driehaus Award for Architectural Excellence in Community Design. More recently, he has managed several mixed-use adaptive reuse projects for non-profit clients, including the Chicago Center for Arts and Technology (ChiCAT), La Casa Norte Pierce House, and the Dorchester Art + Housing Collaborative (DA+HC).

License

State of Illinois

Certifications

LEED AP

Affiliations

American Institute of Architects

Mentor + Volunteer

CPS Newhouse Competition

Adopt-a-School

Archi-treasures

After School Matters

Teacher

Marwen

Chicago Architecture Foundation

Design Critic

University of Illinois, Chicago

Illinois Institute of Technology

School of the Art Institute

University of Chicago

Charrettes

Outdoor Sculpture Workshop, archi-treasures, 2012

92nd Street Corridor, Claretian Associates, 2010

Contact

JSchroeder

@LandonBoneBaker.com

Education

2001 Bachelor of Architecture & Bachelor of Science in Environmental Design, Ball State University, Muncie, IN

Experience

2002–present Landon Bone Baker Architects, Chicago, IL

2000–2001 a3 design, Indianapolis, IN

1999–2000 Browning Day Mullins Dierdorf, Indianapolis, IN

Select Projects

In-Progress 43 Antioch Kansas City Apartments | Kansas City, MO
New construction of (4) 2-story townhomes, (2) 2-flats, and community center

In-Progress Mariners Inn | Detroit, MI
New Construction of 48,00 sf mixed-used permanent housing development

In-Progress Ruth Ellis Clairmount Center | Detroit, MI
Multi-use facility; 25-30 units of housing for previously homeless LGBTQ youth

2019 La Casa Norte Pierce House | Chicago, IL
New construction of mixed-use community center and supportive housing

2017 Phil B. Curls Manor | Kansas City, MO
New construction of 4-story, 54-unit independent living senior facility

2017 Chicago Center for Arts and Technology | Chicago, IL
Gut rehab of 4-story building for state-of-the-art school and community center

2016 Nelson Mandela Apartments | Chicago, IL
Scattered-site new construction of 72 units in 13 multifamily buildings

2015 The Burnham at Woodlawn Park | Chicago, IL
Mixed-use mid-rise with 65 senior apartments and community Resource Center

2014 Dorchester Art + Housing Collaborative | Chicago, IL
Adaptive reuse 32 mixed-income townhouses and new Arts Center

2013 Harvest Commons Apartments | Chicago, IL
Historic preservation of 1920s art deco hotel for mixed-use supportive housing

Presentations

2016 "Green Design for Affordable Housing Development," Enterprise Community Partners Sustainable Buildings Training

2014 "Preservation and Adaptive Reuse of the Viceroy Hotel," Lunch Talks@CAF

Select Awards

2020 Richard H. Driehaus Foundation Award for Architectural Excellence in Community Design, Third Place, CNDA—La Casa Norte

2018 Richard H. Driehaus Foundation Award for Architectural Excellence in Community Design, CNDA—Chicago Center for Arts and Technology (ChiCAT)

2016 AIA/Hud Secretary's Award for Creating Community Connection—DA+HC



ASHLEY WENDELA, AIA, LEED AP

Senior Project Architect

Ashley holds a Bachelor of Science in Architecture from the University of Michigan and Masters of Architecture from The University of Pennsylvania. Her past architecture experience ranges from small gallery renovations to complex, large scale corporate projects. Her work at LBBA has a strong focus on community based projects and supportive housing.

Ashley is interested in how architecture frames everyday life, from an urban to intimate scale. She believes architecture can make cities more humane, beautiful, and sustainable, and she pursues these ideals on her projects at LBBA.

License

State of Illinois

Affiliations

LEED AP

American Institute of Architects

Contact

AWendela

@LandonBoneBaker.com

Education

- 2008 Masters of Architecture, University of Pennsylvania, Philadelphia, PA
- 2005 Bachelor of Science in Architecture, University of Michigan, Ann Arbor, MI

Experience

- 2015–present Landon Bone Baker Architects, Chicago, IL
- 2013–2015 Gensler, Chicago, IL
- 2012–2013 G. Goldberg & Associates, Chicago, IL
- 2011–2012 VOA, Chicago, IL

Select Projects

- In-Progress Mariners Inn | Detroit, MI
New construction of 48,000 sf mixed-use permanent housing development
- In-Progress Ruth Ellis Clairmount Center | Detroit, MI
Multi-use facility; 25-30 units of housing for previously homeless LGBTQ youth
- In-Progress National Public Housing Museum | Chicago, IL
Adaptive reuse of Jane Addams Homes into a permanent museum
- In-Progress West Englewood Tiny Home Development | Chicago, IL
10 Tiny Homes and Community Center
- 2019 La Casa Norte | Chicago, IL
New construction of mixed-use community center and supportive housing
- 2018 Tierra Linda | Chicago, IL
43 affordable units in 12 infill, scattered-site buildings for healthy living
- 2017 Kenmore Plaza Senior Apartments | Chicago, IL
Rehabilitation of 324 units in 28-story residential high-rise

Mentor + Volunteer

- 2015–2019 Marwen Career Day
- 2014–2015 Marwen Renovation—Design Volunteer (Gensler Chicago)
- 2014–2015 City Year Design Volunteer (Gensler Chicago)

Exhibitions

- 2016 Chicago Architecture Foundation: 50 Designers, 50 Ides, 50 Wards

Competitions

- 2012 Chicago Prize Competition: Future Prentice, 3rd Place

Select Awards

- 2020 Richard H. Driehaus Foundation Award for Architectural Excellence in Community Design, Third Place, CNDA—La Casa Norte



RONEL CONSTANTIN ASSOC. AIA

Project Designer

Ronel Constantin holds a master’s degree in architecture from the School of the Art Institute of Chicago, and a Bachelor of Fine Arts degree in Interior Design from Ringling College of Art and design. He is an experienced architectural designer with a demonstrated history in institutional, civic, residential, and corporate interiors. Ronel is passionate about designs that challenge rigid boundaries and question the ability of architecture to foster diplomatic exchange between communities.

Affiliations

American Institute of Architects (AIA), Associate Member

Contact

RConstantin@landonbonebaker.com

Education

- 2017 Masters of Architecture, The School of The Art Institutes of Chicago, Chicago, IL
- 2013 Bachelors of Fine Arts Interior Design, Ringling College of art and Design, Sarasota, FL

Experience

- 2018–present Landon, Bone, Baker Architects, Chicago, IL
- 2018–2021 STR Partners Architects, Chicago, IL
- 2017–2018 Krueck Saxton Partners, Chicago, IL
- 2015–2016 Searl Lamaster Howe Architects, Chicago, IL
- 2015–2016 IA Interior Architects, Chicago, IL

Select Projects

- In-Progress 835 W Wilson | Chicago, IL
New Construction of 73 affordable housing units for seniors
- In-Progress Victory Apartments | Chicago, IL
Rehabilitation of 107 multifamily units scattered throughout nine buildings
- 2020 Pleasantdale Elementary + Middle School Library (STR Partners) | Pleasantdale IL,
Library renovation of two school in Pleasantdale and modifying office layouts
- 2019 Harper Elementary School New addition (STR Partners) | Wilmette, IL
New addition to existing classrooms
- 2019 Northwestern University Sherman Building (STR Partners) | Evanston, IL
Interior rehab including existing suite expansion and modified office layout
- 2013 Tervis Tumbler Innovation Center (Hall Darling Studio) | Sarasota Fl,
New construction as an addition to Tervis Tumbler campus

Volunteering/Mentorship

- 2017–2018 Noma Associate member, Project Pipeline (Chicago)

LOW INCOME HOUSING TAX CREDIT PROJECTS

Landon Bone Baker Architects has extensive experience designing Low Income Housing Tax Credits (LIHTC) financed projects. To date, the firm has completed over 2,000 LIHTC-funded units. The full list of the firm's completed and in-process LIHTC projects is copied below:

Applied	AFG Burt Road; Detroit, MI; 45 units
Applied	Raymond E. Sheppard House; Ferndale, MI; 53 units
In-Progress	43 Green; Chicago, IL; 91 units
In-Progress	The Chicago Lighthouse; Chicago, IL; 76 units
In-Progress	Westhaven IID; Chicago, IL; 96 units
In-Progress	Mariners Inn; Detroit, MI; 84 units
In-Progress	37th Street School Senior Housing; Milwaukee, WI; 49 units
In-Progress	43 Antioch; Kansas City, MO; 66 units
In-Progress	Ruth Ellis Center; Detroit, MI; 42 units
In-Progress	Urbana Arts Center; Urbana, IL; 56 units
In-Progress	Victory Apartments; Chicago, IL; 107 units
Under Construction	Mercy—Miriam Apartments; Chicago, IL; 66 units
Under Construction	Anthony Place Senior Residences; Ottawa, IL; 56 units
Under Construction	Spring Hill Senior Residences; West Dundee, IL; 61 units
2019	The Marshall Hotel; Chicago, IL; 90 units
2018	East Park Apartments; Chicago, IL; 153 units
2018	Highlander; Omaha, NE; 85 units
2018	The Carling Hotel; Chicago, IL; 80 units
2018	McCrory Senior Housing; Chicago, IL; 62 units
2017	Highland Green; Urbana, IL; 33 units
2017	IFF Access Housing; Chicago, IL; 54 units
2017	City Gardens; Chicago, IL; 76 units
2017	Phil B. Curls Manor; Kansas City, MO; 54 units
2016	Lafayette Terrace Apartments; Chicago, IL; 42 units
2016	Casa Heritage; Chicago, IL; 143 units
2015	West Humboldt Place; Chicago, IL; 13 units
2015	The Burnham at Woodlawn Park; Chicago, IL; 65 units
2014	Dorchester Art+Housing Collaborative; Chicago, IL; 32 units
2014	Fred & Pamela Buffet Place; Chicago, IL; 51 units
2013	LUCHA Borinquen Bella Apartments; Chicago, IL; 47 units
2013	The Grant at Woodlawn Park; Chicago, IL; 33 units
2013	Harvest Commons; Chicago, IL; 89 units
2013	9100 S. Burley; Chicago, IL; 8 Units
2012	Westwood Apartments Rehab; Chicago, IL; 102 units
2011	A Safe Place; Zion, IL; 20 units
2011	Village Apartments Grandfamily; Chicago, IL; 10 units
2011	Roseland Place Senior ILF; Chicago, IL; 60 units
2010	Rosa Parks Apartments; Chicago, IL; 94 units
2010	Westhaven Park IIC; Chicago, IL; 44 units
2010	Crystal View Townhomes; Urbana, IL; 50 units
2009	The Jackson at Woodlawn Park; Chicago, IL; 67 units
2008	Renaissance Apartments; Chicago, IL; 54 units
2008	Park Boulevard; Chicago, IL; 36 units
2007	Harriet Tubman Apartments; Chicago, IL; 28 units
2006	Douglass Square; Champaign, IL; 50 units
2005	Harold Washington; Chicago, IL; 87 units
2004	LUCHA Affordable Housing; Chicago, IL; 61 units
2004	Woodson Complex; Chicago Heights, IL; 16 units
2004	Archer Courts Townhouse; Chicago, IL; 43 units
2001	Barbara Jean Wright Courts; Chicago, IL; 268 units
2000	Roseland Ridge Apartments; Chicago, IL; 40 units

La Casa Norte

Chicago, IL

Client: La Casa Norte

Completed: 2019

La Casa Norte is a new mixed-use, comprehensive community center in Humboldt Park on the city's Near Northwest Side. Services include a homeless youth drop-in center, healthcare center, café and food pantry, and Pierce House, 25 units of permanent supportive housing for people experiencing homelessness. The design blends highly social spaces at the front of the building with more discrete areas that meet a need for confidentiality, including the residences surrounding a private courtyard. The project respects the existing neighborhood fabric, fitting snugly into the low-rise urban context. It provides an innovative and environmentally friendly home for the residents, employees, and community.

In addition to the large open lobby functioning as a welcoming beacon to the neighborhood, it is large in scale to minimize focus on individuals entering the facility, preserving their privacy. Visitors are immediately greeted by staff at the entry desk who can direct them to spaces throughout the building. The programs and functions requiring additional privacy are located near the back of the building, accessible via protected entry points. Similarly, residential entry is separate and secure to protect residents' confidentiality. Many of the residential units face a private, distinctively-shaped interior courtyard in the center of the building. The Teen Center located on the ground floor provides an open performance stage for youth to enjoy with a workspace and computer lab as well as comfortable furniture. The exterior glazed street façade provides striking transparency while bringing abundant natural light to the interior of the building. La Casa Norte Pierce House has received LEED Gold Certification.

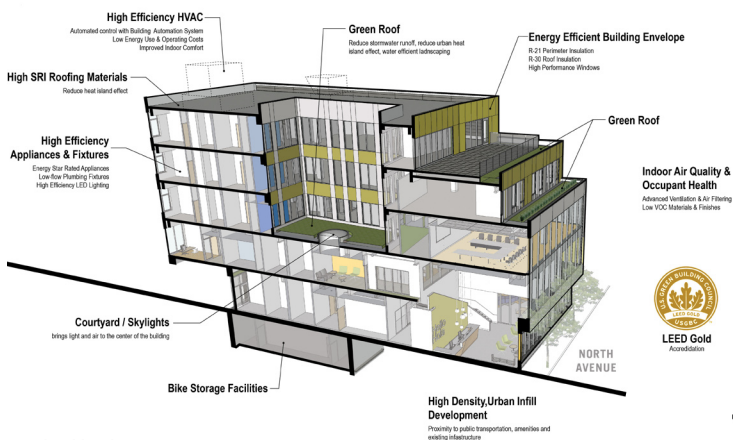
Preceded by the Solid Ground Supportive Housing Program this is the second of two supportive housing and community center developments in collaboration with La Casa Norte.

<https://www.landonbonebaker.com/work/la-casa-norte-pierce-house/>

LANDON BONE BAKER ARCHITECTS 1625 W Carroll Ave Chicago IL 60612 www.landonbonebaker.com



North Facing Elevation



Sustainability Diagram



First Floor Plan



Green Roof Courtyard



Lobby

McCrorry Senior Housing

Chicago, IL

Client: First Baptist Congregational Church and Brinshore Development

Completed: 2018

McCrorry Senior Apartments is the development of a stretch of ten vacant lots on Chicago's Near West Side into 62 units of affordable housing for low-income seniors. The project is a transit-oriented development located in a highly desirable area, just three blocks from United Center and walkable or easily accessible to restaurants, retail shops, supportive services, and healthcare facilities.

As growth from the West Loop ventures farther into the Near West Side, McCrorry preserves affordability for seniors who may be priced out the neighborhood and provides them community-based, independent living for aging-in-place.

The building is designed to encourage social engagement, offering places for residents to meet and gather. The building's exterior is clad with brick and cast stone, aluminum panel bays, and fiber-cement siding on the rear of the building and features "front porch" seating with a focus on a positive pedestrian experience. The apartments are a mix of 48 one-bedrooms and 14 two-bedrooms with numerous amenities including a community space, fitness room, management office, 24-seat multimedia theater, and rear patio. Additionally, as a partnership of Brinshore Development and neighboring First Baptist Congregational Church (FBCC), the residents benefit by the services, programming, and social activities offered by FBCC.

McCrorry Senior Apartments has received Energy Star Certification. The building manages storm water on site with rain gardens and permeable pavers. Other sustainable features include Energy Star appliances and lighting plan; low-VOC wood finishes, paints, sealers, carpet; garbage and recycling chutes for building-wide recycling plan; water-conserving fixtures and faucets; and native, drought-tolerant landscaping.

<https://www.landonbonebaker.com/work/mccrorry-senior-apartments/>

LONDON BONE BAKER ARCHITECTS 1625 W Carroll Ave Chicago IL 60612 www.landonbonebaker.com



View from Washington & Paulina



Entry Artwork



Elevation Detail



Lobby



Community Garden



View of 8-Unit Building



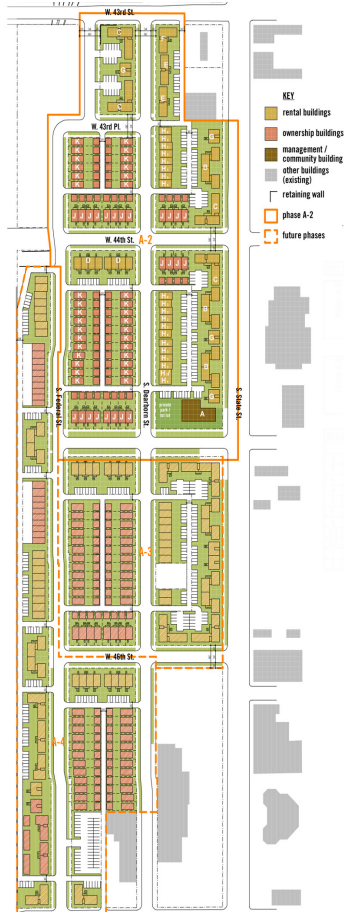
9-unit Building Elevation



Building type H3



Community Building



Site Plan

Savoy Square at Legends South

Chicago, IL

Client: Brinshore Development, LLC + The Michaels Development Company

Completed: 2010

The second phase of the Robert Taylor Hope VI Revitalization consists of 220 residential units and a community center on a site of approximately 15 acres. The site is located on the South Side of Chicago and is bounded by 43rd Street to the North, 45th Street to the South, State Street to the East and the Dan Ryan Expressway to the West. Landon Bone Baker Architects and Brook Architecture of Chicago are acting as the design team for this site.

This phase continues the planning format established in Legends South A1. The formerly isolated high-rises of the Robert Taylor Housing Project was replaced with a new site plan containing a variety of 2 and 3 story residential buildings that form the base for a new neighborhood. Traditional planning principles have been used as a model for the site plan. The new site plan incorporates new streets that reconnect the site to the existing city street grid. The size of the blocks were traditionally scaled for comfortable walking distances and cross-interaction between the blocks. The proposed density provides the neighborhood with a sense of public contact and vibrancy. Each block is designed as an individual element, and yet each block is also designed to relate to the whole site plan.

The site contains a mix of CHA rental units, affordable rental units and for-sale market-rate units providing for a variety of housing options on each block and throughout the development.

<https://www.landonbonebaker.com/work/legends-south/savoy-square/>



Community Building Interior

43 Green

Chicago, IL

Client: The Habitat Company
and P3 Markets

In-Progress

43 Green is a transit-oriented development (TOD) comprised of a multiphase, mixed-use, residential and commercial project anchored by the 43rd Street Green Line station at 43rd and Calumet. The combined development will directly invest over \$100 million in the historic Bronzeville neighborhood on the South Side of Chicago. The project is led by a joint venture between P3 Markets, a Bronzeville based development company, and The Habitat Company, a full-service developer and property management company with nearly 50 years of experience developing and managing residential and mixed-use projects in Chicago. 43 Green is planned as three mixed-use residential phases on the south side of 43rd Street, and a new office building on the north side of 43rd. All the buildings will include ground floor retail designed to activate 43rd Street and provide new services to residents who currently travel to Hyde Park for restaurants, groceries, and other services and household necessities.

Phase 1 of the development is a 99-unit residential building, 50% of the units will be affordable and 50% will be market rate. The area around the 43rd Street Green Line station is underserved for high quality apartment homes. Bronzeville has been a hub for Chicago's African American Community for over 100 years and many Chicago residents would be eager to live in Bronzeville if high-quality reasonably priced apartment homes were available. 43 Green will be marketed to young professional workers who commute downtown and to other locations around the region, and who feel connected to Bronzeville.

With the 43rd Street Green Line station as the community anchor, the project design intends to be similar in approach to TOD developments on the North side of Chicago. Like those developments 43 Green is designed with smaller, highly efficient apartments and reduced surface parking which lowers the cost of development. This ensures rents can remain affordable to tax-credit qualified renters, and middle income residents.

<https://www.landonbonebaker.com/work/43-green/>



Rendering of View From 43rd St Looking West



Entry View Rendering



Aerial Rendering From CTA Green Line

The Anchor at Mariners Inn

Detroit, MI

Client: Mariners Inn and Cinnaire Solutions

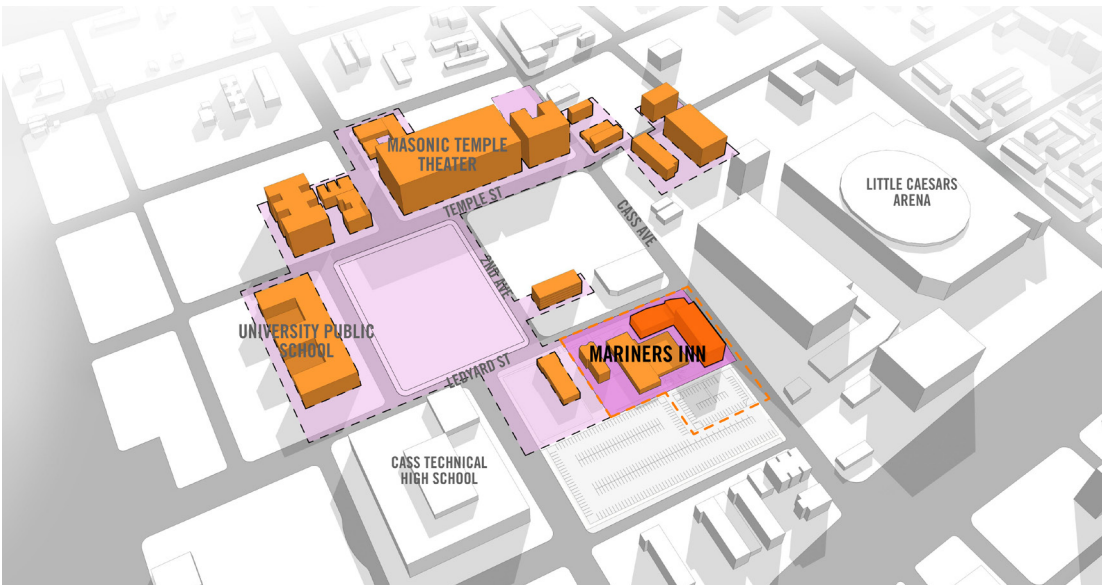
In-Progress

This new 4-story building and campus design will expand and optimize Mariners Inn's nationally acclaimed programming for alleviating the problems of homelessness and substance abuse. The building will include 44 units of permanent supportive housing and 40 units of recovery housing along with a vast range of community services.

The design for the ground floor takes advantage of Mariners Inn's home (since 1955) in the thriving Cass Park neighborhood just north of Detroit's city center. Many commercial storefront spaces and a social enterprise cafe line the thoroughfare of Cass Avenue. A 2-story glazed curtain wall and public lobby at the corner of Cass and Ledyard will connect Mariner Inn's programming to the larger surrounding community. The program also includes meeting and event spaces, case management, therapy and peer counseling, and several resident amenities. The resident amenities include multiple lounges, computer lab, art/making space, fitness room, and a private courtyard. The site design includes expanded parking that will serve residents and employees as well as provide an income stream for the organization when the local stadiums and arenas are in use. The courtyard and garden space that ties the new building with the existing structures include athletic/fitness spaces, meditative space, dining space, and play space for visiting families.



Rendering of Main Entry



Cass Park Historic District Scale/Massing



Interior Lobby Concept

Terrace 459 at Parkside of Old Town

Chicago, IL

Client: Holsten Real Estate Development Corporation

Completed: 2016

Led by Holsten Real Estate Development Corp. and the Local Advisory Council of Cabrini residents, Parkside of Old Town is part of the redevelopment of the former Cabrini Extension North. The plan includes approximately 18 acres on the city's Near North Side and will provide more than 700 homes on the ground of the infamous Cabrini Green housing project over several phases.

As a part of the Chicago Housing Authority's Plan for Transformation, Parkside of Old Town shifts the old public housing model to a mixed-income strategy. At places like Cabrini Green, people were cut off. Physically and psychologically, they were a city apart. The new apartment buildings aim to eliminate those barriers through lower-density development, greater income diversity among tenants, and amenities that attract residents across a broad range. Terrace 459 contains 36 units of replacement housing for former Cabrini residents, 27 affordable units, and 43 market-rate units. These rental apartments will be housed in a 94-unit, nine-story building with seven townhouses attached to the back and a 12-unit, three-story building which faces the townhouses. The mixed-income model intends to nurture a sense of community.

Awards

Richard H. Driehaus Foundation 3rd Place Award for Architectural Excellence in Community Design, 2017

Residential Architect Design Award: Affordable Housing Award, 2016

PCI All Precast Solution Award, 2016

PCI Multi-Family Award, 2016

AIA Chicago Distinguished Building Award, 2016

Real Estate Forum Best of Development Placemaker Award, 2016

<https://www.landonbonebaker.com/work/terrace-459-parkside-of-old-town/>

LANDON BONE BAKER ARCHITECTS 1625 W Carroll Ave Chicago IL 60612 www.landonbonebaker.com



Building 2: Street View



Aerial View of Project Site



Precast Concrete Construction



Courtyard



Building 11



Site Plan

Ruth Ellis Clairmount Center

Detroit, MI

Client: The Ruth Ellis Center

In-Progress

The Ruth Ellis Clairmount Center (REC Center) is a new construction in Detroit's Piety Hill neighborhood that will create 43 units of permanent supportive housing for homeless or at-risk LGBTQ youth within a larger mixed-use development offering social services, health care, and employment opportunities.

At approximately 44,000 SF, the building will offer 43 studio and one-bedroom apartments, with community amenities such as a resource library and technology center, community kitchen, salon, art studio, and on-site property management. The project will seek Section 8 project-based rental assistance from MSHDA for 34 units. Eight units will be unassisted, and there will be one employee unit. The market-rate units are intended to serve a permanent supportive housing population that no longer needs rental assistance but still requires residential supportive services. This allows for permanent supportive housing tenants to transition to units without rental assistance as they gain greater independence.

The REC Center will include a physical home for the Ruth Ellis Center, whose mission is to change nationwide systems of care for LGBTQ-identified youth. The Ruth Ellis Center will also create a Youth Entrepreneurial Center offering career training and professional development opportunities for youth in culinary arts, social services, and advocacy work related to their mission.

The Ruth Ellis Center and Henry Ford Health Systems will expand their partnership at a second Health and Wellness Center serving the public within the project. The approximately 3,000 SF clinic will include 4 exam rooms and 4 behavioral health consultation rooms, along with a small laboratory, and an exercise studio for yoga and movement-based therapies.

<https://www.landonbonebaker.com/work/ruth-ellis-clairmount-center/>

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Corner Rendering



Ground Floor and Site Plan



Main Entry Rendering

Alternative for Girls

Detroit, MI

Client: Full Circle Communities

In-Progress

This project is the development of a 1-acre vacant parcel in Northwest Detroit into 45 units of supportive housing and a ground floor Early Childhood Education space. The new 3-story building will provide permanent housing and on-site counseling and support to homeless or at-risk young women and mothers, and their children. The childcare space will serve residents of the building along with the greater community, and will include a private outdoor play space. Other resident amenities include a shared community room, activity room, computer lab, and outdoor patio space.



Rendering of Main Entry



Rendering of Play Space



Rendering of Southeast Corner

Raymond E. Shepherd House

Ferndale, MI
In-Progress

Raymond E. Shepherd House is a proposed new 4-story building which will provide 53 units of much needed affordable senior housing in Ferndale, MI. The LGBTQ+ affirming housing will offer a safe, welcoming environment to a population who is likely to have experienced discrimination based on their identity. LGBTQ+ seniors are more likely to face poverty and homelessness, due to decades of employment segregation, marriage inequality, and housing discrimination.

The building also includes a community event space serving the broader Ferndale community, along with resident amenities including a computer lab, fitness room, and garden/patio space.



Rendering of Southwest Corner



Rendering of Main Entry



Site Plan

Harvest Commons

Chicago, IL

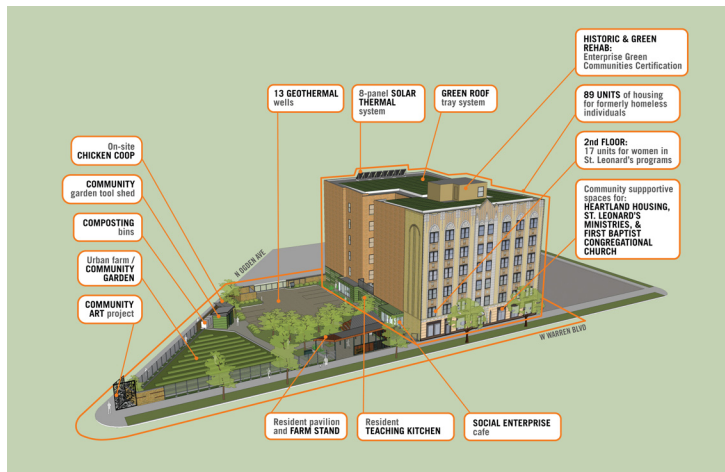
Client: Heartland Housing

Completed: 2013

Harvest Commons, formerly the Viceroy Hotel, is an 89-unit affordable residential and supportive services project. This historic and green rehabilitation was completed in 2013. The floors were reconfigured to reduce the number of units from 164 to 89, giving each unit an individual kitchen and bathroom. The project also includes extensive ground floor supportive services including an urban agriculture component, a teaching kitchen for residents to study growing food, nutrition, and food preparation. A resident operated public café is located on the ground floor facing the garden. Harvest Commons was partially funded by IHDA through the Low Income Housing Tax Credit.



Exterior View from Warren Blvd



Community + Green Features



Gracie's Cafe



Teaching Kitchen

The six-story, terra cotta and brick clad building is on the national historic register and has received an exterior façade restoration as well as preservation of interior features such as a historic lobby, front stairway, and barrel vaults on residential floors. The project includes green features such as geothermal heating and cooling, a solar-thermal domestic hot water system, and extensive native planting to mitigate storm water runoff.

While these major green features are exciting and effective, LBBA is just as excited by the less visible items that have a large impact on energy and water consumption. The project includes: super-insulation, advanced sealing techniques, energy efficient mechanical equipment and light fixtures, water efficient fixtures, and interior finishes that are both recycled and provide a healthy indoor air quality.

Awards

Richard H. Driehaus 1st Place Award for Architectural Excellence in Community Design, CNDA, 2014

Crombie Taylor Honor Award, AIA Illinois, 2014

Chicago Landmark Award for Preservation Excellence, City of Chicago, 2014

National Historic Preservation Advocacy Week, Preservation's Best of 2013

Distinguished Building Award, AIA Chicago, 2013

<https://www.landonbonebaker.com/work/harvest-commons-apartments/>



Community Garden



Urban Farm

City Gardens

Chicago, IL

Client: Brinshore Development LLC,
The Michaels Development Company

Completed: 2017

City Gardens is a full block, 76 unit mixed-income redevelopment designed with strong community collaboration to address those needs.

The design of the buildings has two considerations. The 3 exterior street fronts, suggest a strong shoulder to shoulder line up of buildings circling the interior court. The buildings are not soldiers lined up to keep everyone out, however the buildings do give containment to the interior of the block and make it a safe haven for the families who live there. This central core anchors the development and offers natural landscaping and shared space with environmentally-focused amenities such as community gardens, grill stations, a recycling center, shared play space, and a full teaching kitchen with ample gathering and cooking space inside the community building. The slow moving interior car traffic allows the entire courtyard to be a shared pedestrian space. The hope is the residents will take ownership of the "gardens" and use it as their own backyard where they grow, cook and eat healthy food. City Gardens is close to transportation, schools, and has a beautiful new city park directly to the north.

City Gardens uses sustainable landscape design practices such as native/adaptive plantings and an absence of any lawn grass, the use of bioswales between buildings and parking to remove pollution from runoff water, permeable pavers, a recycling center, and green roofs. With thermally-advanced building shells and Energy Star certified buildings, the project exceeds the City of Chicago's Green Housing Initiative requirement.

Awards
ULI Vision Award Project Category for Affordable Housing and Community Creation, 2019

CNDA Richard H. Driehaus Foundation Award for Architectural Excellence in Community Design, Co-winner, 2019

American Society of Landscape Architects Merit Award, Residential Design, 2018

<https://www.landonbonebaker.com/work/city-gardens/>



Main Entry



Outdoor Patio



Community Building Interior



North Facing Elevation



Window Bay Detail



- City Gardens Site Plan**
- 1 Building 1
 - 2 Building 2
 - 3 Building 3
 - 4 Building 4
 - 5 Building 5
 - 6 Building 6
 - 7 Building 7
 - 8 Building 8
 - 9 Recycling Center
 - 10 Grill Area
 - 11 Play Area

Site Map



Teen participants at ChiCAT Charrette



Brand New Beginnings Enterprise Planning Charrette



Claretian Associates 92nd Street Charrette



Claretian Associates 92nd Street Charrette



Brand New Beginnings Enterprise Planning Charrette



ChiCAT Charrette Participants

Community Engagement

Since its inception, LBBA's practice has been centered around relationships—cultivating existing partnerships and expanding to embrace more people in the process. Our holistic, tailored approach is informed by these decades of experience working in community-based projects and meeting the needs of these strong, evolving, and unique partnerships.

The work not only creates a sense of place and ownership for residents, but builds trust within the community and can improve the health and well-being of residents. In supportive housing projects in particular, these partnerships are increasingly valued because for the programs and services they can offer, such as teaching kitchens and job training.

We are experienced to lead, coordinate, collaborate, and assist in a multitude of various partnership types, engagement, and outreach efforts, from town halls and community charrettes to the co-creation of art and installation with residents. LBBA's experience is that strong collaboration can act as a catalyst for more viable, dynamic communities and increases social sustainability of the building and neighborhood.

Community Partner:



WOLVERINE BUILDING GROUP



MULTI-UNIT RESIDENTIAL



Wolverine Building Group is nationally recognized as a premier multi-unit residential builder. Our projects include a wide variety of multi-unit residential buildings including market rate apartments, historical renovations, student housing, affordable housing and senior living facilities, giving us a competitive advantage. Our experience covers every corner of multi-unit residential building. This project showcase features affordable housing and market rate projects similar in scope to proposed construction in the city of Ann Arbor at 121 East Catherine.



82 YEARS

of General Contracting services

59 YEARS

of Design Build services

29 YEARS

of Construction Management services

PRESIDENTS/OWNERS

Aaron Jonker
Curt Mulder

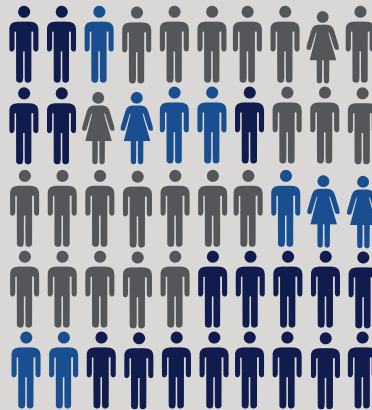
CFO

Tim Gabrielse

LEADERSHIP TEAM

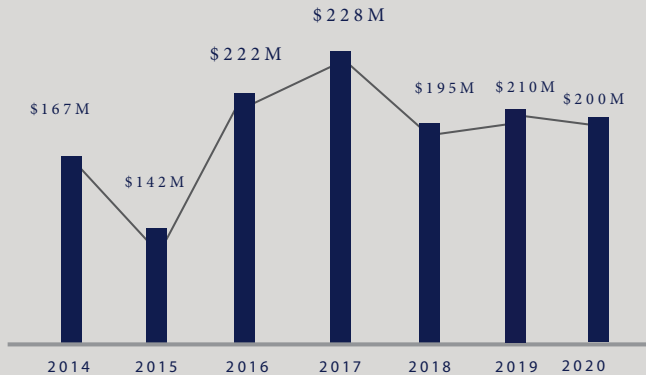
Aaron Jonker
Curt Mulder
Tim Gabrielse
Kim McLaughlin
Jamerson Ries

171 TEAM MEMBERS



- ACCOUNTANTS
- HUMAN RESOURCES
- PROJECT MANAGERS
- PROJECT ESTIMATORS
- PROJECT ENGINEERS
- BUSINESS DEVELOPMENT
- ARCHITECTS/CAD
- SUPERINTENDENTS
- FIELD MEMBERS
- SAFETY
- CARPENTERS
- STEEL ERECTORS
- PAINTERS
- PROJECT COORDINATORS

ANNUAL SALES



\$200,000,000

Bonding Capacity

S-CORP

incorporated in the state of Michigan

WOLVERINE BUILDING GROUP HEADQUARTERS

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Grand Rapids, MI 49512
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8273 Grand River #150
Brighton, MI 48114
Phone: 810.229.4320
Fax: 616.949.6211



WOLVGROUP.COM

WHY WOLVERINE

WE KNOW MULTI-UNIT CONSTRUCTION

We are proud of our extensive resume of work experience with multi-unit housing. Our portfolio includes projects across the spectrum of multi-family: from hotels to student housing, to retirement to micro-units. We will use our years of experience to leverage a positive construction experience for your team, vendors and the community.

Our teams in Brighton, Lansing and our headquarters in Grand Rapids, Michigan use their deep industry knowledge to create accurate estimates and well-timed construction schedules. Our clients consistently return for additional projects because our extensive pre-planning process adds significant value to complex construction projects.



ELEVATION APARTMENTS OKEMOS, MICHIGAN MARKET RATE



26 CHERRY GRAND RAPIDS, MICHIGAN AFFORDABLE HOUSING

118

WHAT WE OFFER:

- 82 Years of Experience
- Relationships with governmental agencies and authorities
- Experts in financing, regulations and housing tax credits
- Financial Strength and Stability

WHAT WE DELIVER:

- A team built on processes and procedures to fit your needs.
- Practices that incorporate innovative construction methods and cost containment concepts.
- Experienced professionals that incorporate lean construction principles to lower your costs and maximize productivity to bring projects in on time and within budget.
- Reduced construction time without sacrificing quality.
- Maintenance management programs for full cycle value.



VIC VILLAGE NORTH

Ann Arbor, Michigan

DELIVERY METHOD
GENERAL CONTRACTOR

PROJECT SCOPE
135,000 SQ FT

PROJECT OVERVIEW

Wolverine Building Group constructed the Vic Village North in downtown Ann Arbor, Michigan.

The project involved the new construction of a 135,000-square-foot, 12-story mixed-use building right next to the University of Michigan central campus. The first floor houses four commercial retail suites while the second through twelfth floors house 80 student housing units.

The project posed numerous logistical challenges to the project team given its urban environment. Project Managers scheduled construction around class schedules to protect pedestrian paths and elevate site safety. Additional manpower for the job was dedicated to an enhanced safety environment in order to accommodate neighboring businesses and student commutes.

95% of the facade was comprised of hand laid brick and cast stone. Our team engineered a process to install the brick through hydro-joist to reduce street and sidewalk closures. Working closely with the City of Ann Arbor, Wolverine navigated the complexity of this unique building site while concurrently completing the project on schedule for student move in day.

OWNER
HUGHES PROPERTIES



SUROESTE BRILLANTE APARTMENTS

Grand Rapids, Michigan

DELIVERY METHOD
CONSTRUCTION
MANAGEMENT

PROJECT SCOPE
40,500 SQ. FT.

PROJECT OVERVIEW

Wolverine Building Group constructed the Suroeste Brillante Apartments for Dwelling Place as part of the Plaza Roosevelt neighborhood in Grand Rapids, Michigan. Part of a shared effort among Habitat for Humanity, Dwelling Place, Mercy Health Saint Mary's, and Grand Rapids Public Schools, the Plaza Roosevelt development will expand economic opportunities, affordable housing, healthcare, and education for the community.

The Suroeste Brillante project involved the new construction of the 40,500 sq. ft. building with 24 two- and three-bedroom apartments. The building has community gathering space, garage parking with elevator access, and plaza greenspace in a smoke-free community.

This project carried the logistical challenge of coordinating with other construction projects. Habitat for Humanity and GRPS had active projects on adjacent sites that required additional communication and scheduling. Our team did extensive coordination with these other organizations to produce this asset to the Roosevelt neighborhood, leading to several volunteer opportunities with Habitat for Humanity and long-term volunteer projects with Grandville Avenue Center for the Arts & Humanities.

OWNER
DWELLING PLACE



CITY CLUB APARTMENTS



Detroit, MI

DELIVERY METHOD
GENERAL CONTRACTOR

PROJECT SCOPE
388,069 SQ FT

PROJECT OVERVIEW

Wolverine has completed construction on City Club Apartments in Detroit, Michigan's central business district. The project involved new construction of a mixed-use urban lifestyle living building with underground parking in an exciting and bustling area of the city. Construction on this 388,000 square foot, six-story mixed use building spanned three years. The building features retail space on the first floor with residential apartments and penthouses with unique floor plans on floors two through six. Tenants have the choice between 288 units; 45 penthouse units with rooftop terraces and a green roof, and 58 different unit types. Two levels of underground parking are included.

City Club amenities include a 20,000 square foot courtyard with plantings, astro-turf, fireplaces, water features and access to an indoor pool through overhead doors at the pool area.

The building is centrally located in downtown Detroit, MI. It has a concave face looking out over Grand Circus Park providing great views of the city. Tenants can also take advantage of its close proximity to nearby stadiums including Comerica Park.

OWNER
CITY CLUB APARTMENTS



205 SOUTH DIVISION AVENUE

Grand Rapids, Michigan

DELIVERY METHOD
GENERAL CONTRACTOR

PROJECT SCOPE
45,426 SQ.FT

PROJECT OVERVIEW

Wolverine Building Group constructed 205 South Division Avenue located at the corner of Cherry Street and Division Avenue in the Heartside district of Grand Rapids, Michigan.

The project involved the new construction of the seven-story mixed-use building featuring commercial and residential space, as well as the new construction of a parking garage. A total of 38 one- and two-bedroom apartment units are housed within the building. Each unit features modern kitchens complete with dark wood cabinets, quartz countertops, tile backsplashes, and stainless steel appliances. The units also feature polished concrete floors and a cool gray and blue color palette. The project was supported by MSHDA and HUD funding and the apartment accommodates low-income individuals. The building is Enterprise Certified Green to reduce overall lifecycle costs and environmental impact, and to provide a healthier environment for residents.

The mixed-use building is located on the corner of a very busy intersection near downtown Grand Rapids, Michigan. This caused some challenges with construction, as our team had limited room to work and had to take additional precautions to ensure the safety of surrounding apartment buildings and businesses. Our team was ultimately able to complete the project on time and on budget.

OWNER
BROOKSTONE CAPITAL



SKYVUE

East Lansing, Michigan

DELIVERY METHOD
GENERAL CONTRACTOR

PROJECT SCOPE
418,000 SQ FT

PROJECT OVERVIEW

Wolverine Building Group constructed SkyVue, a 418,00-square-foot mixed-use apartment building located in the heart of East Lansing, Michigan, near the campus of Michigan State University.

OWNER
EDR

The project involved the construction of a single nine-story building with 338 apartment units including one-bedroom, two-bedroom, and four-bedroom floor plans for a combined 824 beds. It also involved the construction of an eight-story, 202,000-square-foot precast parking deck containing 610 parking spaces, a state-of-the-art fitness center, a spacious computer lounge, a 50-person hot tub, fire pits and a courtyard.

This project became challenging when our superintendent passed away unexpectedly three quarters of the way through construction. He had the most knowledge of the project and was responsible for ensuring the daily progression of site work. Due to the size of the project, bringing on a new superintendent and getting them informed on all aspects of the project was unfeasible. Therefore, we brought on five superintendents, each with a specific project focus – one site superintendent, three interior superintendents, and one courtyard superintendent. This decision ensured the project was completed in a timeframe that resulted in a satisfied client.



SOUTHTOWN SQUARE

Grand Rapids, Michigan

DELIVERY METHOD
CONSTRUCTION
MANAGEMENT

PROJECT SCOPE
80,182 SQ FT

PROJECT OVERVIEW

Wolverine Building Group completed the Southtown Square project, which consisted of the scrape-and-rebuild of six townhomes and the new construction of a four-story mixed-use mid-rise with retail and apartment units. The townhomes and mid-rise house a combined 44 affordable apartment units.

The project was completed for LINC Community Revitalization as part of an initiative to make the Southtown neighborhood of Grand Rapids a better place to live. The living units are located within walking distance of a grocery store, a library, restaurants, parks, and other community spaces.

The facilities are LEED certified to improve quality of life for the residents, as well as to promote the long-term sustainability of the buildings and to reduce environmental impact.

OWNER
LINC COMMUNITY
REVITALIZATION





The Brix at Midtown is the largest wood framed building in the City of Grand Rapids

THE BRIX

Grand Rapids, MI

DELIVERY METHOD
CONSTRUCTION
MANAGEMENT

PROJECT SCOPE
325,000 SQUARE FEET

PROJECT OVERVIEW

Our multi-unit residential team recently completed the new construction of the Brix at Midtown, a market rate apartment complex located just outside of downtown Grand Rapids, Michigan. The \$41 million project took just 20 months to complete from groundbreaking to resident move in.

The project involved the demolition of 16 houses and commercial property prior to the new construction of two apartment buildings totaling 325,000 square feet. The buildings feature a combined 287 residential units with a mix of studio, one bedroom, two bedroom, and three bedroom options. Our team also constructed a five-story parking garage with 324 spaces for residents, as well as a fitness center, a leasing office and business center, a clubhouse, a heated pool, dog walk areas, and multiple courtyards.

This project was challenging due to an aggressive timeline for tenant move-in - Approximately 100 -150 workers were on the jobsite in a given day to ensure the buildings were turned over on schedule. Even with the large number of crew members working on the jobsite, our partnership with the Michigan Occupational Safety and Health Administration (MIOSHA) resulted in zero recordable safety violations during the duration of the project.

OWNER
RISE REAL ESTATE



HARRISON PARK APARTMENTS



Grand Rapids, Michigan

DELIVERY METHOD
CONSTRUCTION
MANAGEMENT

PROJECT SCOPE
69,000 SQ FT

PROJECT OVERVIEW

Wolverine Building Group completed the construction of Harrison Park Apartments, an affordable housing complex, on the northwest side of Grand Rapids, Michigan.

The project involved the demolition of a former automobile repair shop and two homes prior to the new construction of a 69,000-square-foot, four-story building. The complex is comprised of 45 units – 19 two-bedroom units and 26 three-bedroom units. It also has a shared community area complete with a kitchen, perfect for gatherings, and, a community garden and private parking lot are located directly behind the building, not visible from the street. The apartment complex gives priority to, and assists, families with children attending Harrison Park Elementary School, which is right next door. These children will benefit from the Grand Rapids Public Schools Challenge Scholars Program.

The soil on the jobsite was highly contaminated from the automobile shop that used to operate from the location - Much more so than our team original anticipated, since cleanup efforts had already taken place on the site by another company. This required our team to remove a tremendous amount of soil from the location and bring in fresh soil prior to the start of construction. In addition, our team worked through several harsh Michigan winters which caused setbacks with foundation and framing that impacted the overall project schedule. Despite these challenges, our team was able to make up for lost time and turn the building over to the client on schedule.

OWNER
DWELLING PLACE



Grand Rapids, Michigan

DELIVERY METHOD
GENERAL CONTRACTOR

PROJECT SCOPE
56,000 SQ FT

PROJECT OVERVIEW

Wolverine Building Group constructed Freyling Mendels, a 56,000-square-foot mixed-use development located in the heart of the Wealthy Theater Historic District in Grand Rapids, Michigan. The sustainable development occupies the block between Freyling Place and Caulkins Street, just north of Wealthy Street.

The project involved the new construction of six buildings to create a combined 44-units, including studio and one- and two-bedroom apartments. It features 22 floor plans with several amenities, including quartz countertops, stainless steel appliances, dishwashers, microwaves, in-unit washers and dryers, ample natural light, high ceilings, and outdoor patios. The most visible building, located directly on Wealthy Street, features 9,000 square feet of office, commercial, and restaurant space. It is home to the popular southern restaurant Forty Acres Soul Kitchen. This building also features a green roof and a live wall.

Construction on the development was challenging due to the dense urban site and surrounding residential neighborhood. Because of its location in the Wealthy Theater Historic District, historic standards were also enforced throughout the construction process.

OWNER
GREEN CANE PROPERTIES

MSHDA PROJECTS HISTORY

<i>PROJECT NAME</i>	<i>LOCATION</i>	<i>YEAR COMPLETED</i>
Grandview Apartments	Grand Rapids, MI	1978
Greenspire II	Portage, MI	1978
Lake Forest II	Shores, MI	1979
Greentree Apartments	Kentwood, MI	1980
Cedarway Apartments	Lansing, MI	1981
Baytown	Bay City, MI	1981
Kona Villa	Owosso, MI	1981
Camelot Woods II	Grand Rapids, MI	1981
Millcreek Meadows	Saranac, MI	1981
Miller Farms	Swartz Creek, MI	1981
Greenspire III	Portage, MI	1981
Grange IV	Grand Rapids, MI	1982
Greenbriar Apartments	Holland, MI	1982
Pine Terrace	Kalamazoo, MI	1980
Richter Place	Rockford, MI	1981
Village Green	Portage, MI	1981
Miller Farms	Swartz Creek, MI	1981
Owosso F/E	Owosso, MI	1981
Greenspire III	Portage, MI	1981
White River Estates	Hesperia, MI	1983
Friendship Village	Litchfield, MI	1983
Woodview Elderly	Newaygo, MI	1983
Riverbend Elderly	Jenison, MI	1984
Sentinel Pointe	Cascade Township, MI	1986
Pine Creek Apartments	Holland, MI	1986
David's House	Wyoming, MI	1986
Bear Creek Villa	Clarksville, MI	1987
Richardson Mills Apartments	Belding, MI	1987
West Michigan Woods	Kalamazoo, MI	1989
Millpark Townhomes	Parchment, MI	1989
Millpark Townhomes II	Parchment, MI	1990
Hearthside Elderly	Portage, MI	1990
Villas of Charlemagne	Pennfield Township, MI	1990
Ionia Public Housing	Ionia, MI	1990
Hidden Creek Apartments	Grand Rapids, MI	1991
Valley View Apartments	Ionia, MI	1991
Hearthside Elderly II	Portage, MI	1992
Gladshire Townhomes	Kalamazoo, MI	1994

West Meadows	Ionia, MI	1990
Valley View II	Ionia, MI	1994
Rickman House	Kalamazoo, MI	1994
Herkimer Apartments	Grand Rapids, MI	1995
Stonebrook Apartments	Grand Rapids, MI	1994
Spring Manor	Portage, MI	1995
Marsh Pointe	Haslett, MI	1997
Country View Apartments	Delton, MI	1998
The Meadows Apartments	Battle Creek, MI	1999
Genesis East Apartments	Grand Rapids, MI	2000
Genesis Bridge Street Mixed-Use	Grand Rapids, MI	2000
Faith Village Elderly	Benton Harbor, MI	2002
Nisbett/Fairman Residencies	Big Rapids, MI	2003
Emerald Park Residencies, Ph. I	Otsego, MI	2006
Emerald Creek, Ph. II	Grand Rapids, MI	2005
Emerald Park II (Senior)	Otsego, MI	2005
Delhi Stratgord Apartments	Holt, MI	2006
Azure Heights Apartments	Kalamazoo, MI	2005
Emerald Woods	Otsego, MI	2006
Armory Artswalk Lofts	Jackson, MI	2008
Park Meadows	South Haven, MI	2008
Gladys Street Apartments	Portage, MI	2009
Hawk's Ridge	Bath Township, MI	2009
Silver Star Apartments Ph. I	Battle Creek, MI	2009
Goodrich Apartments	Grand Rapids, MI	2010
Division Park Avenue	Grand Rapids, MI	2010
Windsong Apartments	Ann Arbor, MI	2011
Barnett Station	Shelby, MI	2011
Oak Meadows	Albion, MI	2011
Serrano Lofts	Grand Rapids, MI	2011
Allegan Senior Residence	Allegan, MI	2012
101 South Division	Grand Rapids, MI	2012
Cottage 36	Traverse City, MI	2012
Delaware Heights	Grand Rapids, MI	2013
Silver Star Ph. II	Battle Creek, MI	2013
Apple Blossom Apartments	Marquette, MI	2015
834 Lake Drive	Grand Rapids, MI	2014
Stuyvesant Apartments	Grand Rapids, MI	2014
Southtown Square	Grand Rapids, MI	2014
240 Ionia	Grand Rapids, MI	2014

New Village Park	Kalamazoo, MI	2014
Boardman Lake Apartments	Traverse City, MI	2015
LINC Family Homes	Grand Rapids, MI	2015
Brookside Commons	Traverse City, MI	2015
Bay Hill Apartments	Traverse City, MI	2015
205 South Division	Grand Rapids, MI	2015
26 Cherry	Grand Rapids, MI	2015
Parkway Meadows	Ann Arbor, MI	2016
Breton Village Green	Grand Rapids, MI	2016
Walled Lake Villas	Walled Lake, MI	2016
Elaine Building	Jackson, MI	2017
Wellington Apartments	Detroit, MI	2017
Gateway Village	Sturgis, MI	2017
Grandview Marquette	Marquette, MI	2017
Heather Gardens	Kalamazoo, MI	2017
Selinon Park	Portage, MI	2018
Harrison Park Apartments	Grand Rapids, MI	2018
Ashton Ridge	Jackson, MI	2018
Village of Kalamazoo	Kalamazoo, MI	2018
Pine Avenue Apartments	Grand Rapids, MI	2019
Roosevelt Park - Franklin	Grand Rapids, MI	2020
Roosevelt Park - Grandville	Grand Rapids, MI	2020
Emerald Flats	Grand Rapids, MI	2021

ABOUT WOLVERINE

Founded in 1939, Wolverine Building Group stands in the forefront of the construction industry providing quality building solutions through integrity, value and craftsmanship.

The unique blend of our specialized teams allow us to offer expertise in almost any segment of the construction industry. Our services include design build, construction management, general contracting and building services and maintenance. We offer our customers reliable and efficient building solutions, customized to meet their specific needs.

OUR PURPOSE

POSITIVELY IMPACTING PEOPLE AND COMMUNITIES

DOING GOOD AND DOING WELL

We seek to find the balance of simultaneously “doing good” in our community and contributing in meaningful ways, while also “doing well” in our business, delivering to our clients a high-quality product. We want our team to be proud of our company and the work that we do. We want this pride to come from our commitment to our community, the integrity by which we conduct our business and the quality of our work. We believe that this pride will directly contribute to the growth and prosperity of Wolverine which will allow us to share our success generously with the people and places we touch.

MASTER BUILDER

We aim to be the Master of Construction Delivery. Our goal is to be exceptional at understanding and exceeding our client’s expectations. We strive to be innovative in discovering and creating new best practices and building solutions. And we will attract, retain and develop a highly talented and dedicated team.

OPENNESS & TRUST

We aspire for a culture that embodies openness and trust. We believe this begins with a leadership team that is engaged with the entire company. A leadership team that understands how important changes will affect all areas of our organization and can be transparent with team members as to how decisions are made. We hope that throughout the organization, regardless of position, the practice of openness and trust will create an environment that breeds success.

PROACTIVE MARKET DEVELOPMENT

We look to aggressively pursue projects in response to market demand. Our talented team will be equipped to maintain and strengthen relationships with existing customers, identifying and responding to their future and present needs. We intend to improve our ability to proactively identify high-potential market development opportunities.

CORE VALUES

**DO THE
RIGHT THING
BE PASSIONATE
AND RELENTLESS
STRIVE FOR
GREATNESS
SEEK POSSIBILITIES
FIND SOLUTIONS
STEP UP
AND STEP IN
FILL THE VOID**



wolvgroup.com

NOVEMBER 24, 2021

MSHDA & MULTI-UNIT CONSTRUCTION

QUALIFICATIONS AND EXPERIENCE



TRAINING & EDUCATION

Bachelor's of Science, Civil Engineering
Calvin University

LEED Certified Professional
U.S. Green Building Council

EXPERIENCE

MULTI-UNIT RESIDENTIAL

240 Ionia (AH)

Grand Rapids, Michigan
105,000 SQ FT

205 Division Avenue (AH)

Grand Rapids, Michigan
50,088 SQ FT

26 Cherry Street (AH)
Grand Rapids, Michigan
48,883 SQ FT

Cottage 36 (AH)
Traverse City, Michigan
35,000 SQ FT

Southtown Square (AH)
Grand Rapids, Michigan
72,144 SQ FT

Silver Star Apartments Phase I (AH)
Battle Creek, Michigan

Silver Star Apartments Phase II (AH)
Battle Creek, Michigan
110,000 SQ FT

Barnett Station Village (AH)
Shelby, Michigan
37,000 SQ FT

Serrano Lofts (AH)
Grand Rapids, Michigan
16,000 SQ FT

Division Park Avenue (AH)
Grand Rapids, Michigan

47,000 SQ FT

Park Meadows Apartments (AH)
South Haven, Michigan
71,750 SQ FT

Loose Leaf Lofts (AH)
Grand Rapids, Michigan
33,000 SQ FT

834 Lake Drive
Grand Rapids, Michigan
51,000 SQ FT

Apple Blossom Apartments
Iron River, Michigan
42,530 SQ FT

Durant Hotel
Flint, Michigan
160,000 SQ FT

New Village Park (AH)
Kalamazoo, Michigan

101 South Division Lofts (AH)
Grand Rapids, Michigan

Standart Lofts
Toledo, Ohio

INDUSTRIAL/OFFICES

Smith Haughey Rice & Roegge
Grand Rapids, Michigan
26,600 SQ FT

Low Vision Clinic
Battle Creek, Michigan

AARON JONKER PRESIDENT & CO-OWNER

Aaron joined the Wolverine Building Group team in 2007. He brought with him extensive project management experience as a production and development director for a large home builder and developer. He has managed numerous complex historic renovations involving both State and Federal Tax Credit compliance, as well as LIHTC funding. He has also overseen some of Wolverine's most complex historic renovation projects, many of which won various awards.

Aaron now serves as President and co-owner of Wolverine Building Group. He leads a broad range of project teams and client relationships, contributing his creative talents and insight to assist clients in realizing their vision in creating practical and workable solutions.



<i>PROJECT NAME</i>	<i>LOCATION</i>	<i>YEAR COMPLETED</i>
Grandview Apartments	Grand Rapids, MI	1978
Greenspire II	Portage, MI	1978
Lake Forest II	Shores, MI	1979
Greentree Apartments	Kentwood, MI	1980
Cedarway Apartments	Lansing, MI	1981
Baytown	Bay City, MI	1981
Kona Villa	Owosso, MI	1981
Camelot Woods II	Grand Rapids, MI	1981
Millcreek Meadows	Saranac, MI	1981
Miller Farms	Swartz Creek, MI	1981
Greenspire III	Portage, MI	1981
Grange IV	Grand Rapids, MI	1982
Greenbriar Apartments	Holland, MI	1982
Pine Terrace	Kalamazoo, MI	1980
Richter Place	Rockford, MI	1981
Village Green	Portage, MI	1981
Miller Farms	Swartz Creek, MI	1981
Owosso F/E	Owosso, MI	1981
Greenspire III	Portage, MI	1981
White River Estates	Hesperia, MI	1983
Friendship Village	Litchfield, MI	1983
Woodview Elderly	Newaygo, MI	1983
Riverbend Elderly	Jenison, MI	1984
Sentinel Pointe	Cascade Township, MI	1986
Pine Creek Apartments	Holland, MI	1986
David's House	Wyoming, MI	1986
Bear Creek Villa	Clarksville, MI	1987
Richardson Mills Apartments	Belding, MI	1987
West Michigan Woods	Kalamazoo, MI	1989
Millpark Townhomes	Parchment, MI	1989
Millpark Townhomes II	Parchment, MI	1990
Hearthside Elderly	Portage, MI	1990
Villas of Charlemagne	Pennfield Township, MI	1990
Ionia Public Housing	Ionia, MI	1990
Hidden Creek Apartments	Grand Rapids, MI	1991
Valley View Apartments	Ionia, MI	1991



Hearthside Elderly II	Portage, MI	1992
Gladeshire Townhomes	Kalamazoo, MI	1994
West Meadows	Ionia, MI	1990
Valley View II	Ionia, MI	1994
Rickman House	Kalamazoo, MI	1994
Herkimer Apartments	Grand Rapids, MI	1995
Stonebrook Apartments	Grand Rapids, MI	1994
Spring Manor	Portage, MI	1995
Marsh Pointe	Haslett, MI	1997
Country View Apartments	Delton, MI	1998
The Meadows Apartments	Battle Creek, MI	1999
Genesis East Apartments	Grand Rapids, MI	2000
Genesis Bridge Street Mixed-Use	Grand Rapids, MI	2000
Faith Village Elderly	Benton Harbor, MI	2002
Nisbett/Fairman Residencies	Big Rapids, MI	2003
Emerald Park Residencies I	Otsego, MI	2006
Emerald Creek Ph. II	Grand Rapids, MI	2005
Emerald Park II (Senior)	Otsego, MI	2005
Delhi Stratford Apartments	Holt, MI	2006
Azure Heights Apartments	Kalamazoo, MI	2005
Emerald Woods	Otsego, MI	2006
Armory Artswalk Lofts	Jackson, MI	2008
Park Meadows	South Haven, MI	2008
Gladys Street Apartments	Portage, MI	2009
Hawk's Ridge	Bath Township, MI	2009
Silver Star Apartments Ph. I	Battle Creek, MI	2009
Goodrich Apartments	Grand Rapids, MI	2010
Division Park Avenue	Grand Rapids, MI	2010
Windsong Apartments	Ann Arbor, MI	2011
Barnett Station	Shelby, MI	2011
Oak Meadows	Albion, MI	2011
Serrano Lofts	Grand Rapids, MI	2011
Allegan Senior Residence	Allegan, MI	2012
101 South Division	Grand Rapids, MI	2012
Cottage 36	Traverse City, MI	2012

Delaware Heights	Grand Rapids, MI	2013
Silver Star Ph. II	Battle Creek, MI	2013
205 South Division	Grand Rapids, MI	2013
26 Cherry	Grand Rapids, MI	2013
Apple Blossom Apartments	Marquette, MI	2015
834 Lake Drive	Grand Rapids, MI	2014
Stuyvesant Apartments	Grand Rapids, MI	2014
New Village Park	Kalamazoo, MI	2014
Boardman Lake Apartments	Traverse City, MI	2015
LINC Family Homes	Grand Rapids, MI	2015
Brookside Commons	Traverse City, MI	2015
Bay Hill Apartments	Traverse City, MI	2015
Parkway Meadows	Ann Arbor, MI	2016
Breton Village Green	Grand Rapids, MI	2016
Walled Lake Villas	Walled Lake, MI	2016
Elaine Building	Jackson, MI	2017
Wellington Apartments	Detroit, MI	2017
Gateway Village	Sturgis, MI	2017
Grandview Marquette	Marquette, MI	2017
Heather Gardens	Kalamazoo, MI	2017
Selinon Park	Portage, MI	2018
Harrison Park Apartments	Grand Rapids, MI	2018
Ashton Ridge	Jackson, MI	2018
Village of Kalamazoo	Kalamazoo, MI	2018
Pine Avenue Apartments	Grand Rapids, MI	2019
Roosevelt Park - Franklin	Grand Rapids, MI	2020
Roosevelt Park - Grandville	Grand Rapids, MI	2020
Emerald Flats	Grand Rapids, MI	2021

Note: Highlighted projects were also supported by LIHTC financing.

COMMUNITY PROGRAMS & GRANTS

Wolverine Building Group has extensive experience completing projects that are supported by federal funding, community programs, or government grants. Some of our recent projects have been supported by the following funding sources:

- HUD Financing
- MSHDA Financing
- LIHTC Funding
- Brownfield Incentives
- Community Development Block Grants
- Historic Preservation Tax Credits

PROJECT GOALS & REQUIREMENTS

We are proud of our track record of meeting or exceeding the goals and requirements that are associated with these funding sources. Our recent projects have carried the following goals and requirements:

- Davis-Bacon & Related Acts
- Section 3 Participation
- Minority-Owned Business Enterprise Participation
- Women-Owned Business Enterprise Participation
- City of Detroit Executive Order Requirements

RECENT EVIDENCE

- **Harrison Park Apartments**, Grand Rapids, MI, Completed 2020

- M/W Workforce Goal: 21.25%; Achieved: 28.64%
- MBE Contracting Goal: 14.35%; Achieved: 21.3%
- WBE Contracting Goal: 5%; Achieved: 15.99%

- **Pine Avenue Apartments**, Grand Rapids, MI, Completed 2020

- M/W Workforce Goal: 21.25%; Achieved: 35.86%
- MBE Contracting Goal: 14.35%; Achieved: 22.48%
- WBE Contracting Goal: 5%; Achieved: 15.32%

- **Emerald Flats**, Grand Rapids, MI, Completed 2021

- M/W Workforce Goal: 14.35%; Achieved: 27.41%
- MBE Contracting Goal: 14.35%; Achieved: 12.7%
- WBE Contracting Goal: 5%; Achieved: 15.68%
- Section 3 Goal: 10%; Achieved 23.03%

NOTE: Additional statistics available upon request



STAFF QUALIFICATIONS & EXPERIENCE

Our team employs over a dozen LEED Accredited Professionals and has completed numerous LEED certified projects. For most of those projects, we completed the LEED documentation internally, with our own personnel overseeing the LEED submissions from start to finish. We have also had great success teaming with Catalyst Partners, who serve as contracted LEED administrators. Several of our recent LEED projects completed with Catalyst have exceeded our clients' initial goals for LEED certification, including the historic renovation of 502 - 2nd Street, which was received Platinum-level certification and garnered the highest total of points of any project ever under the former LEED 2.0 rating system.

Whether we complete our portion of the documentation in-house or team with Catalyst Partners, a successful outcome to the LEED certification process means achieving the desired certification level with minimal delays, appeals, or uncertainties in the process. Clearly defining expectations is the key.

At project start, we will specifically reference the credits being pursued in the scopes of work that we define for bidding subcontractors and suppliers. Bidders will know exactly what is required from them for every credit associated with their work. For many construction phase submittals we create our own templates specific to a project and we transfer the information as it becomes available into a broader spreadsheet which tracks overall credit compliance. If a credit has multiple options for compliance paths we document all possible options. This process translates easily into the LEED Template. This allows us to have the construction phase templates completed accurately within 30 days of substantial completion.

During pre-construction we work with the architect to determine feasibility of the owner's project requirements and the pursued credits. We provide insight into the pursuit of additional credits through innovation in design and/or exceptional performance. During construction, our superintendent will strictly enforce construction requirements. In the past we've forced violators of the Construction Waste Management policy to sort through construction waste and relocate it into the designated container. We've found this kind of enforcement very effective at eliminating repeat offenses. We've also learned that the superintendent has to be extra vigilant making sure the specified adhesives and sealants are being used.

Subcontractors and suppliers will be required to provide itemized material lists with their monthly bills so LEED documentation analysis can take place while the information is still fresh. Post-construction includes a verification process in which we check our spreadsheets against the LEED Template to ensure that we are in compliance with all pursued credits. We utilize retainage to incentivize subcontractors to get their final LEED documentation submitted. If the initial review results in a requirement for more information, it is vigorously pursued and resubmitted in a timely manner.

SUSTAINABLE CONSTRUCTION PRACTICES

Wolverine Building Group has extensive experience completing projects that carry goals for sustainability or “green” building practices. Some of our recent projects have been certified as follows:

- LEED Certification
- LEED for Homes
- Enterprise Green Communities
- Living Building Challenge
- SITES Certification

HIGHLIGHTS IN SUSTAINABILITY

Wolverine has been building “green” in West Michigan for decades. We are proud that, through innovative pre-construction planning, some of our projects have exceeded the original certification goals set by our clients. Some of the highlights of our sustainable multi-

Silver Star - A large, ground-up multi-unit project that provides affordable housing and extensive onsite resources to formerly homeless military veterans. This project is LEED certified.



101 South Division - A complex historic renovation project that transformed an 1870s-era three-story building into a stylish affordable multi-unit facility. This LEED Gold Level project garnered multiple awards.



Southtown Square Mid-Rise - A scrape-and-rebuild of six townhomes and the new construction of a four-story mixed-use mid-rise with retail and apartment units. The facilities are LEED certified.



The Wellington - A historic rehabilitation project in downtown Detroit, converting an existing 10-story building into 91 affordable housing units. This project is Enterprise Green Communities certified.



LEED CERTIFICATION - PLATINUM LEVEL

- 502 - 2nd Street Office

LEED CERTIFICATION - GOLD LEVEL

- Helen DeVos Children's Hospital
- Division Park Avenue
- Serrano Lofts
- 101 South Division
- Calvin University Bunker Interpretive Center
- Cottage 36

LEED CERTIFICATION - SILVER LEVEL

- Mercy Health Saint Mary's Southwest Campus
- James H. Zumberge Hall Addition & Renovation
- New Village Park
- Silver Star Apartments, Phase II
- Family Fare Fuel Center
- Mercy Health Saint Mary's Hauenstein Center
- Goodrich Apartments
- Emerald Flats

LEED CERTIFICATION

- Allegan Senior Residence

LEED FOR HOMES

- Emerald Flats
- Suroeste Brillante
- Avenida Brillante
- Covenant House

ENTERPRISE GREEN COMMUNITIES

- Harrison Park Apartments
- Pine Avenue Apartments
- Selinon Park Apartments
- Summit Place
- The Wellington
- Grandview Marquette
- Heather Gardens
- Metea Court
- Gateway Village
-

SITES CERTIFICATION - GOLD LEVEL

- John Ball Zoo Meerkat Exhibit

INNOVATION & INGENUITY

We have completed many projects with complex jobsite logistics. Through extensive pre-construction planning, our team works to find innovative methods to turn these logistical challenges into value engineering opportunities. Some recent examples are below.

Harrison Park Apartments, Grand Rapids, MI

Challenge: Jobsite situated in urban area with heavy foot and vehicle traffic, adjacent to an elementary school.

Solution: We utilized a panelized framing technique. This method entails building individual wood-framed wall panels offsite and transporting the completed panels to the jobsite.

Result: Less construction traffic to and from the jobsite; a minimized carbon footprint; less waste; fewer dumpsters needed. Reduces money, time, and waste.



Residence Inn by Marriott, Grand Rapids, MI

Challenge: Jobsite situated in an extremely tight urban site with heavy foot and vehicle traffic.

Solution: The client originally planned to use a tower crane for this pre-cast concrete hotel. Our project managers proposed alternate methods for the precast erection that did not require the use of a tower crane.

Result: Space that would have been utilized for the crane was used for construction and material laydown. We saved the cost of the crane as well.



Culver's, Fruitport, MI

Challenge: A prohibitive cost to tie into the water and sewer systems of this small rural community.

Solution: Our superintendent worked closely with local building officials to find a new route. By delving into civil documents and discussing multiple options, they were able to locate an alternate location for utility tie-ins.

Result: Tens of thousands of dollars saved before groundbreaking occurs.



DIVERSITY & INCLUSION - INTERNAL INITIATIVES

In 2018, Aaron Jonker and Curt Mulder became the fifth owners Wolverine Building Group. Aaron and Curt, both long-term Wolverine employees, share a vision for the company; it incorporates what is important to them as owners and leaders, and the role that they want our entire team to play in the community. This vision is our purpose: Positively Impacting People and Communities.

Wolverine is proud to be recognized as one of West Michigan’s foremost contractors. While we are big enough that we can work on large construction projects, we are also small enough that we can be intentional with our diversity and inclusion initiatives and supplier diversity programs.

Our passion for diversity and inclusion is led by our co-president, Aaron Jonker. He has served as co-chair for City of Grand Rapids’ Equitable Economic Development and Mobility Strategic Plan Steering Committee, and as co-chair for TALENT 2025’s Diversity and Inclusion Committee. He is passionate about diversity and is intentional in hiring diverse candidates to our leadership team.

Internally, Wolverine Building Group has established a Diversity, Equity, and Inclusion Committee. All members of our leadership team and other supervisors participate in a local program called Facing Racism, facilitated by the Institute for Healing Racism, a program of our Chamber of Commerce.

Our team’s diversity has grown through an intentional effort; we focus on attracting new candidates and retaining the diverse talent on our team. Through programs like “Transformational Leadership” with The Urban League, we partner with organizations developing new leaders of color in our community.

We’re adding cultural, social, and experiential diversity to our team, including recruiting veterans of the Armed Services. Our leadership team has also been focused on our internship program. Recently, our internship program hosted a Black female engineering student from Purdue University, who is now a full-time employee. Investing in this pipeline of diverse candidates has increased capacity, retention and staff perspectives.

While these accomplishments and initiatives may seem like small wins, we look at each win as a part of the bigger story of how we as a company are “Positively Impacting People and Communities.”

CASE STUDY: REPRESENTATION ONSITE



Disability Advocates

When we began pre-construction on a project for the Disability Advocates of Kent County, our client had one request: maximize participation of minority- and women-owned trade contractors. Currently, **53% of the subcontractors on this project are MBE and WBE companies.** We are proud to be part of a project that represents our diverse Grand Rapids community.

CASE STUDY: BUILDING RELATIONSHIPS



WBG serves as a mentor to Magnolia Outdoor Designs, an emerging MBE trade contractor. As part of the Construction Allies in Action program, we meet monthly with Magnolia’s owner to discuss topics like safety, accounting, and business development. This mentorship allows WBG team members to share knowledge while building a relationship with a skilled trade partner.

DIVERSITY & INCLUSION ON THE JOBSITE

Wolverine recognizes that minorities have long been underrepresented in construction. We must leverage our success to shape an inclusive future for our industry. We use the following methods to support MBE and WBE companies:

Building Relationships. Since 1980, Wolverine has built government-funded projects that carry goals for DBE participation. Through this work, we have established strong relationships with local DBE contractors.

“Meet the Contractor” Events. We hold onsite walk-throughs for larger projects to give local companies a chance to learn about bidding opportunities.

Advocacy Groups. We are actively involved with local organizations that support the development of MBEs, including the West Michigan Minority Contractors and our local Hispanic Chamber of Commerce.

Teaming. We promote teaming of emerging DBE subs with larger, established companies to provide opportunities for companies of all sizes.

Resource Assistance. In one recent instance, a MBE subcontractor didn’t have a line of credit large enough to purchase materials for a project, so we supplied the materials on the front end.

Mentoring. We support MBE subs offsite as well, assisting them with accounting or compliance paperwork. We also guide subs through MBE/WBE applications.

Our total Tier II spend on MBE and WBE companies has increased 200% since 2017. Wolverine is proud of this improvement and we view it not as an end in itself, but a step in the right direction.

COMMUNITY ENGAGEMENT

Our company’s purpose is to Positively Impact People and Communities. In 2018, our co-owners established the Wolverine Impact Fund to support:

1. Our employee donation matching program. Over 50% of our team participates in this program.
2. Mini-grants and other gifts to support organizations in our community.
3. Charitable requests from our partner organizations.

We value partnerships and have supported our client organizations in many different ways. Some of our favorite initiatives are shown below. We welcome an opportunity to discuss how our passion for community engagement can support your development projects.

CASE STUDY: COMMUNITY PARTNERSHIPS



As Wolverine worked on the **Lowell Showboat**, a community-funded space, we also supported the project’s Capital Campaign. We partnered with the Lowell Area Chamber of Commerce to develop an e-newsletter with updates to the community. Using the Wolverine Impact Fund, we supported a donation-matching program to get the Capital Campaign over the finish line.



WBG is working with the **Kent County Youth Fair** to redesign their fair grounds. Wolverine has supported the KCYF through sponsorships as well as purchasing 4-H animals at auction. We traditionally purchase a steer and a pig and donate the meat to the Community Food Club and Feeding America.



We also like to partner with client organizations in ways that allow our staff to get involved. We have sponsored many **Dwelling Place** events, and our team members donate and assemble gift baskets for the new residents of affordable housing apartments.

MACON ENGINEERING LLC



Company Overview

Macon Engineering LLC (formerly Perimeter Engineering LLC)

P.O. Box 314
Chelsea, MI 48118
Phone: (734) 216-9941

Office Location:
110 ½ West Middle Street
Chelsea, MI 48118

Primary Point of Contact: Kathy Keinath, P.E. 734-216-9941
Alternate Contact: James Michael 734-323-5694

Macon Engineering LLC is a Limited Liability Corporation registered and organized in the State of Michigan.

Macon Engineering LLC provides civil engineering, site planning, construction plans, contract administration, site inspections, utility and road designs, and engineering plan review. We are genuinely committed to delivering high quality services and recognize the importance of maintaining close communications with our clients. Our priority is to provide quality services that satisfy the needs of our clients in the most cost-effective and timely manner.

We are a local company and have been providing civil engineering, site planning and construction inspection services for approximately fifteen (15) years. The majority of our projects are located in Washtenaw County and primarily in the City of Ann Arbor. Our client base includes Avalon Housing, several various private developers, University of Michigan, and the City of Ann Arbor. Our projects include site planning and preparing construction documents for both commercial and residential developments.

The employees of Macon have numerous years of experience in the construction and civil engineering industries. Our comprehensive experience is the company's most valuable asset. Experience provides clients with effective approaches to implement a successful project and helps to facilitate coordination with contractors, sub-consultants and other agencies involved in projects. We believe that it is crucial to the success of any project to be staffed with competent, experienced and qualified personnel.

1500 Pauline Parkhurst Apartments, Ann Arbor, MI

This project consisted of the demolition of an existing apartment complex and the construction of new apartments with an improved layout that allowed for better accessibility, parking, storm water management and open space. The site was designed for an open area with a playground and community center surrounded by 1, 2 and 3 bedroom apartments and townhomes. The new layout required site planning and design of a rain garden, underground storm water management system, new public water main, significant grading, retaining walls, shared drives and landscaping. The work was coordinated with the City staff to minimize impacts to the adjacent City Park containing several landmark trees, steep slopes and woodland areas.



Status: 2011-2013
 Project Manager: Kathy Keinath, P.E.
 Client: Avalon Housing
 Client Contact: Wendy Carty-Saxon
 (734) 663-5858
 Zoned: R4B

Hilltop View Apartments, Dexter, MI

This project required rezoning of the existing parcel, and a special use approval to allow for multifamily residential in village commercial zoning. The project included the construction of four multifamily buildings and one additional building providing two residential units, a community center, service areas for the residents and a food pantry operated by Faith In Action. A total of 24 units will be provided on the site. The units will provide a mix of one bedroom flats, two bedroom flats and three bedroom flats and townhomes. The development has been planned to provide adequate parking, ingress and egress, storm water management facilities, pedestrian connections and all other required site elements. This project also required the construction of offsite public water main and storm sewer to serve the site.



Status: 2020 - 2022
 Project Manager: Kathy Keinath, P.E.
 Client: Avalon Housing
 Client Contact: Wendy Carty-Saxon
 (734) 663-5858
 Zoning: PUD

Hickory Way Apartments, Ann Arbor, MI

The development consisted of 70 multifamily residential units in two buildings each with three floors. The unit mix included one bedroom and two bedroom apartments and was planned to meet affordability standards. The building designs, with elevator access to upper floors, and common interior hallways, was intended to provide Avalon with options for accessibility and visitability that was not provided at their other properties. The development was planned to provide new public utilities, adequate parking, ingress and egress, storm water management facilities, pedestrian connections and all other required site elements.



Status: 2016 - 2021
Project Manager: Kathy Keinath, P.E.
Client: Avalon Housing
Client Contact: Wendy Carty-Saxon
(734) 663-5858
Zoning: R4B

The Grove at Veridian, Ann Arbor, MI

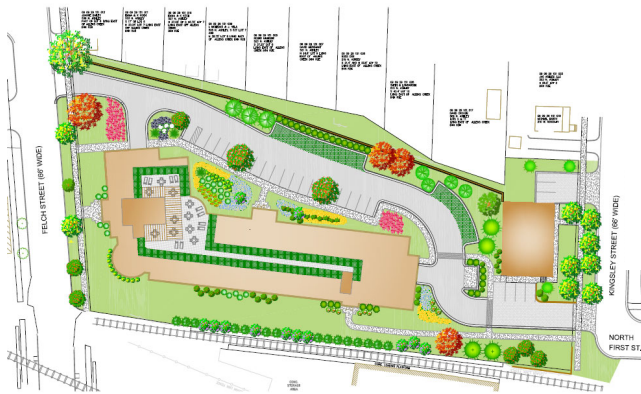
The Grove development will be multifamily residential project with 50 units located on a portion of the Washtenaw County Farm Park. The units will be located in nine buildings and a community center will also be located on the site. The units will consists of one, two, three and four bedroom apartments and townhomes. All units are planned to meet affordability standards. Eight (8) of the units will be designed to meet accessibility standards. The development has been planned to provide adequate parking, ingress and egress, storm water management facilities, pedestrian connections and all other required site elements. The project was approved by the City as a planned unit development to accommodate the unique features of the site including existing topography, orientation of buildings, pedestrian circulation, and preservation and protection of existing natural features on the site including a woodland area and several landmark trees. The site has been oriented to provide pedestrian movement by constructing a complete sidewalk network that connects not only the buildings to parking areas but also to open green space, a playground and preserved natural areas throughout the site. This site was designed in conjunction with Thrive Collaborative that owns the property to the south to create one harmonious, connected development.



Status: 2020 - 2022
Project Manager: Kathy Keinath, P.E.
Client: Avalon Housing
Client Contact: Wendy Carty-Saxon
(734) 663-5858
Zoning: PUD

Kingsley Condominiums, Ann Arbor, MI

We provided site planning and prepared construction documents for a 51 unit residential condominium development between Felch and West Kingsley Streets in Ann Arbor, Michigan. The project included below grade parking and 4 stories of residential units. We prepared drawings for storm water management system, grading, public water service improvements, site utility plans, soil erosion control plans and associated details. The project included establishment of a brownfield due to contamination at the site and removal of existing buildings over the Allen Drain. The site is located within the Allen Drain floodplain and required review and approval by the Michigan Department of Environmental Quality. The proposed plans included a comprehensive storm water management system that was reviewed by the Washtenaw County Water Resources Commissioner's office.



Status: 2017
Client: Kingsley Condominiums LLC
Contact: Fred Beal, JC Beal
Phone: (734) 665-7678
Zoned: R4D

121 Kingsley West, Ann Arbor, MI

This project included site planning and construction plans for a 22 unit residential condominium development at the intersection of Ashley and West Kingsley Streets in Ann Arbor, Michigan. The project included below grade parking and 4 stories of residential units. We prepared civil engineering drawings for storm water management system, grading, public water service improvements, site utility plans, soil erosion control plans and associated details. We also prepared asbuilt information of the storm water management system and certifications required by the City. The project was completed in 2016.



Status: 2016
Client: Huron Contracting
Contact: Tom Fitzsimmons
Phone: (734) 395-0470
Zoned: D2

First, Ann Arbor, MI

We provided site planning and prepared construction documents for a 25 unit residential condominium development on First Street in Ann Arbor, Michigan. The project included below grade parking and 4 stories of residential units. We prepared drawings for storm water management system, grading, site utility plans, soil erosion control plans and associated details. The project included construction of 250 feet of 12" public water main and new storm sewer in First Street that required reviews and approvals from the City of Ann Arbor. The proposed plans included a comprehensive storm water management system that was reviewed by the Washtenaw County Water Resources Commissioner's office. The site is located in the Allen Drain floodplain and required permitting with the Michigan Department of Environmental Quality. The project is currently under construction.



Status: 2017
Client: Huron Contracting
Contact: Tom Fitzsimmons
Phone: (734) 995-0470
Zoned: D2

The Mark, Ann Arbor, MI

We provided site planning and construction documents for a 7 unit condominium building on Liberty Street in Ann Arbor, Michigan. The project included preparing civil engineering drawings for storm water management system, grading, public water service improvements, site utility plans, soil erosion control plans and traffic control. This project included the construction of 500 feet of 8" public water main and cross connections at several intersections, transfer of water services, fire hydrants and repaving of Liberty Road. The project was completed in 2016.



Status: 2016
Client: Ann Arbor Builders
Contact: Alex de Parry
Phone: (734) 216-6600
Zoned: D2

544 Detroit Street, Ann Arbor, MI

This project is located at the intersection of Detroit and Division Streets overlooking the Broadway Bridge in Ann Arbor. We prepared the site plan and construction documents for submission to the City of Ann Arbor including all associated parking, utilities, landscaping and site furnishings. This project consisted of both office and residential use with covered parking. The site plan was submitted to the City as a planned project to allow for a reduction of setbacks due to the odd shape of the property.



Status: 2015
Project Manager: Kathy Keinath, P.E.
Client: Maven Development
Client Contact: Dan Williams
(734) 945-3603
Zoned: C1

Kingsley Parkside, Ann Arbor, MI

The project is located just east of the Kingsley and N First streets intersection and is part of the Kerrytown overlay district. The development included 3 residential units of about 1540 to 1890 square feet and enclosed lower level parking spaces for each unit. The units were condominiums and intended as owner-occupied residences. The development has been planned to provide adequate parking, ingress and egress, storm water management facilities, pedestrian connections and all other required site elements. The site is located within the Allen Drain floodplain and required review and approval by the Michigan Department of Environmental Quality.



Status: 2018
Project Manager: Kathy Keinath, P.E.
Client: James & Werner, LLC
Client Contact: William Davis III
(734) 657-3474
Zoned: D2

309 Ashley, Ann Arbor, MI

The development program for the project was an urban residential condominium community catering to those that would like to live near the urban core. There will be two and three bedroom units the design incorporates outdoor space for each dwelling in the form of exterior balcony/patio spaces. Vertical access throughout the building, via both stairways and elevators, will be via the main entrance on N Ashley (as well as via the below grade parking level). The project included nineteen residential units ranging in size up to approximately 2,500 s.f. The development has been planned to provide adequate parking, ingress and egress, storm water management facilities, pedestrian connections and all other required site elements. The project included establishment of a brownfield due to contamination at the site.



Status: 2018-2021
Project Manager: Kathy Keinath, P.E.
Client: Huron Contracting
Client Contact: Tom Fitzsimmons
(734) 395-0470
Zoned: D2

330 Detroit St, Ann Arbor, MI

The development program for this project includes commercial space for possible retail or food services on the ground floor, and access to parking, storage and building services on the ground floor. Below grade parking will also be provided. The remaining floors will provide 14 residential condominiums. The development will achieve LEED gold certification and will be requesting establishment of a brownfield due to contamination at the site. The development has been planned to provide adequate parking, ingress and egress, storm water management facilities, pedestrian connections and all other required site elements.



Status: 2021
Project Manager: Kathy Keinath, P.E.
Client: MAVD
Client Contact: Greg Copp
(734) 255-9686
Zoned: D2

Project Team

Our project team for this proposal will primarily include two key professionals; Kathy Keinath, P.E. and James Michael. The resumes of the staff describe each individual's qualifications, experience and capabilities.

Kathy J. Keinath, P.E.

Kathy received her Bachelor's of Science Degree in Civil Engineering from Michigan Technological University and her Master's of Science Degree in Construction Management from Eastern Michigan University. She has over 30 years of experience in design and construction of private and public projects. Her responsibilities include serving as general manager of the company, project management, contract administration, site planning and design, and preparation of construction documents. She is registered as a Professional Engineer in Michigan.

Major Projects

- Hickory Way Apartments
- The Grove at Veridian
- Hilltop View Apartments
- Parkhurst 1500 Pauline Residential Development
- 330 Detroit Street
- 309 Ashley
- Kingsley Parkside
- Kingsley Condominiums
- 410 First Condominiums
- 544 Detroit St
- The Mark
- 121 Kingsley
- The Garnet
- University of Michigan Golf Practice Facility
- Maple Shoppes/Aldi Commercial Development
- Eastern Michigan University Mark Jefferson Science Center
- Huron Parkway/Fuller/Geddes Intersection
- Ann Arbor Saline/Eisenhower Parkway Intersection
- City of Ann Arbor Landfill Cell IV Closure
- Saline Area Schools Site Development
- Rogers City Bike Path
- State of Michigan - Ypsilanti Psychiatric Hospital Storm Water Management Plan
- US-12 Reconstruction and Streetscape Clinton, MI
- M-50 Reconstruction and Streetscape, Tecumseh, MI

Previous Employment Experience

Macon Engineering Kathy has owned and operated the company (Macon Engineering/Perimeter Engineering) since 2006. Her responsibilities include serving as general manager of the company, project management, estimating, preparing proposals, contract administration, site planning and design, and preparation of construction documents.

Atwell-Hicks	Project Manager with responsibilities including managing design team, preparing proposals, preparing project plans, client coordination, local agency coordination, overseeing project design, quality control and project financial management.
Beckett & Reader	Senior Associate with responsibilities including engineering oversight, proposal preparation, budgeting, client representation, preparation of bidding documents, permitting, cost estimating, scheduling, construction administration and overall project management.
City of Ann Arbor	Senior Project Engineer responsible for the project design, preparation of bid documents, cost estimating, establishment of assessment districts, preparation of Council resolutions, review of site plans and construction plans for residential and commercial developments, permitting, coordination, environmental projects, and construction management of public water mains, sanitary sewers, storm sewers and roadways.
Jones & Henry	Project Engineer responsible for the design and construction of wastewater collection and water distribution systems. Assisted with the design and construction of wastewater treatment plants and water treatment systems. Prepared cost estimates and bid documents. Prepared feasibility studies, general plans, rate studies, master plans, sludge management plans, operation and maintenance manuals. Coordinated projects with the OEPA and ODNR. Assisted small communities in obtaining grants and funding.

James R. Michael

Jim has over 40 years of experience as a technician and inspector for various municipal and private development projects. His experience includes onsite project management as well as supervising and managing survey crews, draftspersons, and technician/inspectors. Jim is also experienced with Federal and State funded projects utilizing the Michigan Department of Transportation's Field Book and Field Pad computer software. He is registered with the Michigan Department of Environmental Quality (MDEQ) as a Certified Storm Water Operator. Jim is also licensed as a Builder in the State of Michigan.

Major Projects

- City of Ann Arbor Construction Inspection Services
- Various Private Development Inspection Projects (includes new storm, sanitary, water and street construction)
- Broadway Wall Project (City of Ann Arbor's first MDOT Project in 1983)
- Annual Street Resurfacing Project (20-25 Streets)
- Depot Street 24-inch Storm Sewer (Main to Broadway Bridge)
- Stadium Boulevard Phases I & III (MDOT Road Reconstruction)
- Oakbrook (Earth Balancing, New Utilities & Road)
- South Maple Road Project (New Utilities & Concrete Road Construction)
- 24-inch North East Transmission Water Main
- Fuller Road Bridges Phases I & II (MDOT Projects)
- Huron Parkway Phase II (MDOT Road Reconstruction)
- Huron West Park Phase II, 24-inch Sanitary Sewer (Micro Tunneling Project)
- Evergreen Storm Sewer Project
- Huron Parkway Bridge Reconstruction (MDOT Project)

Previous Employment Experience

Macon Engineering	James has been an owner of the company (Macon Engineering/Perimeter Engineering) since 2006. His responsibilities include assisting with design, drafting, estimating, construction oversight and preparation of construction documents.
Perimeter, LLC	James was a founding partner of Perimeter. His responsibilities included supervising inspectors and field crews, estimating, review of construction documents, contract administration, design recommendations, site inspection, acquisition of materials and fieldwork.
City of Ann Arbor	James was employed by the City for over 18 years. He was responsible for all aspects of construction management on a variety of projects. His duties included inspection, preparing construction reports, coordination of onsite work, and verification of pay estimates, preparing plans, design and surveying. He was also responsible for managing approximately 20 other technicians, drafters and inspectors.
Atwell Hicks, Inc.	Responsibilities include managing survey crew, performing topographic surveys, construction staking, drafting, construction inspection, and preparing construction reports.

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Community-Based Sustainable Development

About the Elevate Team

Elevate is a mission-based organization dedicated to smarter energy use for all. Founded in 2000, Elevate works nationally with a team of 160 people located in CA, IL, MI, MO, OR, and WI. Our energy analysts, construction managers, and project managers provide affordable multifamily housing and non-profits with a suite of energy and water efficiency services to improve the overall operation and performance of their properties. We offer support throughout the entire energy and water upgrade process beginning with an analysis of current usage, an onsite assessment, project scope development, and integrated design assistance through construction oversight, quality assurance and quality control, green certification administration, and post-upgrade monitoring. To date, Elevate has been responsible for over \$73 million worth of energy efficiency upgrades made to over 66,000 residential units saving 9.7 million therms of gas and 34 million kWh of electricity. Elevate also works closely with municipalities on climate and energy planning, solar mapping, and street lighting retrofits and utilities on demand response programs. Lastly, with our expertise we are also expanding the clean energy economy workforce to be more inclusive, improving indoor air quality, mitigating lead in water, and helping the residential real estate industry value energy efficiency and solar upgrades. For more information:

www.elevatenp.org.

Founded in 1999, New Ecology, Inc., is an innovative, mission driven non-profit. We are nationally known for our community-focused work advancing sustainable practices, reducing fossil fuel use, creating clean energy, eliminating pollution, promoting resilient and enduring healthy environments in which to live, work, and thrive. Our core work is providing energy efficiency and green building services that cost-effectively improve the performance, health, and durability of buildings. Our clients are typically owners of multifamily housing, (with an emphasis on affordable housing) and community-based projects such as municipal, educational, and arts buildings. We have a deep expertise in providing certification coordination and verification services for projects pursuing LEED, Enterprise Green Communities, Passive House Institute US, ENERGY STAR®, and RESNET HERS Rater. We have served more than 140,000 units since our founding and have specifically certified dozens of Enterprise Green Communities and over 40 PHIUS projects nationally. For more information: www.newecology.org.

In 2012, Elevate partnered with New Ecology, Inc. to collectively expanded our affordable multifamily energy and water efficiency services to underserved markets throughout the Northeast, Mid-Atlantic, Midwest, and West. Our combined team includes industry-certified building analysts and project managers, who have extensive experience with advanced multifamily energy analysis, superior customer service, and attention to detail.



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Approach

Elevate, in partnership with New Ecology, Inc., will work closely with Avalon Housing's project team to achieve a minimum of Enterprise Green Communities Plus Certification under the 2020 Enterprise Green Communities Criteria. We will also evaluate whether achieving Passive House US Certification is viable and cost-effective. Our approach to the certification process is to provide a comprehensive suite of services that ensure the Enterprise Green Communities Plus and PHIUS standards applicable to the property are well understood by the project team and properly installed. Our integrated project team kick-off meeting and pre-build submission activities set the stage for comprehensively designing the building according to the Enterprise Green Communities Plus and PHIUS standards and for establishing an integrated design process. Our integrated design strategy seeks to balance best practices with project constraints while maximizing energy and water savings and the integration of renewable energy. Our onsite activities, including construction inspections and rater services, will ensure that the "green" upgrades are correctly installed. Lastly, our project close-out activities, including development of resident and operations and maintenance manuals, setting up a mechanism to benchmark energy use on an on-going basis, and post-build submission will ensure the property receives a minimum of Enterprise Green Communities Plus Certification and reaches for PHIUS.



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Barbara Jean Wright Court Apartments

1354 S Morgan St.

Chicago, IL 60608



Barbara Jean Wright Courts is a 272-unit, low-rise, 40% family Section 8 community located at 1354 S Morgan Street, Chicago IL. The community was originally built in the 1970s in part because of the advocacy of Ms. Barbara Jean Wright.

Located in a gentrifying neighborhood between Little Italy and the Lower West Side, just north of Pilsen, and immediately adjacent to the University of Illinois Chicago main campus.

The 27 three and four-story brick structures, are located on an 11.5-acre site less than a 10-minute walk to the Orange Line.

The property received a LIHTC rehab in 1999 and is now into its extended use period.

This project will utilize City of Chicago-issued Tax-Exempt Bonds and 4% Low Income Housing Tax Credits. The property will immediately undergo approximately \$35MM of renovations which will include the replacement of kitchens, bathrooms, flooring, painting, HVAC systems, and boilers.

The capital plan also anticipates the new construction of a community building which will include multi-purpose rooms as well as offices for property management and resident services. This property will achieve Enterprise Green Communities 2020 Certification.



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Community-Based Sustainable Development

Finch Cambridge

675 Concord Ave

Cambridge, MA 02138



Finch Cambridge is an exciting, newly-constructed 98-unit affordable housing apartment building located in Cambridge, MA. It is owned by Homeowner's Rehab, Inc. (HRI), a non-profit owner and developer supporting diverse communities by developing and preserving affordable, high-quality housing. The team began the project with a lofty goal—design and construct a new, affordable housing development in Cambridge, that is both climate hazard resilient and meets the highest energy efficiency standard possible. Raising the bar even higher, HRI later decided to pursue full Passive House certification under the PHIUS+ 2015 rating system. In the end, the final project cost was only 1.4% above the original estimate for the non-Passive House design baseline, and represented a cost savings after rebates and incentives were factored in.



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NEW ECOLOGY

Community-Based Sustainable Development

Squirrelwood Apartments

261 Broadway

Cambridge, MA 02139



Squirrelwood is considered the fourth tightest multifamily building in the country and the tightest building on the East Coast (excluding duplexes). This result along with the other Passive House criteria, such as having the building super insulated, creates a more efficient building because it minimizes heat loss. It has achieved PHIUS Certification.

Funders include: 4% Low Income Housing Tax Credit (LIHTC), Tax Exempt Bonds, Permanent loan from MassHousing, DHCD (CBH, HSF, and CIPF), Cambridge Affordable Housing Trust, MassHousing Workforce Housing, State Historic Tax Credits, Cambridge Redevelopment Authority, Cambridge Historic Commission.

Awards:



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Henry Love

Henry Love is the Director of Midwest Market Development and Strategy at Elevate, a nonprofit organization that designs and implements programs for everyone to have access to clean and affordable heat, power, and water in their homes and communities. In this role, he works with partners across the Midwest to develop projects, programs and initiatives for equitable solutions to climate change that provide healthy, safe, and affordable homes for everyone.

Before joining Elevate, he served as Executive Director of the American Jobs Project, which he co-founded with current Secretary of Energy and former Michigan Governor, Jennifer Granholm.

He served as Assistant Director of Michigan Energy Options from 2009 to 2015 and has been an executive-level strategy consultant to nonprofit organizations in energy as well as local economic development and workforce development for disadvantaged communities. He has also developed programs for academic institutions, such as the University of California Berkeley and the University of Michigan. He also serves on the advisory board of Carbon180, which brings together scientists, policymakers, and businesses to fundamentally rethink carbon. In his spare time, he can be found enjoying the great outdoors, playing music or cooking great food with friends and family.

Education

B.A.A., Entrepreneurship and Finance, Central Michigan University, 2007

MBA, University of Phoenix, 2010



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Henry Love, MBA

Email: Henry.Love@ElevateNP.org

Phone: 517.899.5847

Professional Experience

Director of Midwest Market Development and Strategy

2019 – present

Elevate, Ann Arbor, MI

- Develop projects, programs and initiatives to realize “smarter energy use for all,” across the Midwest
- Focus on integration of energy efficiency, water efficiency, renewable energy, smart energy management, sustainable development, and finance with social and environmental justice
- Manage state-based teams of energy professionals, MBAs, and project managers
- Coordinate across matrix organization with engineering, policy, solar, communications, and research departments

Executive Consultant

2009 – 2019

Self-Employed

- Provide consulting on strategic planning, organizational design, and program development
- Developed operations and administration frameworks to ensure legal compliance and provide internal business intelligence, fraud prevention, and efficiency of operations
- Worked with a variety of nonprofits and entrepreneurs through contracts as well as board and advisory appointments
- Clients spanned: energy efficiency, renewable energy, carbon management, workforce development, community development, economic development, technology commercialization, public policy and academia

Executive Director

2014 – 2018

American Jobs Project, Berkeley, CA

- Founded organization with current Secretary of Energy and former Michigan Governor, Jennifer Granholm
- Published advanced energy economic development roadmap reports for 22 states, each in partnership with a top state-based university
- Produced measurable impacts, including: \$26.5M in direct public agency investment, 31 stakeholder led non-legislative actions, and 21 legislative actions with 12 policies signed into law as of 2018

Assistant Director

2009 – 2015

Michigan Energy Options, East Lansing, MI

- Conducted community energy study of the Mid-Michigan region (Clinton, Ingham, and Eaton counties), including a deep dive into the Michigan Ave. Corridor. Also created an accompanying GIS-based Community Energy Planning Tool.
- Developed and managed over 45 grants and contracts, totaling more than \$15M in funding over 6 years
- Led operations, finances, grant writing, program development and strategic planning

Education

- B.A.A., Entrepreneurship and Finance, Central Michigan University, 2007
- Masters of Business Administration, University of Phoenix, 2010



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Bill Lyons

Bill Lyons is a Technical Project Lead at Elevate, a nonprofit organization dedicated designing and implementing efficiency programs that lower costs, protect the environment, and ensure the benefits of energy efficiency reach those who need them most. In this role he supports a variety of projects with technical assistance and research. He also supports Elevate's solar programs with design and evaluation of photovoltaic systems. Bill supports building design projects with energy modeling as well as renewable and energy efficiency planning and implementing high-performance building technologies. Additionally, Bill conducts on-site energy assessments, recommends cost-effective upgrades to building owners, and assists these owners through the construction and financing of these upgrades.

Prior to joining Elevate, Bill taught high-school physics at Walter Payton College Prep, a Chicago public school and coached the Science Olympiad team there. He also lead students on international service projects to build houses in Equador and Guatemala in conjunction with Habitat for Humanity, International.

Bill also worked for Spire Solar Chicago designing and installing photovoltaic systems in and around Chicago. In this role, has installed ground mounted systems, roof mounted systems, ballasted pan systems, PV awnings, PV shade structures and Building Integrated PV.

Mr Lyons is a NABCEP Photovoltaic Associate™, a Certified Passive House Consultant, CPHC, a member of the Passive House Alliance U.S and the American Society of Heating, Refrigerating and Air-Conditioning Engineers.

Education

M.E.E, University of Illinois at Chicago, Chicago, IL

M.S.Ed, Loyola University, Chicago, IL

B.S.M.E., The University of Michigan, Ann Arbor, MI



Bill Lyons

Email: Bill.Lyons@ElevateNP.org

Phone: 773.269.2233

Professional Experience

Senior Engineer

2016 – present

Elevate, Chicago, IL

- Provides technical assistance on a variety of projects throughout Elevate
- Designs and evaluates Photovoltaic (PV) systems
- Creates whole building energy models in OpenStudio and other energy modeling software.
- Conducts on-site energy assessments in Illinois.
- Creates building energy reports by analyzing utility bills and modeling energy savings scenarios, identifying cost-effective energy efficiency upgrades.
- Assists building owners through retrofit and construction process by soliciting contractor bids, securing loans, rebates, and other funding, and providing technical consulting to building owners.

Science Teacher

2006 – 2015

Chicago Public Schools, Chicago, IL

- Developed and Implemented A.P. Physics B Course, Taught Honors and ARISE Physics
- Initiated the Science Olympiad team and coached the team through its development into state level competitions
- Lead three International Service Projects for students to build houses in Ecuador and Guatemala

Engineering Manager & Senior Engineer

2000 – 2006

Spire Solar Chicago, Chicago, IL

- Designed, permitted and installed grid tied, battery backed and standalone PV systems
- Commissioned PV arrays, inverters and interconnections
- Developed manufacturing processes to establish and maintain UL listing for modules and BIPV products

Education

- M.E.E. Energy Engineer , University of Illinois at Chicago, Chicago, IL, 2018
- M.S.Ed, Chemistry Education, Loyola University, Chicago, IL, 2013
- B.S, Mechanical Engineering, The University of Michigan, Ann Arbor, MI, 1991

Professional Credentials and Affiliations

- NABCEP Photovoltaic Associate™
- Passive House Alliance U.S.(PHAUS), CPHC
- American Society of Heating Refrigeration and Air-Conditioning Engineers (ASHRAE), member



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Angelina Benson-Glanz, PMP

Angelina Benson-Glanz is the Director of New Market Initiatives at Elevate, a nonprofit organization that designs and implements programs that reduce costs, protect people and the environment, and ensure the benefits of clean and efficient energy use reach those who need them most. In this role, she is leading Elevate's role in the design, development, and implementation of the Justice40 Accelerator for community organizations working at the frontlines of climate and environmental crises. She is also responsible for expanding Elevate's high-performance building services with affordable housing and nonprofits nationally, leading our effort to expand affordable multifamily energy efficiency programs in California, and supporting program growth in Oregon and the Midwest (Michigan, Missouri, and Wisconsin). She oversees business development and multifamily programs in California as well as engagements directly with affordable housing developers to integrate energy and water efficiency into new construction, rehabs, and on-going operations.

She brings a wide range of experience from her work at the City of Chicago Mayor's Office where she developed and managed strategic partnerships with utilities and non-profits to coordinate and target outreach, program delivery, and incentives in neighborhoods with high energy use. She also brings her experience in business strategy consulting for Marakon Associates where she conducted in-depth market analysis, developed financial models, and created and implemented sales processes, tools, and reports for Fortune 500 industrial firms.

Education

M.P.P., Public Policy, University of Chicago

B.S.E., Mechanical Engineering, University of Pennsylvania



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Angelina Benson-Glanz, PMP

Email: Angelina.Benson-Glanz@ElevateNP.org

Phone: 925.414.0283

Professional Experience

Director, New Market Initiatives **2016 – present**
Sr. Manager, New Market Initiatives **2016**
Manager, New Market Initiatives **2012 – 2015**
 Elevate, Chicago, IL

- Lead the development of multifamily energy and water efficiency programs in California and Oregon and support program growth in the Midwest with a focus on delivering benefits to underserved communities
- Oversee business development in California and Oregon and nationally for our high-performance building services, securing philanthropic grants and contracts with utilities, government agencies, and affordable housing developers
- Manage the market research process for each new geography; development of market entry strategies; program design, start-up, and on-going implementation; and, satellite office start-up and operations.
- Cultivate partnerships with aligned housing and energy organizations to support business development, program implementation, and policy changes to increase the impact and reach of programs

Policy Analyst, Innovation Delivery Team **2011 – 2012**
 City of Chicago, Office of Mayor Rahm Emanuel, Chicago, IL

- Engaged utilities, non-profits and engineering firms to offer commercial buildings committing to the Retrofit Chicago Initiative & U.S. DOE’s Better Buildings Challenge financial & technical support to reduce energy use
- Analyzed and mapped energy usage data to identify potential participants in the Retrofit Chicago Commercial Buildings Initiative and geographic zones to focus local residential energy efficiency efforts
- Developed and managed strategic partnerships with utilities and non-profits to coordinate and target outreach, program delivery and \$10+ million of incentives in neighborhoods with high energy use

Summer Consultant & Education Pioneers Graduate School Fellow **2010**
 Learning Point Associates, Chicago, IL

- Created and presented potential College Advising Service Line products and services to senior leadership to inform their market entry strategy rooted in detailed competitive analyses

Associate Consultant **2007 – 2009**
 Marakon Associates, Chicago, IL

- Worked with C-level executives at Fortune 500 industrial firms to develop and implement turnaround strategies based on in-depth financial models and market analysis
- Generated \$13 million in sales in 10 weeks for a \$5 billion industrial metals client by developing and implementing an outbound calling sales process, tools and reports

Education

- Master of Public Policy, University of Chicago
- B.S.E., Mechanical Engineering, University of Pennsylvania



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Maria Cecilia Quiñones Peña

Maria Cecilia Quiñones Peña is a Senior Project Manager on the National Strategic Engagement team at Elevate, a nonprofit organization dedicated to designing and implementing efficiency programs that lower costs, protect the environment, and ensure the benefits of energy efficiency reach those who need them most. In this role, Ms. Quiñones Peña provides tailored services to property owners, managers, and developers, to meet their high-performance property goals. Maria leverages her expertise to evaluate and support implementation of energy and water efficiency, renewables, resiliency solutions, electrification, and decarbonization.

To date, she has touched almost 400 properties representing almost 24 million square feet of space and 9,000 multifamily units. She also manages a data-driven studies analyzing the opportunity and challenges of implementing energy efficiency programs for affordable multifamily housing stock in Los Angeles, CA and in the state of Wisconsin. Additionally, Maria supports the Building Electrification Program, an innovative pilot working to electrify multifamily properties in the Midwest.

Before joining Elevate, Ms. Quiñones was a Commercial Sustainability Services Project Engineer at Southface Energy Institute, where she conducted energy and water assessments on small and large commercial buildings and provided energy efficiency implementation services and general sustainability consulting. She also led the original program design and implementation for Atlanta's largest commercial buildings benchmarking program, establishing a solid platform for the City's first energy benchmarking ordinance.

Education

M.S., Building Construction & Facility Management, Georgia Institute of Technology, Atlanta, GA

B.S., Civil Engineering, University of Illinois at Urbana-Champaign, Urbana-Champaign, IL



Maria Cecilia Quiñones Peña

Email: Maria.Quinones@ElevateNP.org

Phone: 773.906.5140

Professional Experience

Senior Project Manager

Project Manager

Project Lead

Elevate, Chicago, IL

2020 – Present

2018 – 2019

2015 – 2017

- Deliver high performance building consulting services to 24 million square feet of primarily residential space, specifically through energy, water, and waste benchmarking, building energy, water, and resiliency assessments, and green building certifications including ENERGY STAR® and Enterprise Community Partners
- Lead adaptation and launch of new service offerings such as net zero planning in new markets
- Engage national and local partners in collaborations on electrification, decarbonization, and equity
- Manage studies analyzing the opportunity and challenges of implementing energy efficiency programs for affordable multifamily housing stock in Los Angeles, CA and the state of Wisconsin

Commercial Sustainability Services Project Engineer

Southface Energy Institute, Atlanta, GA

2012 – 2015

- Instituted the original program design of the City of Atlanta’s Better Buildings Challenge, setting the platform the City’s first energy benchmarking ordinance
- Conducted ASHRAE Level I and II assessments on over 6 million square feet of commercial buildings
- Consulted with clients to select cost-effective solutions, solicit bids from qualified contractors to successfully implement projects, and obtain financing

Education

- M.S., Building Construction & Facility Management, Georgia Institute of Technology, Atlanta, GA, 2011
- B.S., Civil Engineering, University of Illinois at Urbana-Champaign, Urbana-Champaign, IL, 2010

Professional Certifications & Affiliations

- Member, Centering Equity in the Sustainable Building Sector, NAACP
- Faculty, Freedom University
- Executive Board, Society of Hispanic Professional Engineers

Publications & Presentations

- “Shaping Affordable Housing Communities of the Future.” M.C. Quiñones Peña, A. Benson-Glanz, L. Westmoreland, N. Young. New Gravity Housing Conference, August 2020.
- “What is Environmental Racism? Little Village’s Fight for Change.” M.C. Quiñones Peña, E. Corrado. Elevate Blog, June 2020.
- “Advancing a Green New Deal for Los Angeles Renters.” M. Stamas, M. Knab-Hasson, E. Tome, M. Quinones, D. Philbrick, A. Corso, A. Alexander, W. Wells, B. de la Cruz. Energy Efficiency For All. February 2020.
- “Elevator Maria Quiñones Named a 2019 Women’s Energy Summit Rising Star.” M. Quiñones. Elevate Blog, October 2019.
- “Toward Net Zero Water: Impacting Efforts from System Design to Policy Change and Behavior Modification.” M. Quiñones, B. Casamassima, C. Crosson, J. Cesare. Living Future unConference, April 2015.

ASHLEY WISSE, EIT, CEM, CPHC, LEED AP, Green Rater

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wisse@newecology.org 617-557-1700 x7043



SUMMARY

Ms. Wisse joined New Ecology, Inc. (NEI) in 2012. At NEI, she manages the greening of new construction and renovation projects, primarily in multi-family affordable housing. Ms. Wisse provides technical assistance to meet certification criteria for green building programs including numerous LEED rating systems, Enterprise Green Communities, and Energy Star; as well as securing applicable utility rebates for project owners and developers. Ms. Wisse also continues to research new technology and equipment to improve the intersection of construction and sustainability. During the 2016-2017 school year, Ms. Wisse also taught undergraduate courses in the Construction Management Department at the Wentworth Institute of Technology, located in Boston, MA. Ms. Wisse holds a Bachelor of Science degree in Civil Engineering from Syracuse University and a Master of Science degree in Architectural Engineering from The Pennsylvania State University.

EXPERIENCE

New Ecology, Inc.

October 2012–Present

Boston, MA

Senior Project Manager, Project Manager

Sustainability technical assistance consultant for high-performance, green affordable housing.

- LEED Accredited Professional and Green Rater
- Enterprise Green Communities, Energy Star Homes, and utility rebate coordination
- Integration of renewable and alternative energy
- Design assistance and construction oversight of sustainable, energy efficient, and high-performance new construction and major renovation

Wentworth Institute of Technology

September 2016 – May 2017

Boston, MA

Assistant Professor

- Assistant Professor in the department of construction management, courses taught include: Construction Graphics and Revit Modeling – lab and lecture, Materials Testing and Quality Control – lab and lecture, and Construction Surveying – lab and lecture.

Wiss, Janney, Elstner Associates, Inc

November 2010–September 2012

Boston, MA

Architectural Engineer

- Team Coordinator & Manager of Test Preparation and Execution for ASHRAE Whole-Building Air Tightness Testing
- Document Control & Construction Activity Observation of building upgrades and repairs
- Exterior envelope commissioning and peer review.
- Owner's representative for OPR compliance and local code requirements
- General research, proposal writing, budget estimation, site visit reporting, testing reports, creation and investigation of inspection openings, and infrared verification

ASHLEY WISSE, EIT, CEM, LEED AP, Green Rater

The Pennsylvania State University

University Park, PA

August 2008–August 2010

Graduate Research Assistant

- Researcher – Interviewed construction/design stakeholders and observed internal processes related ongoing construction; developed implementation strategies for campus-wide sustainable design goals and lean execution
- Co-researcher – Collaboration between the Green Building Alliance, Burt Hill, Inc., and the Lean & Green Research Initiative to understand phasing, decision-making, and key players within typical building projects to improve, lean, and increase sustainability within existing processes
- Residential Home Auditor – student teams visited volunteer area residents to review existing energy usage and provide possible improvements through long-and short-term investment strategies

EDUCATION AND TRAINING

The Pennsylvania State University, College of Engineering, State College, PA

2010

Master of Science – Architectural Engineering

Syracuse University, L.C. Smith College of Engineering and Computer Science, Syracuse, NY

2008

Bachelor of Science – Civil Engineering

CERTIFICATIONS

Association of Energy Engineers – Certified Energy Manager

National Council of Examiners for Engineering and Surveying (NCEES) – Engineer in Training (EIT)

Passive House Institute of the United States (PHIUS) – Certified Passive House Consultant (CPHC).

United States Department of Labor and Training, Occupational Safety and Health Administration – Ten hour Certified

United States Green Building Council – LEED Accredited Professional (AP) in the following rating systems: Building Design and Construction, Neighborhood Development, Interior Design and Construction, and Homes/Homes Midrise as well as Green Rater for LEED for Homes and Homes Midrise.

TECHNICAL PROFICIENCIES

AutoCAD Architecture, AutoCAD Revit, Google Sketch-Up, **Wärme Und Feuchte Imitational (WUFI)** Modeling, THERM Modeling, and PHIUS Modeling

PROFESSIONAL ASSOCIATIONS

ASHRAE – Member

Association of Energy Engineers (AEE) – Member

PHIUS – Member

USGBC - Member

CANstruction – Industry Mentor to Northeastern University team, 2011 and 2012

North East Sustainable Energy Association – Member

Young Professionals in Affordable Housing – Member

PUBLICATIONS

Thesis: Process-Based Policy Development for Sustainable Implementation on Pennsylvania State University Renewal Projects

ARTSPACE



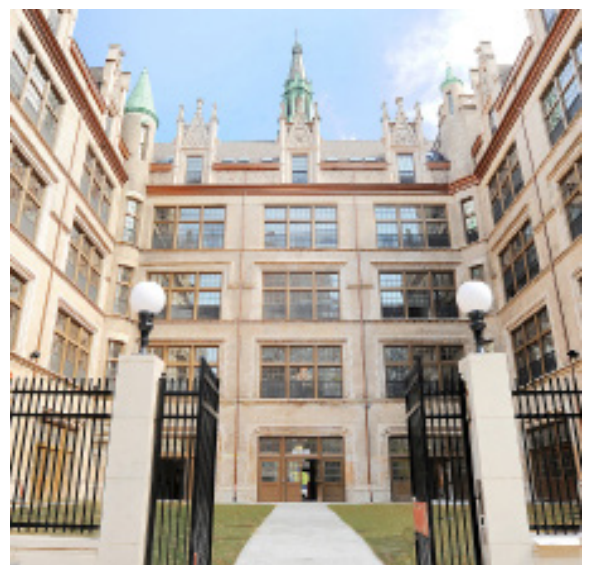
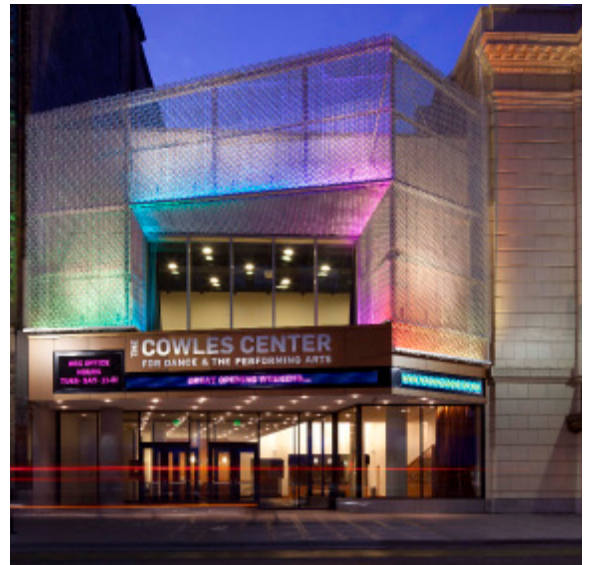
Artspace Experience

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Relevant Work Samples



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- PROJECT COST: \$52 MILLION
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- COMMERCIAL/COMMUNITY SPACE:
13,000 SF
- OPENED 2014

ARTIST PREFERENCE FREQUENTLY ASKED QUESTIONS



Q: Do you have to be an artist to live in an Artspace live/work project?

A: Anyone may apply for affordable housing in an Artspace project, but we give a preference for occupancy to those applicants who participate in and are committed to the arts. Applicants do not need to derive their income from their art. It is not uncommon for artists to work in another field to support themselves, their dependents, and their art form.

Q: How does the Artist Interview Committee (AIC) work?

A: The AIC interviews self-identified artist applicants and will ask standard questions about their commitment to the arts, and interest in living in an Artspace building. Applicants are given an opportunity to show their portfolio/examples of their work and ask any questions that they may have at that time. In the Artist Interview Committee meeting, the applicant must be prepared to demonstrate that they are actively engaged in an art form. The willingness and ability to contribute to a cooperative/creative environment and show a commitment to engage in the greater community will also be discussed.

Q: Does the AIC judge my work?

A: No. The AIC interviews applicants to determine their energy and passion for their art form; they do not judge the content or quality of an applicant's artistic work.

Q: How does Artspace determine who is an artist?

A: We define the term "artist" broadly to encompass a wide variety of creative pursuits. An Artist Interview Committee consisting of arts leaders in the local community along with Artspace representatives (and later residents once the building is leased) interviews all applicants. The committee looks for evidence that applicants are seriously committed to their art and that they will be mindful and positive contributors to the building and community. The application and qualification process does not include judgment of quality of work. An artist shall be defined as:

A person who works in or is skilled in any of the fine arts, including but not limited to painting, drawing, sculpture, book art, mixed-media and print-making.

- A person who creates imaginative works of aesthetic value, including but not limited to film video, digital media works, literature, costume design, photography, architecture and music composition.
- A person who creates functional art, including but not limited to jewelry, rugs, decorative screens and grates, furniture, pottery, toys and quilts.
- A performer, including but not limited to singers, musicians, dancers, actors and performance artists.
- A person involved in all culturally significant practices, including a culture bearer or practitioner, designer, technician, tattoo artist, hairdresser, chef/culinary artist, craftsperson, journalist, teacher or administrator who is dedicated to using their expertise within the community to support, promote, present, and/or teach and propagate their art form through events, activities, performances and classes.

Q: Are all art forms allowed in Artspace residences?

A: Artistic processes that are extremely noisy, do not comply with local zoning regulations or involve hazardous materials are typically not allowed to be practiced in your unit. All uses must comply with applicable code. For example, welding, woodworking using power tools, amplified band practice or glass blowing would not be allowed.



AMERICA'S LEADER IN ARTIST-LED COMMUNITY TRANSFORMATION

Artspace is a nonprofit organization that uses the tools of real estate development to create affordable places where artists can live and work. Artspace consistently develops these projects in ways that support stable, healthy communities, anchored in existing assets. Because Artspace owns each of the projects it develops, they are able to ensure that the spaces remain affordable and accessible to artists in perpetuity. With 50+ projects developed over the last three decades, Artspace has supported artist-led community transformation, representing a \$653 million investment in America's arts infrastructure. While embracing the value the arts bring to individual lives, Artspace has championed the once-radical idea that both artists living with financial hardship, and chronically underfunded arts organizations, can leverage fundamental social change. With headquarters in Minneapolis and offices in Denver, New York, Seattle, and Washington D.C., Artspace is America's leading developer of arts facilities; and has served as a consultant to hundreds of communities and arts organizations nationwide. www.artspace.org





Artspace is committed to attracting creative individuals and families from diverse artistic and cultural backgrounds. We encourage all people in the creative arts to apply regardless of race, color, religion, sex, disability, national origin, ethnicity, gender identity, marital status, familial status, sexual orientation, occupation or status with regard to public assistance, or physical, mental, or emotional disability. We are especially interested in individuals who are committed to building community and will give some of their time and energy toward this goal.

ARTIST INTERVIEW COMMITTEE

Anyone who qualifies for affordable housing may apply for residency in an Artspace project, but we give a preference for occupancy to those applicants who participate in and are committed to the arts. Applicants need not derive their income from their art. It is not uncommon for artists to work in another field to support themselves, their dependents, and their art form. The Artist Interview Committee (AIC) screens applicants to determine their participation in, and commitment to, the arts; they do not judge the content of an applicant's artistic work.

WHAT DOES THE AIC DO?

The AIC meets with pre-qualified applicants and their families, to determine their level of commitment to the arts, community and their art form. An interview is conducted and scored by interviewers. The AIC's average score determines whether or not an applicant receives the artist preference designation. The AIC does not attribute a score to the artist's body of work.

WHO MAKES UP THE AIC?

The committee members will initially be comprised of members of the local arts community, arts and neighborhood advocates and an owner representative. Once the building is leased and in operation, the Artist Interview Committee will expand to include residents in good standing.

WHAT DETERMINES AN ARTIST?

We define the term "artist" broadly to encompass a wide variety of creative pursuits. This does not mean that the art the artist creates generates any or all of the artist's source of income. An artist shall be defined as:

- A person who works in or is skilled in any of the fine arts, including but not limited to painting, drawing, sculpture, book art, mixed-media and print-making.
- A person who creates imaginative works of aesthetic value, including but not limited to film, video, digital media works, literature, costume design, photography, architecture and music composition.
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PLEASE NOTE:

Artistic processes that are extremely noisy, do not comply with local zoning regulations or involve hazardous materials are typically not allowed to be practiced on the premises.

DOES THE AIC JUDGE THE ARTISTS' WORK?

No. The AIC interviews applicants to determine their level of participation in and commitment to their artistic practice.



ARTIST INTERVIEW PROCESS

HOW ARE THE MEETINGS CONDUCTED?

The owner representative or designated moderator coordinates the interview, runs the meeting and acts as liaison to the property manager. Committee members are provided an Interview Form with a list of questions for the applicant. Applicants share their artwork and ask any questions that they may have.

INTERVIEW GUIDELINES

- Each interview committee is comprised of 3-5 members, including an owner representative.
- Residents serving on the interview committee must be in good standing (no violations of lease or operating policies); management will confirm good standing.
- Interview committee meetings are run by the owner representative or by the person designated by the owner representative.
- If any member of the committee does not adhere to the process or guidelines of the Artist Interview Committee, that member will no longer be allowed to serve on the committee.
- All interviews are confidential.
- Owner representatives participate to ensure objective evaluation of all processes concerning fair housing and other public program guidelines.

SCORING

- Answers to questions are scored, Interview Forms are collected and an average score is calculated.
- Our methodology provides an applicant with a score between 1 and 5. Applicants with an average score of 3 or higher are given an artist preference designation.
- Each household is given preference (or not) in whole. Only one member of a household needs to demonstrate a commitment as a practicing artist, in order to qualify for the artist preference designation.
- Households with an average score of less than 3 are placed on a non-artist list.
- Applicants who receive the artist preference designation are offered units prior to applicants who are on the non-artist list.

FAIR HOUSING

Our interview process does not violate fair housing law. Members of the AIC must undergo fair housing training prior to participating. Members of the AIC are limited to the questions on the Interview

Form. Clarification questions can be asked to help a member of the committee to better understand an answer that has been given. The questions on the Interview Form have been specifically chosen because they prompt answers that help committee members ascertain the artist and their family's commitment to their art form and their commitment to the community, without violating provisions of the Fair Housing Act.

Applicants may have questions for committee members. Questions pertaining to any of the protected classes of fair housing may not be addressed. Applicants will be referred to the property manager for further questions that they may have about the project or their application status. Although this process may seem formal, it is extremely important. We want to be sure that every applicant that comes before the artist interview committee be treated consistently and fairly.



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Wendy Holmes (Senior Vice President, Consulting & Strategic Partnerships, Artspace)

Wendy Holmes is curious about cities, and what makes them work well and equitably. She's lived in Minnesota since attending Macalester College, but her roots are on an Illinois farm, which is now an organic farm where her daughter goes to occasional "farm camp." Wendy has worked for the Walker Art Center, the Science Museum of Minnesota, Minnesota Public Radio, and her alma mater.

Ask Wendy what she does and she'll tell you that she and her team of five are "community whisperers." She is always on the go to new places—large and small—to help figure out puzzles that lead to equitable community development where creative people and organizations have a strong voice at the table.

Wendy has been active on local and national boards and advisory committees including James Sewell Ballet, the Urban Land Institute, Cantus, the Minneapolis Park Foundation, and the Merce Cunningham Dance Company. She has been a speaker at numerous national arts and urban affairs conferences, as well as a guest lecturer at the University of St. Thomas, Macalester College, and the Hubert H. Humphrey Institute of the University of Minnesota. Wendy is a national resource for information about what makes cities special and how artists and creatives are essential to healthy communities.



When she is not at Artspace, you will find Wendy biking, walking, singing, exploring new places and hanging out with creative people.

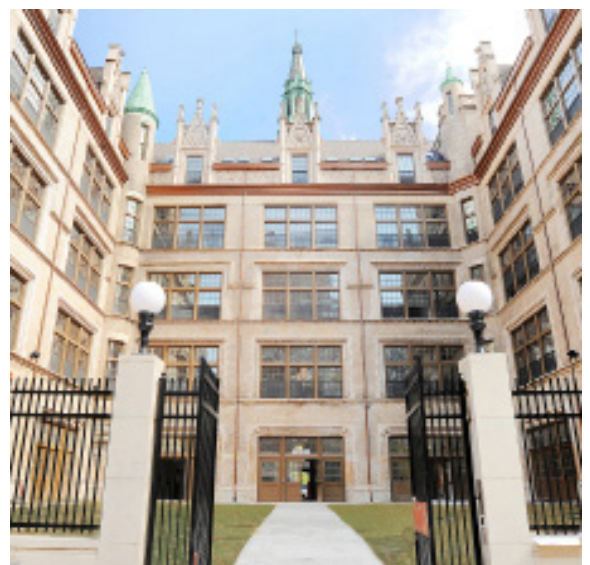
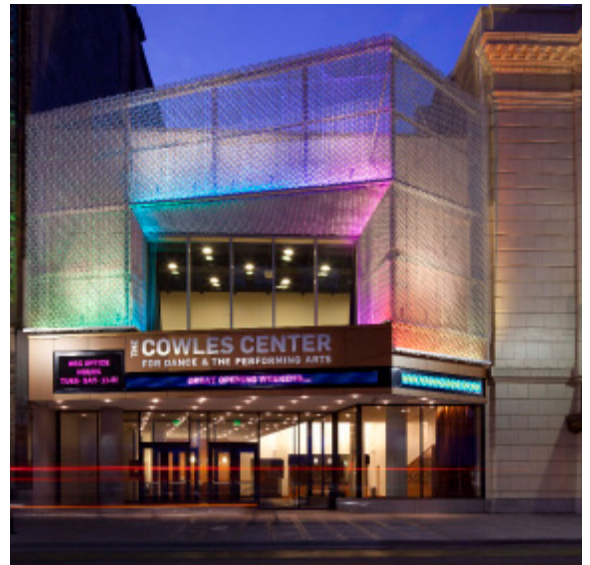
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LOOMIS, EWERT, PARSLEY, DAVIS, & GOTTING, P.C.





The firm has been recognized for the past three decades as premier counsel providing advices to clients in Michigan, Wisconsin, Illinois, Indiana, Minnesota, Delaware, Pennsylvania, and Maryland regarding various forms of financing for multifamily housing provided through the Michigan State Housing Development Authority (MSHDA), Wisconsin Housing and Economic Development Authority (WHEDA), Illinois Housing Development Authority (IHDA), Delaware State Housing Authority (DSHA), Minnesota Housing Finance Agency (MHFA), Maryland Department of Housing and Community Development (MDHCD), Pennsylvania Housing Finance Agency (PHFA), HUD, Farmers Home, Federal Home Loan Bank and conventional financing sources. The funding has included tax exempt, taxable and pass-through bonds, HOME funds, CDBG funds, AHP loans and other funds. It has worked extensively with subsidized loans under the Sections 8, 221(d)(4), 223(f), 236, 515, 538, 202, and 811 programs including the syndication and resyndication of such developments. It has acted as counsel to borrowers of more than \$2 billion in loan proceeds for affordable and conventional multifamily, congregate and assisted housing developments. It has also acted as counsel to Cinnaire Corporation in its investment in affordable housing throughout the States of Michigan, Indiana, Wisconsin, Illinois, Minnesota, Delaware, Pennsylvania and Maryland as well as for profit and nonprofit developers. It has been involved in the purchase or sale of more than \$300 million in low income housing tax credits. The firm has been active in the structuring of the purchase and sale of federal and state historic tax credits in connection with the rehabilitation of both multifamily housing developments as well as commercial structures. The firm has also been active in the preservation of affordable housing through 1031 exchanges.

Its services have included formation and structuring of limited partnerships and limited liability companies, preparation of syndication offering memoranda and related documents, drafting of various side agreements including development fee agreements, management agreements, guarantees, preparation of tax credit applications and rendering of advices and opinions with regard to sophisticated real estate and partnership tax issues, QAP matters, and 2530 issues. It has advised clients throughout the Midwest with regard to structuring of municipal ordinances dealing with payments in lieu of taxes (PILOTs) as permitted by state statute.

The firm has advised and represented clients in organizing and securing Section 501(c)(3) status from the Internal Revenue Service as providers of affordable housing, assisted clients in forming community development corporations and qualifying for CHDO status.

Attorneys have worked on the structuring of Section 8 and 236 preservation loans through MSHDA and HUD including refinancing with the use of HUD IRP programs. They have also been involved in reviewing and restructuring Section 8 funding with conventional funding including securitized loans.

The firm is actively involved in matters of environmental law, including Brownfield development, cleanup and liability determination matters.

It is also involved in the representation of multifamily management agents dealing with the structuring of management agreements for owners and agents and providing advice pertaining to compliance with leasing issues arising under the low income housing tax credit provisions of Section 42 the Federal Tax Code, the Federal Fair Housing Amendments Act and Americans with Disabilities Act and the Elliot Larsen Act in the State of Michigan.

The firm has an active practice before the Michigan Tax Tribunal, State Tax Commission and appellate courts involving local ad valorem taxation of multifamily housing including properties operated under the Sections 8, 236 and 515 programs. In that capacity, it has litigated and negotiated valuation, exemption, classification and capped value issues.

Our real estate services include the following:

AHP Loans; Low Income Housing Tax Credit Matters; Condominiums and Cooperatives; Syndications; Commercial Lending; Management Contracts; Construction Contracts; Nonprofit 501(c)(3) Qualification; Construction Loans; Pass-Through Bond Financing; Distressed Loan Workouts; Permanent Loans; Environmental Compliance; Payments in Lieu of Taxes (PILOTS); Federal, State and Local Tax Matters; Purchase and Sale of Improved and Unimproved Property; Federal and State Historic Tax Credit; Real Estate Development; Foreclosure; Real Estate Tax Appeals; HOME Program Financing; Tax Exempt Financing; Leasing; Title Review; Limited Partnership and Limited Liability Company Syndications; Zoning and Land Use



Attorneys:

TED S. ROZEBOOM

With an extensive knowledge of housing finance with an emphasis on low income housing tax credits, Ted S. Rozeboom brings experience in state and federal government to the Loomis Law Firm. His practice handles affordable housing developments, historic preservation, federal and state historic tax credits, community development and real estate tax exemption. Mr. Rozeboom has been a frequent speaker to various trade associations on affordable housing, community development and tax credit issues.

A graduate of George Mason University School of Law, Mr. Rozeboom spent more than 20 years with various state and federal agencies and committees including the Michigan State Housing Development Authority and the U. S. Senate Committee on Banking, Housing and Urban Affairs.

Mr. Rozeboom joined the Loomis Law Firm in 2006 and became a shareholder in 2008.

KEVIN J. RORAGEN

Kevin J. Roragen is a shareholder, past president and current executive committee member of the Loomis Law Firm. His practice focuses on commercial and real estate litigation, primarily in the areas of business, oil and gas, tax credit financing and affordable housing, municipal land use regulation and employment law. With more than 17 years of practice experience, Mr. Roragen has gained a depth of knowledge from representing businesses large and small, real estate developers, municipalities, professional athletes, charitable organizations and individuals in various legal matters. Mr. Roragen's broad experience has given him a sound understanding of his clients' concerns and needs, and how to best reach his clients' goals through time and money saving means. He has been listed as one of the *Best Lawyers in America* since 2011 in the areas of commercial litigation and municipal law.

Mr. Roragen remains deeply involved with the Lansing Region. He is a member of the Lansing Regional Chamber of Commerce, is a frequent speaker on employment law issues, is the former assistant city attorney for Grand Ledge, Michigan, and is on the Board of Directors for the Lansing YMCA. He has also been a guest lecturer at Michigan State University College of Law as well as the Thomas M. Cooley Law School, where he earned his degree and is active in the Alumni Association.

DOMINIC R. RIOS

Dominic R. Rios is an attorney specializing real estate law with a focus on affordable housing, tax law, and business and corporate law. Mr. Rios has represented syndicators, lenders and developers in all aspects of affordable housing transactions utilizing low income housing tax credits pursuant to Section 42 of the internal Revenue Code. Mr. Rios is also experienced in alternative or supplemental sources of financing for affordable housing, including federal and state historic tax credits, HOME, AHP, tax-exempt bonds, and Rural Development programs, among others.

A member of the State Bar of Michigan, American Bar Association, and the Ingham County Bar Association, Mr. Rios graduated *cum laude* from the Thomas M. Cooley Law School, during which time he served as an extern for the Michigan Department of Licensing and Regulatory Affairs, Office of Regulatory Reinvention, where he worked to effect change to old and outdated regulatory constraints.

AMIA A. BANKS

Amia A. Banks is an associate attorney with a focus on affordable housing, estate planning, corporate law, and regulatory matters. Ms. Banks joined Loomis in the Spring of 2020, and is admitted to the State Bar of Michigan.

Ms. Banks graduated Magna Cum Laude from Western Michigan University Thomas M. Cooley Law School in 2020, where she was the Symposium Editor of the WMU Cooley Law Review, and a member of the Phillip C. Jessup International Moot Court team. Ms. Banks also participated in a Probate Court Visitorship and the Sixty Plus Estate Planning Clinic. While in attendance, she earned the Leadership Achievement Award, the WMU-Cooley Distinguished Student Award, 13 Certificates of Merit, the Dawn C. Beachnau Award, and the Black Law Student Association's Academic Excellence Award.

Ms. Banks attended the University of Michigan for her undergraduate education earning a Bachelor's Degree in Evolutionary Anthropology with a minor in Paleontology. Ms. Banks was born and raised in Lansing, and is proud to continue to live in Lansing with her husband Anthony.

Clifford G. Cooper

Clifford G. Cooper is an attorney specializing in business and corporate law, real estate law, including affordable housing, and intellectual property.

Mr. Cooper graduated Magna Cum Laude from Michigan State University College of Law where he was the Executive Editor on the Michigan State International Law Review. He is licensed to practice in Michigan.

Mr. Cooper worked for the Firm as a law clerk for over six months prior to becoming an associate.

Paralegals:

ALISON MASUR

Alison Masur has been with the Loomis Law Firm since 2013. She earned a Bachelor of Arts in Political Science from Michigan State University and a Post-Bachelors Paralegal Certificate through the ABA approved paralegal program at Lansing Community College.

JORDAN PERAKES

Jordan Perakes has been with the Loomis Law Firm since 2018. She earned a Bachelor of Arts in Criminal Justice from Limestone University and a Post-Bachelors Paralegal Certificate through the ABA approved paralegal program at Lansing Community College.

MICHELE FRAKER

Michele Fraker has been with the Loomis Law Firm since 2006. She earned an Associates in Business Administration from Lansing Community College.

TED S. ROZEBOOM

*1607 Moores River Drive
Lansing, Michigan 48910*

EMPLOYMENT

2006 – Present	Attorney/Shareholder Loomis, Ewert, Parsley, Davis & Gotting, P.C. Lansing, Michigan
1999 – 2006	General Counsel/Chief Underwriter Office of Legal Affairs Michigan State Housing Development Authority Lansing, MI
2002- 2007	Member Affordable Housing Advisory Committee Federal Home Loan Bank of Indianapolis Indianapolis, IN
1991 - 1999	Staff Attorney Office of Legal Affairs Michigan State Housing Development Authority Lansing, MI
1990-1991	Executive Director Michigan Housing Coordinating Council Lansing, MI
1984-1990	Counsel/Professional Staff Member U.S. Senate Committee on Banking, Housing, and Urban Affairs Subcommittee on Housing and Urban Development Washington, D.C.
1983-1984	Professional Staff Member U.S. Senate Committee on Labor and Human Resources Subcommittee on Labor Washington, D.C.
1982-1983	U.S. Senator Donald W. Riegle U.S. Senate Washington, D.C.

EDUCATION

George Mason University School of Law Juris Doctor, December 1988	Arlington, Virginia
Calvin College Bachelor of Arts, Political Science, August 1981	Grand Rapids, Michigan

ASSOCIATIONS

Chairman/Past President, Michigan Housing Counsel
Member, Michigan Bar Association
Member, American Bar Association
Past President, Calvin College Alumni Association

HIGHLIGHTS OF QUALIFICATIONS

- X Nearly thirty-five (35) years of experience in developing and interpreting federal and state housing and community development law, policies, and programs including, but not limited to, work with the U.S. Department of Housing and Urban Development; Rural Development; and the U.S. Department of Treasury.
- X President/Shareholder/Partner/Executive Committee Member of Loomis, Ewert, Parsley, Davis & Gotting, P.C.
- X President/Secretary of the Michigan Magnet Fund/Michigan Community Capital which allocates New Market Tax Credits within and on behalf of the State of Michigan in conjunction with Michigan Economic Development Corporation, Cinnaire and the Michigan State Housing Development Authority.
- X Chariman/Past President/Executive Committee Member of the Michigan Housing Council, the largest and oldest trade association of affordable housing providers in Michigan.
- X Extensive transaction/program experience with NSP 1, NSP 2, CDBG, HOME Program, HUD Replacement Housing Programs, HOPE VI, Section 108 Loans, Project-based Section 8 and Vouchers, OAHP, State Brownfield Credit, State Historic Credit, New Markets Tax Credit, the Low Income Housing Tax Credit and tax-exempt bonds.
- X Seven years senior management experience supervising the Michigan State Housing Development Authority's Office of Legal Affairs including Compliance and Low Income Housing Tax Credit program staff.
- X Eight years experience as a closing attorney for the Michigan State Housing Development Authority including the development and preparation of documents for multifamily housing development closings (taxable and tax exempt programs), workouts, sales, bond closings (pass-through program), and grant closings.
- X Developed regulatory agreements, mortgages, mortgage notes, and various contractual forms for use in the HOME Investment Partnerships Program as implemented by the Michigan State Housing Development Authority.
- X Conducted arbitration proceedings on behalf of the Michigan State Housing Development Authority to resolve disputes involving several Authority-aided, multifamily housing developments, the owners of the developments, and their management agent.
- X Incorporated the Michigan Capital Fund For Housing, dba Cinnaire in Lansing, Michigan; prepared and submitted the Fund's application to the IRS for tax exemption; and administered various Authority repayable grants to the Fund.
- X Assisted in the planning, development, and coordination of applications from local communities seeking HUD designation as federal enterprise or empowerment community.
- X Developed the Comprehensive Housing Affordability Strategy and Consolidated Plan for the State of Michigan.
- X Served as the Executive Director of the Michigan Housing Coordinating Council established by Governor Blanchard to coordinate the housing activities of administered by sixteen state agencies.
- X Assisted the research, development, and drafting of legislation concerning housing policy, real estate finance, and tax policy including H.R. 1278, the Financial Institutions Reform, Recovery, and Enforcement Act (FIRREA); H.R. 1, the Department of Housing and Urban Development Reform Act of 1989; S. 566, the National Affordable Housing Act; and the First Time Home Buyers Act.
- X Planned, developed and participated in Congressional hearings regarding HUD budget and HUD oversight.

- X Assisted the Special Counsel and Chairman of the HUD Investigation Subcommittee in the development of the Senate investigation into alleged mismanagement at the Department of Housing and Urban Development including the drafting of subpoenas, reviewing and deposing of potential witnesses, and preparing background materials and questions for subcommittee hearings.
- X Developed the first statewide directory of emergency shelters and emergency assistance for homeless individuals and families in the State of Michigan.
- X Worked with federally recognized Indian Tribes in Michigan on federal gaming legislation.
- X Drafted federal legislation on behalf of the Saginaw Chippewa Indian Tribe of Michigan to establish investment pool with land judgment funds.
- X Recognized by federal Indian tribes in Michigan for efforts to promote community and economic development.

IMEG



FIRM PROFILE

Organization

Desai/Nasr now IMEG – formerly Desai/Nasr Consulting Engineers, Inc. – and Jay Desai Consulting Engineers, Inc. – has been serving the Architectural industry since 1980.

Desai/Nasr now IMEG is one of the Detroit area’s largest structural engineering firms offering comprehensive structural engineering services including condition assessments, building code investigations, foundation systems, vibration analysis, special structural investigations, value engineering, structural analysis and design, failure investigations, equipment foundations, finite element analysis, shoring and bracing design, fabrication and erection studies, glass and glazing design, forensic engineering and expert witness testimony.

Design Philosophy

Our service and design philosophy is to utilize leading edge technology to develop the optimal design solutions for each project. We strive to provide innovative and cost-effective solutions for exceptional designs. The principals of the firm stay involved in each project from inception to completion to assure product quality through leadership, technical expertise, consciousness for budget and schedule and coordination with other disciplines.

Desai/Nasr now IMEG applies Building Information Modeling (BIM) to optimize design, increase coordination between design disciplines, increase contractor understanding of design requirements and reduce costly field modifications due to unforeseen conflicts between design disciplines requirements.

Our Team

17 Structural Engineers (11 Registered Professional Engineers)*
 4 AutoCAD / REVIT Drafters
 1 Administrative Professional
 *with access to an additional 200+ structural engineering staff within the IMEG organization

Our Clients

Architects
 Consulting Mechanical, Electrical and Civil Engineers
 General and Specialty Contractors
 Construction Managers
 Developers
 Facilities Management Groups
 Design/Build Teams
 Insurance Companies

Registrations

USA

Alabama, Arizona, Arkansas, Colorado, Connecticut, Delaware, Florida, Georgia, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maryland, Michigan, Missouri, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, South Carolina, Tennessee, Texas, Utah, Virginia, Wisconsin

And Worldwide

Contact Us

33533 W 12 Mile Road, Farmington Hills, MI 48331
 PH (248) 932-2010 FAX (248) 932-3088

Professional Services

- Condition Assessments
- Building Code Investigations
- Structural Analysis & Design
- Special Structural Investigations
- Structural Vibration Analysis
- Equipment Foundations
- Finite Element Analysis
- Shoring & Bracing Design
- Failure Investigations
- Value Engineering
- Fabrication & Erection Studies
- Forensic Engineering
- Expert Witness Testimony
- Due Diligence Studies
- Peer Review
- Restoration & Repairs
- Glass & Glazing

Project Types

- Office Buildings
- Healthcare Facilities
- Athletic & Recreational Facilities
- Colleges & Universities
- K-12 Educational Facilities
- Institutional Facilities
- Commercial Facilities
- Mixed Use
- Automotive & Industrial Facilities
- Hotels & Residences
- Conference Centers
- Museum and Exhibit Spaces
- Airport & Transportation Facilities
- Historical Renovations
- Retail
- Religious Facilities
- Parking Structures
- Special Structures
- Investigations & Condition Assessments

Athanacios Nasr, PHD, PE, SECB

MANAGING PRINCIPAL/PROJECT EXECUTIVE



Nasr is currently Managing Principal/Project Executive with Desai/Nasr now IMEG. Since 1974 he has been involved in Academia on a part time basis. University of Alexandria, Egypt (Instructor 1975-1980), Wayne State University, Detroit, MI (Instructor 1981-1986) University of Detroit, Detroit, MI (Adjunct Professor 1987-1989), University of Windsor, Windsor, Ontario, Canada (Post Doctor Fellow 1987-1989), Lawrence Tech University, Southfield, Michigan (Adjunct Professor 1992-2000) teaching graduate and undergraduate courses, including theory of structures, steel design, concrete design, foundation design, geotechnical engineering, surveying and engineering drafting.

Nasr's work experience includes geotechnical engineering, structural hydraulic construction engineering, special foundation design, noise and vibration control. Project types extend from office buildings, school and hospital buildings, hotels and convention centers, shopping centers, housing and educational facilities, religious facilities, sports and recreation facilities, to industrial complexes such as auto and semi-conductors facilities, as well as major renovations and structural investigations and legal expert witness. Personal responsibilities for the structural engineering projects extend from schematic phases, preparation of construction documents to construction phases and field supervision.

PROJECT HIGHLIGHTS

- Riverfront Towers, Detroit, MI, New 27-Story Towers Design & Const. Review
- The Balmoral, Birmingham, MI
- Atwater Lofts, Detroit, MI, Residential, Retail & Parking
- 200 River Place, River Place Lofts, Detroit, MI, Renovation/Adaptive Re-use
- Martin Street Condominiums, Birmingham, MI New Parking, Retail & Condos
- COTS Peterboro, Detroit, MI
- Lincoln Park Lofts, Lincoln Park, MI, Renovation
- Orleans Landing, Detroit, MI, Phase I
- 4244 Burroughs Lofts, Detroit, MI, Loft Conversion/Facade
- Amber Oak Town Houses, Royal Oak, MI
- Sedgebrook/Erickson Community Housing, Lincolnshire, IL
- Addison Apartments, Detroit, MI, Historical Renovation
- Woodhaven Retirement Community, Livonia, MI, 20,000 SF Addition
- Cherrywood Nursing & Living, 3 Michigan Locations, Renovations
- Medilodge of Novi, Novi, MI, Single-Story Assisted Living
- Medilodge of Rochester Hills, Rochester Hills, MI, 78,000 SF, Single-Story Assisted Living
- Durand Convalescent Center, Detroit, MI, Addition & Renovation

Experience

46 Total, 32 with IMEG

Education

University of Alexandria, Egypt, BSCE
University of Alexandria, Egypt, MS
Geotechnical Engineering
Wayne State University, Ph.D. Civil
Engineering

Registrations

Professional Engineer
Michigan (62010-30603)
Pennsylvania (PE074034)
Texas (99038)

Affiliations

ASCE
EICE

HOUSING

Project Experience List



Orleans Landing
Detroit, Michigan



Erickson Community Housing
Lincolnshire, Illinois



Moorings Pointe Condominiums
Grosse Pointe Farms, Michigan



Sam Wyly Conference Center &
Residence Hall
University of Michigan
Ann Arbor, Michigan



Woodward Hills Nursing Center
Bloomfield Hills, Michigan

Concord Townhomes
Detroit, Michigan

The Pearl Apartments
Birmingham, Michigan

Orleans Landing Phase I East Riverfront Redevelopment
(20) 3-4 Story Multi-Family Residential & Retail Buildings
Detroit, Michigan

Fox Run Village Retirement Community
Novi, Michigan

Sedgebrook -Erickson Community Housing
(14) 5 ½ to 8 ½ Story Residential Buildings, with (3) Community Buildings
Lincolnshire, Illinois

Windermere Park Senior Housing Renovations
Warren, Michigan

Selfridge Apartments - Selfridge Air National Guard
Clinton Township, Michigan

Moorings Pointe Condominiums
Grosse Pointe Farms, Michigan

Naperville Retirement Community
Naperville, Illinois

Mercy Services for the Aging
Various Locations, Michigan

Sam Wyly Conference Center & Residence Hall
School of Business Administration - University of Michigan
Ann Arbor, Michigan

University of Michigan – Flint - Student Housing
Flint, Michigan

Student Housing Phase I and Phase II - Wayne State University
Detroit, Michigan

Volunteers of America - Coventry Place - Addition
Redford, Michigan

Woodward Hills Nursing Center
Bloomfield Hills, Michigan

Detroit Events Center Residential Buildings D & E
Detroit, Michigan

Peterboro COTS
Detroit, Michigan

HOUSING

Project Experience List



Evergreen Nursing Center
Southfield, Michigan



Woodhaven Retirement Community
Livonia, Michigan



200 Riverplace / Riverplace Lofts
Detroit, Michigan



Westin Book Cadillac Hotel
Detroit, Michigan

Detroit Events Center Townhomes
Detroit, Michigan

Evergreen Nursing Center
Southfield, Michigan

MediLodge-Therapy Addition
Howell, Michigan

Cherrywood Nursing & Living Renovations
3 Michigan Locations

Durand Convalescent Center Addition & Renovation
Detroit, Michigan

Woodhaven Retirement Community
20,000 sq.ft. Addition
Livonia, Michigan

West Oaks Senior Care Renovation
Detroit, Michigan

Willy's Overland Lofts
Historical Renovation, Façade & Conversion
Detroit, Michigan

200 Riverplace/Riverplace Lofts
Conversion, Renovations & Historical Preservation
Detroit, Michigan

Addison Apartments Historical Renovation
Detroit, Michigan

Cass Apartments Historical Renovation
Detroit, Michigan

Cass Avenue/Leland Lofts
Renovation of Existing School Building to Residential Lofts
Detroit, Michigan

Cadillac Square Lofts
Detroit, Michigan

Westin Book Cadillac Hotel Historical Restoration & Renovation
Detroit, Michigan

Michigan Bell Building
Detroit, Michigan

Amber Oak Townhouses
3-Story Wood Construction Apartment Townhomes
Royal Oak, Michigan

HOUSING

Project Experience List



4224 Burroughs / Burroughs Lofts
Detroit, Michigan

4244 Burroughs
Façade Restoration and Loft Conversion
Detroit, Michigan

North Park Elderly Care
8-story residential
Detroit, Michigan

Davenport Apartments Renovation & Restoration
Detroit, Michigan



Eaton County Medical Care Facility
Charlotte, Michigan

Eaton County Medical Care Facility
Charlotte, Michigan

888 Apartments
Troy, Michigan

644 Charlotte Apartments
Renovation & Restoration
Detroit, Michigan

Bella Vista Apartments
Highland Park, Michigan

Zaragon Place – Lofts – Mixed Use
Ann Arbor, Michigan

Zaragon Place II – Lofts – Mixed Use
Ann Arbor, Michigan



Marquette County Medical Care Facility
Ishpeming, Michigan

Marquette County Medical Care Facility
Ishpeming, Michigan

Ingham County Medical Care Facility
Okemos, Michigan

Jackson County Medical Care Facility
Jackson, Michigan

Lapeer County Medical Care Facility
Lapeer, Michigan

Tuscola County Medical Care Facility
Caro, Michigan



Iosco County Medical Care Facility
East Tawas, Michigan

Iosco County Medical Care Facility
Tawas City, Michigan

Lincoln Park Lofts
Lincoln Park, Michigan

STRATEGIC ENERGY SOLUTIONS



At Strategic Energy Solutions, Inc. ® (SES), we have been delivering professional engineering consulting services to the architectural and construction industries since 1997. Our team of progressive professionals has a deep understanding of how a building consumes energy, and is dedicated to providing mechanical and electrical engineering solutions to clients, owners and end-users. Our strength and experience spans market sectors and involves both renovation and new construction.

A traditional MEP engineering firm with a passion for economically-sound and environmentally-responsible practices, we are industry leaders in practical and efficient energy systems. We stay ahead of the curve, and not only talk-the-talk, but also walk-the-walk. Our corporate office, a former brownfield industrial space, is the only building in Berkley to achieve LEED Gold Certification and Energy Star Certified. A geexchange HVAC system, designed and installed by SES, is one of the main features of our office, which also serves as a demonstration site for sustainable design technologies.

We have successfully completed more than two hundred multi-tenant residential projects across twelve states. Our experience covers over 12 million square feet, and results in over \$1.7 billion of construction.

Services Provided:

- Mechanical
- Electrical
- Plumbing
- Fire Protection
- Lighting Design
- Low Voltage/IT
- Geothermal
- Commissioning
- Energy Management
- Sustainable Design
- Energy Modeling
- Alternative Energy
- Facility Assessments
- Life Cycle Cost Analysis

MARKETS SERVED

-  MultiTenant Residential
-  Senior Living
-  Parking
-  Corporate
-  Higher Education
-  K12 Education
-  Government/Municipal
-  Healthcare
-  Hospitality
-  Retail/Food Service
-  Industrial
-  Historic
-  Sustainable/LEED



- City Modern, 200 Edmund | 36 units
- City Modern, 320 Edmund | 37 units
- City Modern, 124 Alfred | 52 units 🏠 ★ 🌱
- City Modern, 2660 John R | 30 units
- City Modern, 2665 Brush | 31 units
- City Modern, 440 Alfred | 87 units
- Metro Tower Apartments | 364 units
- Midtown Place | 362 units 🏠
- Town Residences | 312 units
- The Leland | 298 units
- Lafayette Park Apartments | 210 units ★
- Confidential MTR Development | 204 units 🏠
- Traverwood Apartments | 165 units 🌱
- Albert Kahn Building | 162 units
- The Preserve | 160 units 🏠
- Lofts of Merchants Row | 157 units
- 6565 Woodward | 150 units
- United Artist Building | 148 units 🏠
- The Strathmore | 129 units 🏠 🌱
- Broderick Tower | 124 units
- The Berdan | 115 units 🏠
- The Corner | 111 units
- David Whitney Hotel & Residences | 108 residential units & 125 hotel rooms
- Zaragon West | 99 units
- The Durant | 93 units 🏠
- Fort Industry Square | 92 units
- Mariners Inn | 84 units
- The Farwell | 82 units 🏠
- The Griswold | 80 units 🏠

MULTI-TENANT RESIDENTIAL

Select Experience



- Standart Lofts | 75 units
- The Plaza | 75 units
- Liberty Lofts | 68 units
- Garden Theater Apartments | 62 units 🏠
- The Auburn | 58 units 🏠
- Fort Shelby | 56 residential units & 200 hotel rooms 🏠
- Lofts at New Amsterdam | 56 units
- Ruth Ellis Center | 43 units 🏠🌱
- Graphic Arts Lofts | 40 units
- Research Lofts | 38 units
- Canfield Lofts | 35 units
- Studio 56 Flats | 34 units

- 🏠 Low-Income/Affordable Housing
- 🌱 Enterprise Green or National Green Building Standard
- ★ Energy Star

HISTORIC FUNDING LETTERS





Avalon Housing Historic Financing Letters of Interest/Award Letters

Please find attached the following Letters of Interest/Award letters from funders at other Avalon developments. These are sources that we used before and that we anticipate using or are exploring using at Catherine Street.

We have used most of the sources below multiple times in the past. We have only included one letter for each funding source here by way of example. The Development Team Resumes also include a listing from Avalon of the funding sources overall and at time of initial development of each of our sites. With our 30 years of housing development experience, we have been able to refinance a number of our properties, giving us yet additional experience with these funding sources:

- Low Income Housing Tax Credit Equity—Letter of Intent from National Equity Fund for The Grove at Veridian
- Low Income Housing Tax Credit Reservation—MSHDA for Hickory Way Apartments Phase II
- HOME Award—Washtenaw County for Hickory Way Phase II, Phase III and The Grove at Veridian
- HOME Award—MSHDA for Arbordale Apartments
- City Millage Award—City of Ann Arbor for The Grove at Veridian
- Downtown Development Authority (DDA) Funding—DDA Resolution providing funding for five Avalon properties
- Washtenaw County Brownfield funding--Grant Agreement for Environmental Assessment Funding at The Grove at Veridian
- Washtenaw County Brownfield funding—Grant Agreement for Local Brownfield Revolving Grant Fund (LBRF) at 206/210 N. Washington
- Community Development Block Grant funding—Washtenaw County Affordability Agreement excerpts for 1675/1677 Broadway
- Conventional Construction Loan—Old National Bank Commitment Letter for The Grove at Veridian
- Conventional Construction and Permanent Loan—Chelsea State Bank Commitment Letter for Hilltop View Apartments
- Federal Home Loan Bank—Approval Letter for Affordable Housing Program funds for Hilltop View Apartments
- MSHDA Permanent Loans—Regulatory Agreement excerpts from MSHDA for MSHDA Taxable Loan, MSHDA Preservation Loan and MSHDA HOME Funds for Arbordale Apartments



- CDFI Permanent Loan—Delivery Assurance Certificate from Capital Fund Services for Pear Street Apartments

September 15, 2021

Wendy Carty-Saxon
Avalon Housing
1327 Jones Drive
Ann Arbor, Michigan 48105

RE: Veridian at County Farm North
Ann Arbor, MI

Dear Ms. Carty-Saxon:

We are pleased to present the following summary terms for an equity investment in Veridian at County Farm North which will own and operate a 50-unit low income housing project to be known as Veridian in Ann Arbor, MI. This summary of terms is based on the information we have received and is further based on certain assumptions made by NEF regarding the development budget, lease-up schedule, pro-forma operating statements, and ownership structure.

Investment Entity:	A to-be-formed Limited Partnership (the "Partnership"), with a to-be formed entity acceptable to National Equity Fund, Inc. ("NEF") as General Partner with a .01% ownership interest in the Partnership, and NEF as Limited Partner with a 99.99% ownership interest in the Partnership.
Federal Tax Credits Available:	\$1,500,000 annual allocation
Price per tax credit:	\$0.88
Net Federal Tax Credit Equity:	\$13,198,680
Non-Developer Fee Equity:	<u>Non-Developer Fee Capital Contribution #1</u> (20%) at Partnership close
	<u>Non-Developer Fee Capital Contribution #2</u> (80%) at Placed in Service, Cost Certification, Certificates of Occupancy.

Developer Fee Equity: Developer Fee is estimated at \$1,500,000 and will be paid with NEF equity contributions and allocated as follows:

Developer Fee Capital Contribution #1
(25%) at Partnership Closing.

Developer Fee Capital Contribution #2
(25%) at 100% Completion, Placed in Service, Cost Certification, Certificates of Occupancy.

Developer Fee Capital Contribution #3
(40%) at Qualified Occupancy, Achievement of Breakeven Operations, and Conversion of Construction Loan to Permanent Debt if present.

Developer Fee Capital Contributions #4
(10%) Delivery of 8609's, Breakeven Analysis, and First Year of Tax Filing.

Operating Reserve: At least 6 months of operating expenses, debt service and replacement reserves

Replacement Reserves: \$300/unit/year minimum, increasing 1.0% annually

Minimum DSCR: 1.15x

Income Inflation Factor: 2.0%

Expense Inflation Factor: 3.0%, including utilities

Underwritten Vacancy Factor: 7.0%

Asset Management Fee: \$5,000 annually from available cash flow

NEF Due Diligence Fee: \$55,000

Other Terms and Conditions: 1) The General Partner must have a firm commitment for construction financing and fixed-rate permanent financing with terms, conditions and Lender acceptable to the Limited Partner.

2) Receipt, review, and approval of the appraisal, market study, environmental and geological reports, plans and specifications, contractor and architect agreements, and such other due diligence as is customary and reasonable for an equity investment of this nature and amount.

3) The Capital Contributions are based on mutually agreed upon closing date, construction schedule and lease-up schedules.

4) NEF has reviewed the guarantor, Avalon Housing's, financial statements and is comfortable with its financial capacity, subject to NEF's further review and full guarantor financial analysis at the time of underwriting. Final authority to invest rests solely with NEF's investment Review Committee.

5) NEF has reviewed the project underwriting and approved exceptions to MSHDA underwriting standards, as noted above.

6) The terms of this letter are subject to change based upon investor yield requirements at the time of closing.

After you have reviewed both the terms outlined above and the attached financial projections, please contact me with any questions or issues that you may have. Upon the project's receipt of the low income housing tax credits, NEF will issue our binding commitment letter and begin our internal due diligence process to close on the subject project. Please understand that any binding commitment can only be issued by NEF following the completion of its due diligence process and approval by its investment committee as well as identification of an upper tier investor for this development.

We are excited about the prospects of investing in your development.

Very truly yours,

NATIONAL EQUITY FUND, INC.



By:

Kristen Senff
Vice President
614-216-8695



STATE OF MICHIGAN

GRETCHEN WHITMER
GOVERNOR

MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
LANSING

EARL J. POLESKI
EXECUTIVE DIRECTOR

February 20, 2019

Wendy Carty-Saxon
Hickory Way Apartments II LDHA LP
1327 Jones Drive, Suite 102
Ann Arbor, MI 48105

Re: Hickory Way Apartments Phase II (Project # I18066)

Dear Ms. Carty-Saxon:

The Michigan State Housing Development Authority has awarded the above referenced project a Reservation for Low Income Housing Tax Credit in an annual amount up to **\$965,159**. The Reservation document, included with this letter, is to be signed by an authorized representative of your organization, **notarized**, and returned to this office within ten days. The Reservation will not be considered valid, and the project will not be considered to have Tax Credits, until the signed document is received in our office.

The Reservation is conditional because the Environmental study received a Conditional Go. These conditions, which have been incorporated into the Reservation document, must be corrected for the Reservation to remain in effect. Information demonstrating that the conditions have been met must be submitted and determined to be acceptable by the Authority's LIHTC Allocations Manager and the Authority's Chief Environmental Officer no later than **February 20, 2020** or the credit will be rescinded.

IMPORTANT NOTE on SUBSIDY LAYERING REVIEWS (SLR): For projects relying on the use of funding from HUD, USDA RD and/or MSHDA – Prior to the project closing on construction debt financing, permanent debt financing, and/or investor equity and starting construction, the applicant is required to complete a SLR Application (found on MSHDA's website) and submit the completed SLR Application to Corey Monroe at MSHDA. All SLRs should be completed and approved prior to project closings. Please refer to the SLR Memorandum of Understanding (SLR MOU) and related documents on MSHDA's website for information regarding whether a SLR is required for your project and the process for having a SLR completed. According to the SLR MOU, Applicants should expect 30-40 working days to complete an SLR and are encouraged to coordinate and plan accordingly. A SLR will also be conducted at the time of final review after construction completion.

IMPORTANT NOTE on APPRAISAL REQUIREMENTS: For all projects having an acquisition cost as a part of the total project costs, please review LIHTC Allocation Policy #8, Real Estate Appraisal Requirements, found in Tab W of MSHDA's Combined Application for Rental Housing Programs, to understand how the acquisition costs included in the transaction will be valued.

Hickory Way Apartments Phase II
February 20, 2019
Page 2

With regard to future deadlines the project will be expected to meet in order to demonstrate substantial progress, owners should also be reminded that all of the requirements of Section XII of the 2019-2020 Qualified Allocation Plan must be fulfilled within one year of the date of the Reservation. **Failure to fulfill these requirements will result in a loss of the tax credit allocation and may result in negative points to the Applicant in future funding rounds.**

Also enclosed is the Gross Rent Floor Election form. This form must be signed and returned with the Reservation document.

The Authority charges a fee equal to 6% of the annual tax credit dollar amount awarded. Three percent of the annual tax credit dollar amount, **\$28,955**, is to be returned with the executed Reservation form. The remaining 3% shall be due at the time of the 10% Test.

All signed documents should be returned to the attention of Carol Thompson in the Low Income Housing Tax Credit Program office at the address below:

MSHDA
Low Income Housing Tax Credit Program
735 East Michigan Avenue
PO Box 30044
Lansing, MI 48909

If sending via overnight mail, leave out the PO Box and use Zip Code 48912.

If you have any questions regarding this process, please call LIHTC Staff at (517) 373-6007.

Sincerely,



Chad Benson
Allocations Manager
Low Income Housing Tax Credit Program

Enclosure



**WASHTENAW COUNTY
FINANCE DEPARTMENT**

Purchasing Division

P.O. Box 8645, 220 N. Main, Ann Arbor, MI 48107-8645
Phone (734) 222-6760, Fax (734) 222-6764
www.purchasing.ewashtenaw.org

June 25th, 2021

Avalon Housing

Aubrey Patino
1327 Jones Dr., Suite 102
Ann Arbor, MI 48105

RE: RFP# 8020 – Property Maintenance

Dear Mr/Ms. Patino,

Thank you for your proposal relative to the referenced bid. We have concluded our evaluation and wish to report that your proposal has been accepted and you have been selected for the award from this solicitation as follows:

Hickory Way Apartment Phase II – \$200,000 (*\$147,208 with \$42,503 from HOME Program income and \$10,289 from HOME 2020-2021 carry-over*)
Hickory Way Apartment Phase III - \$197,765
Veridian at County Farm North - \$725,000
HOME CHDO Operating - \$62,939

The disbursement of above funds to Avalon Housing, Inc. is contingent upon HUD's release of funds, HUD's Environmental Review clearance and the execution and recording of County legal documents (Affordability Agreement, Mortgage and Note).

A contract and a purchase order will be generated and forwarded to you. You can expect the department identified in the RFP to contact you regarding contract development. Per Washtenaw County procurement policies and procedures, work cannot commence until a fully executed contract is complete and a purchase order is issued.

Washtenaw County requires a vendor application form to be on file for all vendors that are currently doing business with the County. By filling out this form it will ensure you receive your purchase order and payment(s) in a timely manner. If you have not done so already, you may find the vendor application available on-line at: purchasing.ewashtenaw.org.

We look forward to a good working relationship.

Sincerely,

Angela O. Perry

Angela O. Perry
Purchasing Manager
cc: RFP# 8020 file



September 22, 2014

Mrs. Wendy Carty Saxon
Avalon Housing Inc.
Arbordale Apartments 2014 Inc
1327 Jones Drive, Suite 102
Ann Arbor, MI 48105

Re: Arbordale Apartments MSHDA#1425-2

Dear Mrs. Carty-Saxon:

We are pleased to inform you that the Michigan State Housing Development Authority (the "Authority") has awarded you with HOME funds, subject to the following conditions, provided under the National Affordable Housing Act of 1990 in connection with the acquisition and rehabilitation of the above Development. The Development to be acquired and rehabilitated is located at 1010 thru 1030 Arbordale Drive in the City of Ann Arbor, Washtenaw County. The Development consists of 39 family housing units and related facilities that will be acquired and rehabilitated for an estimated Total Development Cost of Four Million Eight Hundred Sixty-Five Thousand One Hundred Twenty-Two Dollars (\$4,865,122).

The conditions to this award are as follows:

- A. Conditional Award.** This award is subject to final approval by the Authority of the Mortgagor's application for a mortgage loan and issuance of a mortgage loan commitment for the proposed transaction. If the Mortgagor fails to meet all the Authority's underwriting guidelines and to obtain the Authority's final approval within six months of the date of this Award Letter, then the award of HOME funds shall be subject to termination at any time thereafter at the option of the Authority.

In addition, please note that the Authority has only \$3.5 million in HOME funding available for the PSH Set-Aside proposals planning to submit under the October 1, 2014 Tax Credit funding round. The numbers of PSH proposals seeking HOME funds have requests far exceeding the \$3.5 million available. Therefore, if tax credit reservations are awarded to multiple PSH proposals in the October funding round where the aggregate total gap funding needed exceeds the funding available, those proposals will compete against one another for an award of HOME funds. The proposals with the highest ranking and whose aggregate total gap funding does not exceed the amount of funding available (\$3.5 million) will be presented to Loan Committee for commitment/gap funding award approval. The ranking criteria are based on the following;

- Ratio of gap financing to hard debt from MSHDA
- Level of MSHDA gap financing per PSH unit needed to complete the project
- Taxable Bond financing supported by the project

735 East Michigan Avenue, P.O. Box 30044, Lansing, Michigan 48909
michigan.gov/mshda • 517.373.8370 • FAX 517.335.4797 • TTY 800.382.4568

- B. Effectiveness of Award.** This Award of HOME funds shall become effective only if an original of this document is returned to the Authority before September 30, 2014 with acceptance endorsed on the Award Letter by such signatories as are properly authorized to bind the parties named herein.
- C. Environmental Clearance.** This Award Letter is expressly conditioned on satisfactory completion of the environmental review requirements as provided in 24 CFR Part 58 and the issuance of a validly executed HUD form 7015.16 for the Development. This Award Letter does not constitute site approval by any state or federal authority, nor a commitment of funds. The Mortgagor and Sponsor agree that they shall not commit any funds or undertake any project as prohibited by 24 CFR §58.22 until HUD form 7015.16 is issued.

The general terms of the HOME Loan are as follows:

1. **Amount of Award.** The amount of the HOME award shall not exceed One Million Six Hundred Thirty Five Thousand Dollars (\$1,635,000). The final amount of the award will be determined by the Authority prior to closing. The award shall be made in the form of a repayable loan to the Mortgagor (the "HOME Loan").
2. **HOME Program Requirements.** The Mortgagor agrees to comply with the requirements of the HOME Program, as contained in Title 24, Part 92, Code of Federal Regulations (24 CFR 92.1, et seq), for the period of affordability for the Development. The period of affordability for the Development shall be fifteen (15) years, beginning after "project completion" (the "Period of Affordability"), which is defined by 24 CFR 92.2 as the date upon which all of the following have been satisfied: (a) all requirements necessary for the transfer of title and completion of construction have been performed; (b) the Development complies with all applicable HOME requirements, including the property standards contained in 24 CFR 92.251; (c) the final draw of HOME funds in connection with the construction of the Development has been made; and (d) the Development's completion information has been entered in the disbursement and information system established by HUD.
3. **HOME Specific Activity.** The proceeds of the HOME Loan shall be used solely in connection with the property that has been occupied, in order to acquire and rehabilitate such property.
4. **Low and Moderate Tenants.** The Mortgagor must agree to restrict the occupancy of all units at this Development to individuals and families whose incomes do not exceed 80 percent of area median income. In addition, 8 units shall be restricted to households whose incomes do not exceed 50 percent of area median income. These income restrictions will be in the form of a covenant running with the land.
5. **HOME Rental Requirements.** For the Period of Affordability, the monthly rents to be paid by the tenants of all HOME-Assisted units at the Development may not exceed the lesser of (i) existing Section 8 Fair Market Rents for comparable units in the area as established by HUD under 24 CFR 888.111, less monthly utility allowances, or (ii) one-twelfth (1/12) of thirty percent (30%) of the adjusted income of a family whose annual income equals 65% of area median gross income, as determined by HUD, adjusted for family size. In addition, the monthly rents to be paid by the tenants of the "Low" HOME-Assisted Units may not exceed the lesser of (i) existing Section 8 Fair

Market Rents for comparable units in the area as established by HUD under 24 CFR 888.111, less monthly utility allowances, or (ii) one-twelfth (1/12) of thirty percent (30%) of the adjusted income of a family whose annual income does not exceed 50% of area median gross income, as determined by HUD. The rents for the HOME-Assisted Units will be controlled by the Authority's Office of Asset Management in accordance with these requirements. Pursuant to 24 CFR 92.252(i)(2), existing tenants who no longer qualify as low income families must pay as rent not less than thirty percent (30%) of the family's adjusted monthly income, as recertified annually, but not to exceed, however, the market rent for comparable, unassisted units in the neighborhood.

6. **Term of Affordability.** The term of affordability for the restrictions shall be Fifteen (15) years from the date of "project completion" as defined in 24 CFR 92.2.

7. **Development Cost Analysis.** Attached as Exhibit B and made a part of this Award Letter is a Development Cost Analysis and Proforma reflecting the Total Development Cost, including a detail of the estimated costs and proposed sources of funding. The Mortgagor and the Authority may agree to adjust these costs and funding sources prior to closing if necessary to facilitate the consummation of the proposed transaction.

8. **Interest Rate.** The HOME Loan shall bear interest at the rate of Three and 00/100 percent (3%) per annum.

9. **Loan Term.** The term of the HOME Loan shall not exceed fifty (50) years after the HOME Loan closing.

10. **Commitment Fee.** A 4% loan commitment fee will be charged.

11. **Relocation.** If the Development is occupied and any tenants will be displaced as a result of the acquisition, construction, or rehabilitation of the Development by the Mortgagor, the Mortgagor agrees to comply with the relocation requirements of 24 CFR Part 42 and 49 CFR Part 24, as well as 24 CFR §570.606.

12. **Other HOME Requirements.** The Mortgagor must agree that it shall not refuse to lease any dwelling unit in the Development to a participant or holder of a voucher or certificate of eligibility under Section 8 of the U.S. Housing Act of 1937 because of the status of the prospective tenant as such a participant or holder. The Mortgagor must also agree to comply with all applicable HOME, Community Development Block Grant (CDBG) and other regulations and requirements applicable to the use of HOME funds and to enter into a regulatory agreement with the Authority prior to closing in the form of a covenant running with the land.

13. **Assignment or Transfer of Award.** This award of HOME funds to the Mortgagor shall not be assignable or transferable by the Mortgagor or the Sponsor without the prior written consent of the Authority.

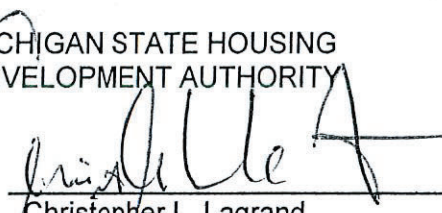
14. **Survival of Award.** This Award of HOME funds shall not be considered merged upon the closing of the HOME Loan, and all terms and conditions of this Award Letter, whether or not embodied in the documents signed at closing, shall survive the closing of the HOME Loan.

15. **Designation of Subordinate Funds.** The Authority reserves the express right, in its sole discretion, to substitute alternate funding sources to replace some or all of the HOME funds. In the event that the Authority does substitute an alternate source of funds, the Borrower shall comply with all requirements necessary for the Authority to use said alternate source of funds.

16. **Fraud Penalties.** The Sponsor and Mortgagor acknowledge that any false pretense, including any false statement or representation, or the fraudulent obtaining of money, real or personal property, or the fraudulent use of an instrument, facility, article, or other valuable thing or service pursuant to his/her/its participation in any Authority program, is punishable by imprisonment for up to ten years or by a fine up to \$5,000 or both.


Sincerely,

MICHIGAN STATE HOUSING
DEVELOPMENT AUTHORITY

By: 
Christopher L. Lagrand
Its: Chief Housing Investment Officer

Accepted on 9-25-2014, by:

MORTGAGOR: *Arbordale A of 2014 LDNA CA*
Arbordale Apartments 2014 Inc.
General partner of the owner

By: 
Its: *Treasurer*

SPONSOR:
Avalon Housing Inc.

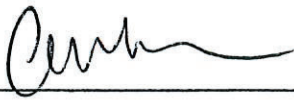
By: 
Its: *Executive Director*

EXHIBIT A

LEGAL DESCRIPTION

Property located in the City of Ann Arbor, Washtenaw County, Michigan legally described as:

Lot 1, ARBORDALE SUBDIVISION, according to the plat thereof as recorded in Liber 11 of Plats, page 8, Washtenaw County Records.

Tax Item No. 09-09-31-101-013



City of Ann Arbor
Office of the City Administrator
301 E. Huron Street, PO Box 8647
Ann Arbor, MI 48107-8647
734-794-6110

September 24, 2021

Elizabeth Rademacher
LIHTC Allocations Manager
MSHDA
735 E. Michigan Ave
Lansing, MI 48912

Re: The Grove at Veridian

Dear Ms. Rademacher:

In November 2020, the voters of the City of Ann Arbor approved an affordable housing millage for the construction, acquisition and maintenance of affordable housing in the City of Ann Arbor.

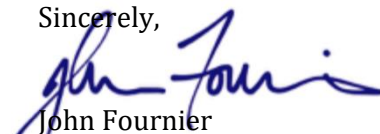
The City has worked closely with Avalon to successfully develop fifty units of affordable housing at The Grove at Veridian, 2270 Platt Road in Ann Arbor. We are excited about the possibility of bringing fifty new units of affordable housing to the City, with thirty (30) of these units further committed as supportive housing. Avalon has been a long-time provider of affordable and supportive housing in our community, and we are pleased to have them continue to bring much-needed new units into our community.

Avalon recently requested \$1,100,000 in millage funds for The Grove at Veridian for development-related costs. This request came before Ann Arbor City Council on June 7, 2021 and was approved.

We understand that Avalon has established an LDHA LP for the project and that the funds will be loaned into the partnership, with Avalon agreeing to a 99-year affordability period and term and a 0% interest deferred payment loan. The disbursement of funds is contingent upon execution of a Loan Agreement.

Please feel free to contact me directly with any questions about this letter at 734-794-6700 Ext. 41107.

Sincerely,


John Fournier
Acting City Administrator

**Ann Arbor Downtown Development Authority Meeting Minutes
Wednesday, May 1, 2019**

Place: DDA Office, 150 S. Fifth Avenue, Suite 301, Ann Arbor, 48104
Time: Chair Klopf called the meeting to order at 12:00 p.m.

1. ROLL CALL

Present: Bob Guenzel, Tyler Kinley, Marie Klopf, Joan Lowenstein, Jessica A. S. Letaw, Darren McKinnon, John Mouat, Rishi Narayan, Keith Orr, Phil Weiss

Absent: Howard Lazarus, Molly McFarland

Staff: Susan Pollay, Executive Director
Joseph Morehouse, Deputy Director
Sara McCallum, Deputy Director (incoming)
Maura Thomson, Communications Manager
Amber Miller, Capital & Private Projects Manager
Jada Hahlbrock, Manager of Parking Services
Liz Rolla, DDA Project Manager
Kelley Graves, Management Assistant

Audience: Ray Detter, Downtown Area Citizens Advisory Council
Mike McKiness, Republic Parking System
Chris Simmons, get!Downtown
David Diephuis
Peter Honeyman, downtown resident
Wendy Carty-Saxon, Larry Catrinar, Sandra Clark/Avalon Housing
Jennifer Hall, Tim Olivier/ AAHC
Marianne James, Charlotte Csicila/The Ark
David Benkes-Toth, Huron High School

2. APPROVAL OF THE BOARD MEETING AGENDA

Mr. Narayan moved and Mr. Orr seconded the motion to approve the agenda.

A vote on the motion to approve the agenda showed:

Ayes: Guenzel, Kinley, Klopf, Letaw, Lowenstein, McKinnon, Mouat, Narayan, Orr, Weiss

Nays: None

Absent: Lazarus, McFarland

The motion was approved.

3. AUDIENCE PARTICIPATION

Ark Director James thanked the DDA for its grant. She said the project goal had been to make the Main St sidewalk more pedestrian friendly, but the DDA's grant guidelines helped the Ark make

Ann Ashley Expansion Bond: Mr. Guenzel reported the project site plan is scheduled to be considered by the Planning Commission later this month; in anticipation of the project making its way to City Council, the committee reviewed the project bond financing plan.

The next Finance Committee meeting will be on Thursday, May 30 at 1 pm.

8D. SUBCOMMITTEE REPORTS- PARTNERSHIPS COMMITTEE

Ms. Lowenstein moved and Mr. Weiss seconded the following resolution:

RESOLUTION PROVIDING AVALON WITH A GRANT TO MAKE SAFETY AND STRUCTURAL IMPROVEMENTS TO FIVE RESIDENTIAL PROPERTIES

Whereas, The DDA is a catalyst for strengthening economic vibrancy and quality of life in the downtown area, and to meet its mission, DDA supports a variety of affordable housing projects, including projects that contribute to reducing homelessness in the downtown;

Whereas, Avalon Housing has partnered with the DDA on the acquisition and rehabilitation of several affordable housing units since 1992, and the DDA's \$1.18M investment in these properties has enabled Avalon to leverage over \$7.3M in additional financing;

Whereas, Avalon Housing has requested that the DDA provide a \$190,000 DDA Housing Fund grant to support two important code-related improvements to Avalon-owned properties located within or immediately adjacent to the DDA District, which are:

- Installation of sprinkler systems in 518 and 522 S. Division, 532 N. Main, and 411 N. Ashley. These buildings contain 22 SRO units, which serve vulnerable, disabled, and formerly homeless individuals. The cost of this project is \$110,000
- Structural repairs to 819 Third Street, including new supporting reinforced concrete block walls and revised entry to safeguard the basement residential unit. This building also serves formerly homeless individuals. The cost of this project is \$80,000

Whereas, The DDA Partnerships Committee recommends DDA approval of this grant and urges that it be paid as quickly as possible in recognition of the urgency of these projects;

Whereas, The DDA committed \$745,000 from its Housing Fund to realize its goal of a substantial number of affordable housing units associated with the redevelopment of the former Y-lot, and there will be sufficient scheduled annual transfers into the DDA Housing Fund that ensure DDA funding will be available at the time the former Y-lot is developed;

RESOLVED, The DDA approves a grant to Avalon Housing for \$190,000 from its Housing Fund to support the installation of sprinkler systems in 518 and 522 S. Division, 532 N. Main, and 411 N. Ashley Street, and structural repairs to 819 Third Street;

Mr. McKinnon asked about the structural work; Ms. Carty-Saxon invited Avalon's architect David Esau to respond. Mr. Esau said that temporary shoring had been installed previously, but what is proposed is intended to be a permanent fix.

A vote on the motion to approve the resolution showed:

Ayes: Guenzel, Kinley, Klopf, Letaw, Lowenstein, McKinnon, Mouat, Narayan, Orr, Weiss

Nays: None

Absent: Lazarus, McFarland

The resolution was approved.

Ms. Lowenstein moved and Mr. Mouat seconded the following resolution:

RESOLUTION APPROVING A GRANT TO THE ANN ARBOR HOUSING COMMISSION TO ASSIST WITH CAPITAL IMPROVEMENTS TO BAKER COMMONS

Whereas, The DDA is a catalyst for strengthening economic vibrancy and quality of life in the downtown area, and to meet its mission, DDA has supported a variety of downtown affordable housing projects, including projects which serve residents earning below 30% of Area Median Income;

Whereas, The DDA provided \$1.16M in funding support to the Ann Arbor Housing Commission between 2012 and 2014 to complete \$10M in renovations at Baker Commons, including many energy efficiency upgrades;

Whereas, The Ann Arbor Housing Commission has requested that the DDA provide a new grant for Baker Commons as follows to support several additional needed projects, including:

Install roof membrane and snow guards	\$71,537
Install roof ceiling vents and fans	\$5,022
Replace copper plumbing & fasteners	\$120,000 to \$150,000 (will be bid)
Replace common area flooring on all floors	\$86,099
Install LED hallway light fixtures	\$39,000
Install a brick monument sign	<u>\$12,000</u>
	\$333,658-\$363,658
AAHC replacement reserves	<u>\$107,000</u> (includes \$5,022 roof ceiling vents/fans installed in April)
Grant Request	\$256,658 (not to exceed)

Whereas, Baker Commons has 64 apartments, and 94% of its tenants have extremely low incomes (below 30% AMI) and 6% are very low income (below 50% AMI), and DDA's investments enables the building to remain available as a vital downtown affordable housing option;

WASHTENAW COUNTY BROWNFIELD REDEVELOPMENT AUTHORITY
ENVIRONMENTAL ASSESSMENT GRANT AGREEMENT

This Environmental Assessment Grant Agreement (the "Agreement") dated November 5, 2020 is entered between the WASHTENAW COUNTY BROWNFIELD REDEVELOPMENT AUTHORITY (the "Authority"), an authority established pursuant to Act 381 of 1996, as amended ("Act 381"), whose address is 220 N. Main Street, P.O. Box 8645, Ann Arbor, Michigan 48107-8645 and Avalon Non-Profit Housing Corporation, (the "Grantee") whose address is 1327 Jones Dr., Ann Arbor, MI 48105.

RECITALS

- A. Pursuant to Act 381, as amended, the Authority captures Brownfield Administrative Fees from Tax Increment Revenues from active brownfield projects for the purpose of carrying out brownfield redevelopment activities, including to pay for reasonable and actual administrative and operating expenses of the Authority.
- B. The Authority established the "Environmental Assessment Grant Program" in 2017, and amended it on August 2, 2018, April 4, 2019, and September 3, 2020 in order to fund eligible Department Specific Activities, pursuant to Act 381, on prospective eligible brownfield sites within member communities.
- C. The Authority intends to utilize reserves within its Administrative Fees to fund the Environmental Assessment Grant Program.
- D. At the December 3, 2020 meeting, the Authority approved the expenditure of 100% of the costs to conduct eligible Department Specific Activities, up to \$7,800 for the northern portion of property known as 2260-2270 Platt Road, Tax ID# 09-12-03-005, Ann Arbor, MI 48104 (the "Property").
- E. The Grantee wishes to utilize grant funds to conduct eligible Department Specific Activities, and the Authority will provide the grant fund under the Terms and Conditions herein contained.

TERMS AND CONDITIONS

Pursuant to the Recitals of this Agreement, the parties agree with each other as follows:

1. Grant – The Authority hereby agrees to grant to the Grantee up to \$7,800 to conduct Department Specific Activities within the Property. The work to be conducted will be in accordance with the ASTI Proposals dated December 1, 2020 and December 2, 2020 sent to Ms. Wendy Carty-Saxon, of Avalon Housing. Any increases in costs above the approved amounts will need to be approved by the Brownfield Authority Board.

2. Repayment – The provided grant funds shall not be required to be repaid to the Authority, provided the Grantee complies with all applicable Terms and Conditions.
3. Procurement of Eligible Activities – The Authority is bound to utilize Administrative fees captured in accordance with Act 381. Further, in establishing the Environmental Assessment program the Authority must be good stewards of the funds in ensuring they are utilized in the most cost-effective and efficient manner. Therefore, pursuant to the adopted Assessment Program Policy, the Grantee shall follow its own established procurement policies and procedures in arranging for the grant activities to be completed. Such procurement may include an award based on solicitation of competitive bids for the work, or may include work by a contractor previously chosen by the municipality through a competitive process where the qualifications of the environmental contractor to complete the required work were reasonably demonstrated. The Grantee must demonstrate to the Authority, through its designated staff, that the grant funds will be expended consistent with the noted methods.
4. Authority to Conduct Work on Behalf of Grantee – At the request of the Grantee, the Authority may conduct the grant-funded assessment work on behalf of the Grantee. The Authority will follow applicable Washtenaw County procurement procedures to contract with qualified environmental consultants to complete the work. This may include a singular request for quotes for the work to be conducted. Or, procurement may entail a periodic public release of Request for Qualifications to pre-approve, in advance of any specific work needed, qualified environmental consultants, retaining those contractors on an on-going basis in order to expedite the necessary work to be completed.
5. Extension of Reliance of Environmental Reports to Authority and Assignees – Any and all reports, investigations, testing, and information generated wholly or partially utilizing funding through this grant program shall include the ability of the Washtenaw County Brownfield Authority and its assignees and/or designees, as determined by the Authority, to rely upon such reports, investigations, testing and information. Further, copies of any and all reports shall be provided to the Authority once completed.
6. Disbursement – The Grant funds will be disbursed to the Grantee as approved Department Specific Activities are or have been completed, upon submittal by Grantee of a statement of costs of such activities paid or incurred from time to time, and receipt of reports, investigations, testing and information in accordance with Section 5 above, but not more frequently than monthly. Such a statement shall include a description of eligible work performed, and a copy of invoices for the work described in such statement. Within forty (40) days of a receipt of a complete statement and supporting invoices, brownfield staff shall review the statement, confirm that the work done is eligible, and disburse to Grantee the amount set forth in the statement, up to a cumulative disbursement not to exceed the amount approved by the Authority, up to \$7,800.
7. Unspent Grant Funds – If the final cost of the eligible activities conducted is below the maximum award, remaining unspent grant funds will not be reimbursed, but rather revert back to fund

reserves for use on other suspected brownfield sites. However, in accordance with Section 1, the Authority may consider an amendment to the previously approved application to increase the previous award, based on increased costs, or additional scope needed, provided any additional activities are eligible under Act 381.

8. Compliance with Applicable Environmental Regulations– It shall be the responsibility of the Grantee to comply with all applicable local, state and federal environmental regulations, as it applies to any and all Eligible Activities funded by the Grant.
9. Grant Expiration – All Eligible Activities shall be completed within one year of this Agreement, unless the Authority grants an extension.
10. Insurance – The Grantee shall purchase and maintain insurance coverages as indicated at limits not less than those set forth below. Grantee shall name Washtenaw County and Washtenaw County Brownfield Redevelopment Authority as an additional insureds under all coverages listed below except Worker’s Compensation. The Grantee shall maintain other insurance as it deems appropriate for its own protection.
 - a. Worker’s Disability Compensation and Occupational Disease Insurance including Employers Liability Coverage in accordance with all applicable statutes of the State of Michigan.
 - b. Commercial General Liability Insurance on an “Occurrence Basis” with limits of liability not less than \$1,000,000 per occurrence and \$2,000,000 aggregate combined single limit. Coverage shall include the following:
 - i. Contractual Liability
 - ii. Products and Completed Operations
 - iii. Independent Contractors Coverage
 - iv. Broad Form General Liability Endorsement or Equivalent
 - c. Motor Vehicle Liability Insurance, including Michigan No-Fault Coverage, with limits of liability of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage. Coverage shall include all owned vehicles, all non-owned vehicles and all hired vehicles.

The Grantee shall also require each and every contractor(s) and/or subcontractor(s) engaged by the Grantee to perform services pursuant to this Agreement to purchase and maintain insurance coverages at the limits set forth below. Grantee’s contractor(s) and/or subcontractor(s) shall name Washtenaw County and Washtenaw County Brownfield Redevelopment Authority as additional insureds under all coverages listed below except Worker’s Compensation, Motor Vehicle Liability, and Professional Liability.

- a. Worker's Disability Compensation and Occupational Disease Insurance including Employers Liability Coverage in accordance with all applicable statutes of the State of Michigan.
- b. Commercial General Liability Insurance on an "Occurrence Basis" with limits of liability not less than \$1,000,000 per occurrence and \$2,000,000 aggregate combined single limit. Coverage shall include the following:
 - i. Contractual Liability
 - ii. Products and Completed Operations
 - iii. Independent Contractors Coverage
 - iv. Broad Form General Liability Endorsement or Equivalent
- c. Motor Vehicle Liability Insurance, including Michigan No-Fault Coverage, with limits of liability of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage. Coverage shall include all owned vehicles, all non-owned vehicles and all hired vehicles.
- d. Professional Liability coverage with a minimum limit of \$1,000,000 each occurrence.


All insurance coverages described above shall remain in effect at all times until completion of all Eligible Activities. The Grantee shall deliver copies of certificates of insurance for each of the policies mentioned above to the Authority. If so requested, certified copies of all policies will be provided. It is understood and agreed that thirty (30) days advanced written notice of cancellation, non-renewal, reduction and/or material change in any coverage shall be sent to the Authority.

11. Indemnification – To the extent permitted by Michigan law, the Grantee shall indemnify and hold Washtenaw County and the Washtenaw County Brownfield Authority harmless from and against all actions, liabilities, demands, costs and expenses, including court costs and attorney fees, which may arise due to the Grantee's negligent, grossly negligent and/or intentional acts or omissions under this Agreement.
12. Freedom of Information Act – Grantee understands that all communications, information, and/or documentation submitted by Grantee may be open to the public under the Freedom of Information Act, Act No. 442 of the Public Acts of 1976, being Sections 15.23 to 15.24 of the Michigan Compiled Laws and no claim of trade secrets or any other privilege or exception to the Freedom of Information Act will be claimed by Petitioners as it relates to this Agreement.
13. Notices – All notices shall be given by registered or certified mail addressed to the parties at their respective addresses as shown above. Either party may change the address by written notice sent by registered or certified mail to the other party.
14. Assignment – The interest of any party under this Agreement shall not be assignable without the other parties' written consent.

- 15. Entire Agreement – This Agreement supersedes all agreements previously made between the parties relating to the subject matter. There are no other understandings or agreements between them.
- 16. Non-Waiver – No delay or failure by either party to exercise any right under this Agreement, and no partial or single exercise of that right, shall constitute a waiver of that or any other right, unless otherwise expressly provided herein.
- 17. Headings – Headings in this Agreement are for convenience only and shall not be used to interpret or construe its provisions.
- 18. Governing Law – This Agreement shall be construed in accordance with and governed by the laws of the State of Michigan.
- 19. Compliance with Applicable Law – Grantee agrees to comply all applicable federal, state, and local laws, statutes, rules, regulations, ordinances, and other legal obligations of a similar effect.
- 20. Counterparts – This Agreement may be executed in two or more counterparts, each of which shall be deemed an original but all of which together shall constitute one and the same instrument.
- 21. No Third Party Beneficiaries – This Agreement shall not be deemed or construed to create any rights to reimbursement or otherwise in the Consultant, Contractors, Subcontractors, or any third parties. This Agreement shall not be construed to create any third party beneficiary contract or claim, and the parties intend there to be no third party beneficiaries.
- 22. Binding Effect – The provisions of this Agreement shall be binding upon and inure to the benefit of each of the parties and their respective heirs, legal representatives, successors, and assigns.

The parties have executed this Agreement on the dates set forth below.

WASHTENAW COUNTY BROWNFIELD REDEVELOPMENT AUTHORITY

BY: 
Trevor Woollatt, Chairman

Date: _____

Attested to:

WASHTENAW COUNTY BROWNFIELD REDEVELOPMENT AUTHORITY
LOCAL BROWNFIELD REVOLVING FUND GRANT AGREEMENT

This Local Brownfield Revolving Fund Grant Agreement (the “Agreement”) dated September 16, 2021 is entered between the WASHTENAW COUNTY BROWNFIELD REDEVELOPMENT AUTHORITY (the “Authority”), an authority established pursuant to Act 381 of 1996, as amended (“Act 381”), whose address is 220 N. Main Street, P.O. Box 8645, Ann Arbor, Michigan 48107-8645 and Avalon Nonprofit Housing Corporation, d/b/a Avalon Housing, Inc. (the “Grantee”), a Michigan nonprofit corporation, whose address is 1327 Jones Drive, Suite 102, Ann Arbor, MI, 48105.

RECITALS

- A. Pursuant to Act 381, as amended, the Authority has established a Local Brownfield Revolving Fund (the “Fund”) for the purpose of facilitating brownfield redevelopment in the region.
- B. The Authority adopted a policy for awarding loans and grants from the Fund to support eligible activities on eligible brownfield properties.
- C. The Authority awarded the Grantee a \$17,456 grant of LBRF funds at the June 10, 2021 meeting, and an additional \$12,700 at the August 12, 2021 meeting, for a total of \$30,156, to support Phase I, II, BEA and Due Care Plan.
- D. The Eligible Property is known as 206-210 N. Washington in the City of Ypsilanti, parcel ID# 11-40-411-003.
- E. The Grantee wishes to utilize LBRF grant funds to conduct Eligible Activities within the eligible properties, and the Authority is willing to grant said funds on the Terms and Conditions herein contained.

TERMS AND CONDITIONS

Pursuant to the Recitals of this Agreement, the parties agree with each other as follows:

1. Grant – The Authority hereby agrees to grant to Avalon Nonprofit Housing Corporation up to \$30,156 to conduct eligible brownfield activities, as described in the submitted LBRF applications and accompanying cost proposals from ASTI dated May 27, 2021 and August 2, 2021, and Phoenix Contractors, Inc. proposal dated February 23, 2021.
2. Grant Budget – The Grantee submitted a list of proposed costs in the LBRF Application, (Exhibit A), and ASTI and Phoenix cost proposals, and was approved by the Authority not to exceed \$30,156.

3. Repayment – The funds granted shall not be required to be repaid to the Authority, provided the Grantee complies with all applicable Terms and Conditions.
4. Procurement of Eligible Activities – The Authority is bound to be good stewards of the public funds within the LBRF Fund. Therefore, the Authority will ensure the grant funds are utilized in the most efficient and effective manner. Grantee shall ensure the work to be funded with LBRF funds are procured in a manner that is competitive and ensures the most qualified contractor with the lowest price is selected to complete the activities.
5. Disbursement – The Grant funds will be disbursed to the Grantee as Eligible Activities are or have been completed, upon submittal by Grantee of a statement of costs of such activities paid or incurred from time to time, but not more frequently than monthly. Such a statement shall include a description of Eligible Activities performed, and a copy of invoices for the work described in such statement. Within forty (40) days of a receipt of a complete statement and supporting invoices, the Authority shall review the statement, confirm that the Eligible Activities are consistent with the Grant Budget, and disburse to Grantee the amount set forth in the statement, up to a cumulative disbursement not to exceed \$30,156.
6. Surplus Grant Funds – Should any grant funds remain after all Eligible Activities are completed, the surplus funds will be returned to the LBRF fund, or the Grantee may request use of the remaining funds for other Eligible Activities, up to \$30,156, provided those activities are given prior approval by the Authority.
7. Compliance with Applicable Environmental Regulations – It shall be the responsibility of the Grantee to comply with all applicable local, state and federal environmental regulations, as it applies to any and all Eligible Activities funded by the LBRF Grant.
8. Grant Expiration – All Eligible Activities shall be completed within eighteen (18) months of this Agreement unless the Authority grants an extension.
9. Insurance – The Grantee shall purchase and maintain insurance coverages as indicated, at limits not less than those set forth below. The Grantee shall also require each and every contractor(s) and/or subcontractor(s) engaged by the Grantee to perform services pursuant to this Agreement to purchase and maintain insurance coverages at the limits set forth below. Grantee and its contractor(s) and/or subcontractor(s) shall name Washtenaw County and Washtenaw County Brownfield Redevelopment Authority as an additionally insured under all coverages listed below except Worker’s Compensation. The Grantee shall maintain other insurance as it deems appropriate for its own protection.
 - a. Worker’s Disability Compensation and Occupational Disease Insurance including Employers Liability Coverage in accordance with all applicable statutes of the State of Michigan.

- b. Commercial General Liability Insurance on an “Occurrence Basis” with limits of liability not less than \$1,000,000 per occurrence and \$2,000,000 aggregate combined single limit. Coverage shall include the following:
 - i. Contractual Liability
 - ii. Products and Completed Operations
 - iii. Independent Contractors Coverage
 - iv. Broad Form General Liability Endorsement or Equivalent
- c. Motor Vehicle Liability Insurance, including Michigan No-Fault Coverage, with limits of liability of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage. Coverage shall include all owned vehicles, all non-owned vehicles, and all hired vehicles.
- d. Grantee shall ensure that Environmental Impairment Liability Insurance is provided by Contractors, sub-contractors and site work contractors engaging in environmental and/or demolition activities, covering any sudden and non-sudden pollution or environmental impairment, including clean-up costs and defense, with limits of liability of not less than \$1,000,000 per occurrence.
- e. Grantee shall ensure that Professional Liability coverage with a minimum of \$1,000,000 each occurrence is provided by Contractors, sub-contractors and site work contractors engaging in environmental and/or demolition activities.
- f. All insurance coverages described above shall always remain in effect until completion of all Eligible Activities. The Grantee shall deliver copies of certificates of insurance for each of the policies mentioned above to the Authority. If so requested, certified copies of all policies will be provided. It is understood and agreed that thirty (30) days advanced written notice of cancellation, non-renewal, reduction and/or material change in any coverage shall be sent to the Authority.

10. Indemnification – The Grantee shall indemnify, defend, and hold harmless, the Authority, Washtenaw County, and their officers, board members, commissioners, employees and agents from all claims, damages, lawsuits, costs and expenses, including reasonable attorney fees, incurred as a result of any acts, omissions, negligence, or gross negligence of the Grantee or its employees, agents, consultants, contractors or subcontractors related to the grant-funded activities or its performance under this Agreement. This indemnification includes any damages, costs, and expenses in excess of those covered by any insurance of the Grantee. The Grantee shall indemnify the Authority, Washtenaw County, and any of the listed entities officers, board members, commissioners, employees and agents from all reasonable costs and expenses, including reasonable attorney fees, incurred in the enforcement of any obligation or claim against the Grantee under this

Agreement. These indemnification provisions will survive the termination of this Agreement. By entering this Agreement, neither party waives any immunities provided under state or federal law.

11. Freedom of Information Act – Grantee understands that all communications, information, and/or documentation submitted by Grantee may be open to the public under the Freedom of Information Act, Act No. 442 of the Public Acts of 1976, being Sections 15.23 to 15.24 of the Michigan Compiled Laws and no claim of trade secrets or any other privilege or exception to the Freedom of Information Act will be claimed by Petitioners as it relates to this Agreement.
12. Notices – All notices shall be given by registered or certified mail addressed to the parties at their respective addresses as shown above. Either party may change the address by written notice sent by registered or certified mail to the other party.
13. Assignment – The interest of any party under this Agreement shall not be assignable without the other parties’ written consent.
14. Entire Agreement – This Agreement supersedes all agreements previously made between the parties relating to the subject matter. There are no other understandings or agreements between them.
15. Non-Waiver – No delay or failure by either party to exercise any right under this Agreement, and no partial or single exercise of that right, shall constitute a waiver of that or any other right, unless otherwise expressly provided herein.
16. Headings – Headings in this Agreement are for convenience only and shall not be used to interpret or construe its provisions.
17. Governing Law – This Agreement shall be construed in accordance with and governed by the laws of the State of Michigan.
18. Compliance with Applicable Law – Grantee agrees to comply all applicable federal, state, and local laws, statutes, rules, regulations, ordinances, and other legal obligations of a similar effect.
19. Counterparts – This Agreement may be executed in two or more counterparts, each of which shall be deemed an original but all of which together shall constitute one and the same instrument.
20. No Third Party Beneficiaries – This Agreement shall not be deemed or construed to create any rights to reimbursement or otherwise in the Consultant, Contractors, Subcontractors, or any third parties. This Agreement shall not be construed to create any third-party beneficiary contract or claim, and the parties intend there to be no third party beneficiaries.
21. Binding Effect – The provisions of this Agreement shall be binding upon and inure to the benefit of each of the parties and their respective heirs, legal representatives, successors, and assigns.

The parties have executed this Agreement on the dates set forth below.

WASHTENAW COUNTY BROWNFIELD REDEVELOPMENT AUTHORITY

BY: 
Trevor Woollatt, Chairman

Date: October 22, 2021

Attested to:


By: 
Lawrence Kestenbaum, County Clerk/Register

Date: 10/28/2021

Approved As to Form:

 10/28/2021
By: Office of Corporation Counsel
Michelle Billard, Corporation Counsel

~~Avalon Nonprofit~~ **Avalon Nonprofit Housing Corporation, Grantee**

BY: 
14C5962F15154C9...

PRINT NAME: Wendy Carty-Saxon

ITS: Director of Real Estate Development

Date: 10/15/2021 | 12:46 PM EDT

Exhibit A – LBRF Application and Cost Proposals

CR 52584
COUNTY OF WASHTENAW
HOUSING AFFORDABILITY AGREEMENT
1675-1677 Broadway, ANN ARBOR, MICHIGAN

This AGREEMENT dated this 30th day of Oct., 2020, between the COUNTY OF WASHTENAW, a municipal corporation, with office located in the County Administration Building, 220 North Main Street, Ann Arbor, Michigan 48107 ("COUNTY") and Avalon Second Nonprofit Housing Corporation, a Michigan non-profit corporation, whose is 1327 Jones Drive Suite 102, Ann Arbor, Michigan, 48105 ("AVALON").

RECITALS

- A. COUNTY receives funds from HUD pursuant to HUD's 2019 Community Development Block Grant Entitlement Communities Grants Program ("CDBG") and COUNTY is authorized to award CDBG funds pursuant to Title 1 of the Housing and Community Development Act of 1974, Public Law 93-383, as amended; 42 U.S.C. 5301, et. seq.; and
- B. COUNTY has been designated as an entitlement county for the CDBG Program and acts as the lead entity for the Washtenaw Urban County, which consists of the City of Ann Arbor, City of Dexter, City of Saline, City of Ypsilanti, Ann Arbor Township, Augusta Township, Bridgewater Township, Dexter Township, Lima Township, Manchester Township, Northfield Township, Pittsfield Township, Salem Township, Saline Township, Scio Township, Superior Township, Sylvan Township, Webster Township, York Township, and Ypsilanti Township; and
- C. AVALON desires to acquire and rehabilitate four units of rental housing at the property commonly known as 1675-1677 Broadway, Ann Arbor, Michigan ("Property"), described as follows:

Commencing at the intersection of the centerline of Broadway and the North and South half quarter line of Section 21, T2S, R6E, Ann Arbor Township, Washtenaw County, Michigan; thence Southwesterly along the centerline of Broadway 19.4 feet; thence Northwesterly deflecting 90°00' to the right 33.0 feet for a PLACE OF BEGINNING; thence Southwesterly along the Northwesterly line of Broadway 85.0 feet; thence Northwesterly deflecting 90°00' to the right 145.0 feet; thence Northeasterly deflecting 90°00' to the right 85.0 feet; thence Southeasterly deflecting 90°00' to the right 145.0 feet to the PLACE OF BEGINNING, being a part of the Northeast 1/4 of said Section 21.

Commonly known as 1675 & 1677 Broadway, Ann Arbor, Michigan
Tax Identification number: 09-09-21-104-015

- D. AVALON and COUNTY have entered into an Agreement for Subaward for Federal Financial Assistance dated December 9, 2019 related to this project which is hereby incorporated by reference; and

- E. COUNTY has approved \$70,000 in CDBG program funding as a recoverable grant to AVALON, as a developer, to support the redevelopment of Property, as specified by this Agreement; and
- F. AVALON has agreed that should the amount provided to AVALON be reduced for any reason, COUNTY shall not be responsible for any damages, claims or liabilities of any kind resulting from AVALON's reliance thereon.

In consideration of the mutual benefits, covenants and obligations contained in this Agreement, including the Attachments, and subject to the terms and conditions stated, **THE PARTIES AGREE AS FOLLOWS:**

1. USE OF FUNDS:

- a. **SCOPE OF SERVICES:** AVALON agrees to use \$70,000 in COUNTY CDBG funds for the eligible costs of acquisition, rehabilitation and related soft costs, including relocation expenses, of affordable rental housing located at Property. AVALON shall perform all services necessary to complete the project as set forth in **Attachment A** in accordance with CDBG guidelines which County is applying to Property.
- b. **DISTRIBUTION OF FUNDING:** The Federal Funds Obligated by this Agreement shall be made payable to either Avalon Housing, Inc. or to Absolute Title Company and sent to Avalon Housing, Inc. or Absolute Title Company, respectively, via electronic transfer of funds or paper check. The total funds of Seventy Thousand Dollars (\$70,000) shall be distributed at closing.
- c. **SCHEDULE:** AVALON expressly agrees to complete all work in accordance with the timetable set forth in **Attachment A**. Timely completion of the work specified in this Agreement is essential. By signing this Agreement, AVALON agrees to make every effort to ensure that the project will not be delayed. Failure to meet deadlines shall constitute a breach of this Agreement and COUNTY may at its sole discretion exercise any rights available to it under this agreement or any associated security agreements, including the revocation of CDBG funds.
- d. **BUDGET:** AVALON expressly agrees to complete all work in accordance with the budget set forth in **Attachment B**.
- e. AVALON expressly agrees to utilize funds available under this Agreement to supplement rather than supplant funds otherwise available.

- 2. **AFFORDABILITY: [24 CFR 92.504(c)(3)(ii):** AVALON agrees to comply with the requirements of 24 CFR 92.252 (rental) or 92.254 (homeowner), as applicable, pertaining to the qualification of units assisted under the CDBG program as affordable housing and shall agree to the repayment of funds if the housing does not meet the affordability requirements for the duration of this Agreement as outlined in **Attachment C** of this Agreement, the terms of which are incorporated by reference.

- a. **CDBG MINIMUM PERIOD OF AFFORDABILITY REQUIREMENTS**

A minimum term of affordability is required by HUD and COUNTY on all CDBG-assisted housing units. The terms of affordability shall be based upon the amount of funds invested per unit, but shall be a minimum of:

- i) Less than \$15,000 per unit – 5 years
- ii) \$15,000 to \$40,000 per unit – 10 years
- iii) Greater than \$40,000 per unit or rehabilitation involving refinancing – 15 years
- iv) New construction or acquisition of newly constructed housing – 20 years

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the day and year first written above.

Avalon Second Nonprofit Housing Corporation,
a Michigan non-profit corporation

Dated: 10.30.2020

By: [Signature]
Wendy Carty-Saxon
Its: Director of Real Estate Development

STATE OF MICHIGAN)
)ss:
COUNTY OF WASHTENAW)

On this 30th day of Oct., 2020, before me, a Notary Public in and for said County, personally appeared Wendy Carty-Saxon, who being by me duly sworn, did say that s/he is Director of Real * of Avalon Second Nonprofit Housing Corporation and did represent that s/he was duly authorized to execute this document on behalf of said Michigan non-profit corporation.

*Estate Development

[Signature]
_____, Notary Public
Acting in Washtenaw County, Michigan
Washtenaw County, Michigan
My commission expires: _____

Lori K. Russo
Notary Public, Washtenaw County, MI
My Commission Expires Dec. 8, 2025
Acting in Washtenaw County


WASHTENAW COUNTY,
a Municipal Corporation

Dated: _____

By: 
Gregory Dill
Washtenaw County Administrator

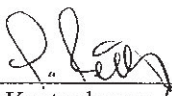
STATE OF MICHIGAN)
)ss:
COUNTY OF WASHTENAW)

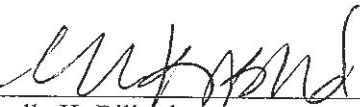
On this 21st day of October, 2020, before me, a Notary Public in and for said County, personally appeared Gregory Dill, who being by me duly sworn, did say that he is the Administrator of Washtenaw County and did represent that he was duly authorized to execute this document on behalf of said Municipal Corporation.


Edwin Latimer Peart, Notary Public
Acting in Washtenaw County, Michigan
Washtenaw County, Michigan
My commission expires: July 26, 2021

ATTESTED TO:

APPROVED AS TO FORM:

By:  10/21/2020
Lawrence Kestenbaum P. Kelly (DATE)
County Clerk/Register
Deputy

By:  10.21.2020
Michelle K. Billard (DATE)
Corporation Counsel

Prepared by and when recorded return to:

Ian James Reach (P25316)
Reach Law Firm
117 N. First St. Ste 103
Ann Arbor, MI 48104

Rev. October 19, 2020



OLD NATIONAL BANK®

September 15, 2021

Ms. Wendy Carty-Saxon
Avalon Nonprofit Housing Corporation
1327 Jones Drive Suite 102
Ann Arbor, MI 48105

Re: The Grove at Veridian – Construction Loan Term Sheet

Dear Wendy:

Thank you for allowing Old National Bank an opportunity to provide a term sheet for construction financing for the Grove at Veridian development, the new construction of a 50-unit affordable housing complex and community center incorporating Low Income Tax Credits in Ann Arbor, MI, the “Project”. We are very excited to help bring this project to the community. We have reviewed the information that you have provided to date. This letter will serve to outline the general terms and conditions based on that information.

CONSTRUCTION-BRIDGE LOAN:

- | | |
|---------------------|--|
| <u>Borrower:</u> | Entity to be formed to construct, own, and operate the Grove at Veridian in Ann Arbor Michigan |
| <u>Loan Amount:</u> | Lesser of 80% of as improved, appraised value of the Project incorporating the value of the LIHTC or up to \$10,650,000. |
| <u>Purpose:</u> | Along with required equity and grant funding at close, the loan funds will contribute to: <ol style="list-style-type: none">1. Purchase the real property located from Washtenaw County located on Platt Road in Ann Arbor, MI.2. Construct 50 units of affordable housing with a community center, and provide for various interest reserves, operating and lease up reserves, developer fees, and other soft costs. |

Repayment: The \$10,650,000 construction loan balance shall be repaid with the Low Income Housing Tax Credit Equity investment and the proceeds from permanent financing. The loan shall be repaid with the second equity installment and the permanent financing proceeds based on the equity pay-in schedule described below:

Equity Funding Schedule

20.1%	\$ 2,658,327	Closing
72.5%	\$ 9,573,766	Construction Completion / CO
6.3%	\$ 825,314	Final Cost Certification
1.1%	\$ 141,272	8609 / Permanent Mortgage Financing

100% \$ 13,198,679 Total Equity

Permanent Mortgage Funding

\$1,100,000 permanent mortgage to be funded when the project reaches Qualified Occupancy.

The construction loan must be repaid in full at the commencement of the permanent mortgage.

Developer Fee: The Developer Fee is expected to be paid on the following schedule:

Developer

<u>Fee</u>	<u>Event</u>
\$ 353,181	Closing (1 st Equity installment)
\$ 353,181	Construction Completion / CO
\$ 565,088	Qualified Occupancy / Permanent Mortgage Commencement
\$ 141,272	K1s
\$ 87,278	Deferred
\$1,500,000	Total

Interest Rate: A variable Rate of the Old National Bank's Prime Rate + ½% (Currently 3.75% based on an Old National Bank Prime Rate of 3.25%).

Loan Term: 24 month draw up construction loan.

Payment: Interest only, monthly payments during the construction and bridge period shall be funded with the construction loan proceeds.

Fees: \$80,000 loan closing fee; plus third party reports (contemplated to be appraisal, environmental, and construction inspector), fees, including title insurance, and other standard lender fees incurred in connection with closing a loan.

<u>Prepayment Fee:</u>	There will be no prepayment fee from pay down from the construction loan balance.
<u>Guaranty:</u>	Construction loan, construction completion, reserve funding, and operations to be fully guaranteed by Avalon Non-Profit Housing Corporation.
<u>Collateral:</u>	A first mortgage lien on the Project and all improvements thereto. Assignments of leases and rents, vouchers, management agreement, development agreement and fee, construction contract, architect agreement, reserves if allowed by MSHDA, equity proceeds from the LIHTC Investor, managing member's or general partner's interest in the LDHA or Limited Partnership, and beneficiary interest in a payment and performance bond issued by an insurer acceptable to the Bank.
<u>Construction:</u>	The Borrower will arrange for a fixed price contract in a form and amount that is acceptable to the Bank with a general contractor that is also acceptable to the Lender. The Contractor obligations will be secured by a payment and performance bond in an amount of the construction contract and in form acceptable to the Lender. The Project will establish a project held construction contingency of at least 5% of hard costs. The Lender will require a review of the construction contract and architectural plans and ongoing construction progress by a third-party construction inspector to be paid by the Partnership.
<u>Reserves:</u>	<p>The budget will provide for an interest reserve in an amount to fund interest until the project achieves Qualified Occupancy and the Permanent Loan is funded (currently projected at \$350,000).</p> <p>The budget will provide for a lease-up reserve in an amount to fund overruns until the project achieves Qualified Occupancy and the Permanent Loan is funded. This amount will be funded no later than the Construction Completion equity installment.</p>
<u>Conditions:</u>	<p>Lending and all terms are subject to:</p> <ol style="list-style-type: none"> 1. Full underwriting by Old National Bank's credit department; 2. Formal Old National Bank approval; 3. Review and acceptance of Tax Credit Investor's terms and final Limited Partnership Agreement; 4. Review and acceptance in Old National Bank's sole discretion of all environmental reports;

5. Review and acceptance of general contractor's resume and financial statements;
6. Evidence of the demand for apartments and permanent supportive housing;
7. Evidence of Guarantor liquidity in an amount acceptable to Old National Bank;
8. Review and acceptance in Old National Bank's sole discretion of an appraisal to be ordered by Old National Bank at borrower's expense;
9. Review and acceptance of plans, specs, and construction contract by a bank-appointed inspector;
10. The borrower's ability to obtain and monetize IRS Section 42 Low Income Housing Tax Credits for the Project in an amount and under terms satisfactory to Old National Bank;
11. Evidence of Section 8 vouchers awarded to the project;
12. Review and acceptance of an unconditional signed commitment for permanent financing;
13. Review and acceptance of commitments for all project sources including additional hard debt, grants, soft debt, or incentive programs
14. Receipt and satisfactory review in Old National Bank's sole discretion of all additional information required by Old National Bank as part of its due diligence;

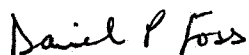
Old National Bank has reviewed the project underwriting and approves the exception to MSHDA's operating standards, including the proforma operating costs above MSHDA's standard reflecting the Project's supportive housing focus with the higher management and maintenance costs reflecting the population to be housed.

Any terms and conditions contained in future term sheets, commitments or loan documents will supersede the terms and conditions contained within this document. This term sheet is effective as of the date noted above. If tax credits are awarded, this proposal will expire on August 31, 2022 unless reissued by the Lender.

Old National Bank requests that the Borrower, its consultants and employees, and MSHDA keep the terms of this equity proposal confidential and not disclose the terms to any third party.

We appreciate the opportunity to provide a proposal for financing this development.

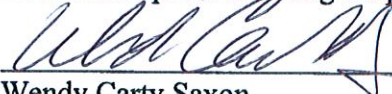
Sincerely,



Daniel P. Foss
Vice President
Commercial Relationship Manager
Old National Bank

Agreed and accepted this 15th day of Sept, 2021^{WS}, 2020.

By: Avalon Nonprofit Housing Corporation

By: 
Wendy Carty Saxon

Its: Director of Real Estate Development



Phone 734.475.1355
Fax 734.475.7740
chelseastate bank

1010 South Main Street • Chelsea, MI 48118-1435

September 26, 2019

Ms. Wendy Carty-Saxon
Real Estate Development Director
Mr. Masa Nohara
Director of Finance
Avalon Nonprofit Housing Corporation
1327 Jones Drive
Suite 102
Ann Arbor, MI 48105

Dear Wendy and Masa:

You and Avalon continue to provide such great services to our community, thank you.

I thought that construction cost increases were mostly materials related but lately have been reading that skilled trade's shortages are at least as responsible for building inflation. Hopefully we will be able to fix the Hilltop View costs before they increase again!

On behalf of Chelsea State Bank (the "Bank") I am pleased to provide you with this commitment letter outlining the general terms and conditions of a term loan (the "Credit Facility" or "Loan") to assist with Avalon's long-term holding of the apartment complex at 7651 Dan Hoey Road, Dexter, MI 48130, ("Hilltop View" or the "Project").

The Bank has approved the following exceptions to Michigan State Housing Development Authority (MSHDA) normal underwriting standards.



The proposed six-percent vacancy rate is consistent with Avalon's other supportive housing developments and appears to reflect greater Ann Arbor area apartment occupancy.

Ms. Wendy Carty-Saxon
Mr. Masa Nohara
September 26, 2019
Page 2...



The pro-forma operating costs are slightly above MSHDA's regional standards reflecting the Project's providing supportive housing services with their higher management and maintenance costs reflecting the population projected to be housed at the Project.



All Project operating costs utilized for our underwriting were determined using Avalon's experience with similar properties.

I encourage you to give me a call to discuss any and all concerns.

Credit Facility: \$5,300,000 24-month construction loan converting at Project completion to a \$235,000 20-year fully amortizing term loan.

Borrower: Avalon Hilltop View Limited Dividend Housing Association Limited Partnership or such other entity as Avalon Housing will establish to own the Project.

Use of Proceeds: To provide construction and end-loan Project financing.

Collateral: First real estate mortgage covering the Project, assignments of rents and leases, housing contracts, tax credit equity installments, managing member's interest in the limited dividend housing association, reserves, (if allowed by the Michigan State Housing Development Authority), architect agreement, construction contract, management agreement and development and agreement and fee.

Guarantees: Avalon Nonprofit Housing Corporation

1010 South Main Street, Chelsea, MI



(734) 385-1131



jwolfington@csbonline.com

Ms. Wendy Carty-Saxon
Mr. Masa Nohara
September 26, 2019
Page 3...

will guarantee the Credit Facility until it is converted to the permanent loan when the guarantee will be released.

Pricing:

*Construction
Phase:*

The Bank's prime interest rate as it exists from time-to-time.

End-Loan Phase:

A fixed interest rate to be established when the Loan is converted to the end-loan phase. That interest rate will be a minimum of three-percent (3%) more than the Federal Home Loan Bank of Indianapolis (FHLBI) 20-year Community Investment Advance Rate (CICA) subject to a 5-percent (5%) minimum. For indication purposes only, were the Credit Facility to have converted today the fixed interest rate would have been 5.23-percent (5.23%).

Conversion it to occur following the Project's stabilized occupancy achievement.

The CICA interest rates are tailored by the FHLBI to meet the qualifying project specific needs. As conversion from its construction phase nears we will request updated interest rate quotes from the home loan bank.

Facility Fee:

\$26,500 or one-half percent (½%) of the Credit Facility amount.

Maturity/Repayment:

*Construction
Phase:*

Monthly payments of interest only calculated on the amount outstanding under the Credit Facility.



Ms. Wendy Carty-Saxon
Mr. Masa Nohara
September 26, 2019
Page 4...

End-Loan Phase: Monthly payments of principal and interest with all remaining principal and interest due at maturity.

The Credit Facility's payment amount based upon this letter's assumptions would be about \$1,590.

Operating Reserve: Reserves for operations must be funded at Qualified Occupancy and by the time proceeds are advanced under this Credit Facility. Operating reserves must total six-months of operating expenses, replacement reserves and debt service.

Qualified Occupancy is defined at that point in time at which all tax credit units have been occupied by income-eligible tenants.

Replacement Reserve:

The Borrower will be required to fund a replacement reserve of \$300 per unit per year.

Out-of-Pocket Expenses:

The Borrower will be responsible for all out-of-pocket expenses including title insurance and recording costs or fees. Below are the approximate costs/fees associated with the Project.

Title insurance:	\$ 10,360 ^①
Legal fees:	25,000 ^②
Survey (if required):	1,000 ^③
Appraisal fee:	5,000
Recording fees:	60
Flood Zone Certification:	<u>11</u>
Total:	\$ 41,431

① The title insurance estimate was

provided my Absolute Title in Ann Arbor.

② The legal fee estimate was provided by Bruce Elliot with Ann Arbor's Conlin, McKenney and Philbrick and is approximate.

③ The survey estimate was provided by Kem-Tec (Eastpointe and Ann Arbor) and is preliminary.

Prepayment:

Construction
Loan Phase:

None.

End-Loan Phase:

The Credit Facility will be subject to a prepayment penalty the mirrors the FHLBI penalty for early advance repayment.

When we termed out a recent Avalon related end loan we learned that the FHLBI prepayment calculations were extraordinarily complex and instead we imposed a one-percent (1%) per annum penalty. Assuming a 20-year note this results in a 20-percent (20%) prepayment penalty in the first year, a 19-percent (19%) in the second year and so forth.

Operating Account:

The Borrower will be expected to open at Chelsea State Bank its primary operating or other account(s) acceptable to the Bank.

**Environmental
Investigation:**

A Phase I environmental audit will be required. The Borrower will be required to complete the Bank's environmental questionnaire.



Ms. Wendy Carty-Saxon
Mr. Masa Nohara
September 26, 2019
Page 6...

**Conditions
Precedent:**

Among other items, approval of the Credit Facility is conditioned upon receipt and satisfactory Bank review of the following:



A Project appraisal. The final loan amount will be limited to not more than 80-percent (80-percent) of the Project's as stabilized appraised value, as established by a valuation acceptable to the Bank.



Review of the Project's final construction budget and its plans and specifications.



Review of the Project's Phase I Environmental Survey Report.



Permanent financing commitments covering the Project's entire cost other than those costs financed by the Credit Facility end loan.



Subordination of the "developer's profit" in an amount to be determined.



An ALTA Loan Policy of Title Insurance issued by a title company acceptable to the Bank insuring that the Bank is in a first mortgage position.



Ms. Wendy Carty-Saxon
Mr. Masa Nohara
September 26, 2019
Page 7...



All documents, agreements and instruments evidencing the Credit Facility in form and detail acceptable to the Bank.



Participation in the Credit Facility by another acceptable financial institution of not less than \$3,500,000.



All of the Borrower's corporate documentation including items such as LLC Operating Agreement or Corporate By-Laws and Corporate Articles.

Ann Arbor State Bank is our intended participant and its president Peter Schork has verbally indicated his bank will be involved in the transaction at the necessary level, subject to the limit imposed by the Project's appraisal requirement.

**Reporting
Requirements:**



An annual copy of the Borrower's CPA prepared Audit.



An annual copy of the Guarantor's CPA prepared Audit.



During construction, complete draw packages serviced by an acceptable title insurance company including advance request, sworn statement



Ms. Wendy Carty-Saxon
Mr. Masa Nohara
September 26, 2019
Page 8...

and lien waiver. The draws will be serviced by the title insurance company.



During construction third party architect's or engineer's inspections acceptable to the Bank and other funders.



Internally prepared financial statements for the Borrower and/or Guarantor when requested by the Bank.



An annual Project rent role.



Such other records as the Bank may reasonably request.

Cross Lien:

Any of the Borrower's other property in which the Bank has a security interest shall also secure payment of the Credit Facility.

Affirmative Covenants:

The *Loan Documents* will include customary affirmative covenants, including requirements that the Borrower maintain its existence, business operations and adequate insurance and that it pay its taxes.

Default Events:

Customary in credits of this nature, including but not limited to failure to pay principal, interest or fees when due, failure to meet covenants, or representations or warranties false in material nature when made.

Ms. Wendy Carty-Saxon
Mr. Masa Nohara
September 26, 2019
Page 9..

Negative Covenants: The *Loan Documents* will include prohibitions on sales of shares, incurring additional debt, guarantees or liens, using loan proceeds to purchase or carry margin stock or making any advances or investments.

Definitions:

Prime Rate:

The "Prime Rate" is defined as the rate of interest announced or published publicly from time-to-time by the Bank as its Prime Rate of interest, but shall not necessarily be the lowest rate of interest charged by the Bank on commercial loans made by it. Interest will be computed on the basis of a 360-day year and actual days elapsed, and shall fluctuate concurrently with and in an amount equal to each increase or decrease in the Prime Rate.

The Bank's Prime Rate is the same as that listed in the *Wall Street Journal's* "Money Rates" section and is currently five-percent (5.00%).

Governing Law:

The laws of the State of Michigan will govern the *Loan Documents*.

Expiration:

This commitment will expire and be of no force or effect if the Credit Facility described herein is no closed and funded prior to July 31, 2020.

Other Terms and Conditions:

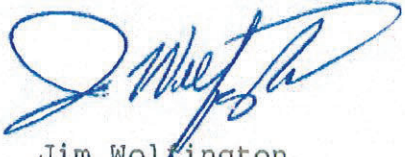
Other terms and conditions will be included in the final loan documents that are not specifically outlined herein.



Ms. Wendy Carty-Saxon
Mr. Masa Nohara
September 26, 2019
Page 10...

I look forward to discussing this proposal's terms at your earliest convenience. I encourage you to call me with any questions, comments or concerns. My direct telephone number is (734) 385-1131, fax number is (734) 385-1931 and email address is jwolfington@csbonline.com.

With best regards,



Jim Wolfington
Vice President

cc: Pat Couture
Mary Lee Penney
Peter Schork A²SB

JLW/



Monday, November 26, 2018

Mr. James Wolfington
Chelsea State Bank
1010 S. Main Street
Chelsea, MI 48118

Project #:	2018A0604
Sponsor Name:	Avalon Nonprofit Housing Corporation
Cosponsor:	
Project Name:	Hickory Way Apartments
Subsidy Request:	\$321,515

Congratulations! The FHLBank Indianapolis Board of Directors approved your application for Affordable Housing Program funds on November 15, 2018. Please take a moment to thoroughly review the information contained in this letter and make note of key dates on your calendar. This grant award may be contingent upon receipt of additional documentation not available when the application was submitted; be alert to any dates specified in the contingency notice included in the Award Kit.

It is very important for the FHLBank Indianapolis to be informed immediately if any project details change. Keep in mind changes that affect scoring, project feasibility, development budget, or other significant changes must be approved by the FHLBank. Finally, this award letter is not a guarantee of funding and development activities should be approached prudently with the commitments set forth in the application observed at every stage in the development process.

Project Number

Please note the project number above. This is the distinct AHP project identifier; it is important to include it on all forms and correspondence to the FHLBank Indianapolis.

Time Limits for Use of Subsidies

With the approval of this award the clock to complete this project has started. Refer to the Implementation Plan for additional information and definitions of a “completed” project. If delays in completing the project within these timeframes becomes apparent, notify the FHLBank Indianapolis immediately.

- ▶ First disbursement must be requested on or before December 1, 2019
- ▶ Utilization of ALL AHP funds by December 1, 2020
- ▶ Construction completion of entire project must be completed by December 1, 2021

For projects receiving readiness to proceed points, the construction completion timeline is accelerated to December 1, 2020.

Key Dates and Reporting Timeline

December 14	Award Kits available on FHLBI secure portal On demand training – FHLBI secure portal
January 23, 2019	Member Training – AHP Grant Administration – Webinar (register on FHLBI Website)
January 24, 2019	Sponsor Training – AHP Grant Administration – Webinar (register on FHLBI Website)
January 31, 2019	Signed AHP Agreements/Schedule to the Agreements due to FHLBank Indianapolis
June 1, 2019	Semi – Annual progress report due to FHLBank Indianapolis
December 1, 2019	(Due every 6 months until the project is reported complete)

AHP Agreements/Terms and Conditions Statement

The approval of your AHP application was based on the project’s compliance with the Regulation (§12 CFR Part1291) and the commitments set forth in the AHP application. This information is summarized in the Schedule to the Agreement that is signed and attached to the Affordable Housing Program Agreement. Disbursement requests may be submitted after a fully executed AHP Agreement has been received.

AHP Award Kit

An electronic Award Kit and user account set up for the member and sponsor contact identified in the AHP application is currently in process. The Award Kit will include: The Affordable Housing Program Agreement, Schedule to the Agreement outlining points awarded under each scoring criteria, Award Contingencies and Funding Conditions notification as applicable, as well as other grant administration materials and documents.

Secure Portal Access

Documents and compliance reporting for this AHP grant will be shared between Member and Sponsor partners and the FHLBank Indianapolis using a secure portal. Individual accounts are established for the contacts identified in the AHP application. Over the first two weeks in December, user account credentials will be provided through communication from two email addresses: 1) servicedeskplus@fhlbi.com and 2) servicedesk@fhlbi.com.

After your account information has been validated, a user guide and link to a short training video will provide detail on how to navigate and use the secure portal. Here is what to look for when logging in for the first time:



The FHLBank Indianapolis and Community Investment staff look forward to assisting you to a successful completion of this project. If we may be of assistance, please contact me at: 1-800-688-6697. Again, congratulations on your award!

Sincerely,

Trish Lewis
VP, AHP Portfolio Manager

cc: Ms. Wendy Carty-Saxon, Avalon Nonprofit Housing Corporation

10

L: 5129 P: 532 6296200 AG

12/23/2015 09:49 AM Total Pages: 27
Lawrence Kestenbaum, Washtenaw Co



Time Submitted for Recording
Date 12-22 2015 Time 11:30 AM
Lawrence Kestenbaum
Washtenaw County Clerk/Register

REGULATORY AGREEMENT

13

THIS REGULATORY AGREEMENT, made and entered into as of December 11th 2015 between **ARBORDALE APARTMENTS 2014 LIMITED DIVIDEND HOUSING ASSOCIATION LIMITED PARTNERSHIP**, a Michigan limited partnership (the "Mortgagor"), whose address is 1327 Jones Dr., Suite 102, Ann Arbor, MI 48105, and the **MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY**, a public body corporate and politic of the State of Michigan (the "Authority"), whose address is 735 East Michigan Avenue, P.O. Box 30044, Lansing, Michigan 48909.

R E C I T A L S:

A. The Mortgagor is the owner in fee simple of the real property described in Exhibit A attached to and made a part of this Agreement (the "Property").

B. The Mortgagor has applied to the Authority for a mortgage loan in the amount of \$625,010 (the "First Mortgage Loan"), to aid the Mortgagor in the financing of a housing development for persons of low and moderate income, to be known as ARBORDALE APARTMENTS, MSHDA Development No. 1425-2 (which development, including the Property and all assets of whatever nature owned by the Mortgagor and used in the business conducted on the Property, is referred to as the "Development").

C. The Mortgagor has also applied to the Authority for a loan in the amount of \$299,343 (the "Preservation Fund Loan") to assist in financing the acquisition and construction or rehabilitation of the Development.

D. The Mortgagor has also applied to the Authority for a loan in the amount of \$897,500 (the "HOME Loan") to be funded by the Authority acting on behalf of the State of Michigan as the Participating Jurisdiction under the HOME Investments Partnership Program (the "HOME Program") funded by the U.S. Department of Housing and Urban Development ("HUD") to assist in financing the acquisition and construction or rehabilitation of the Development.

E. As a condition of making the HOME Loan to the Mortgagor, the Authority and the Mortgagor have entered into a HOME Written Agreement dated December 11, 2015 which agreement complies with the requirements of 24 CFR §92.504 for written agreements (the "HOME Written Agreement").

F. The First Mortgage Loan is evidenced by a Mortgage Note (the "First Mortgage Note") and secured by a Mortgage (the "First Mortgage") to be recorded against the Development; the Preservation Fund Loan is evidenced by a Preservation Fund Loan Mortgage Note (the "Preservation

678698.BH First American Title

14



Legal 013 – Taxable + HOME
12/09; 03/15)

Time Submitted for Recording
Date 12-17 2015 Time 10:50 AM
Lawrence Kestenbaum
Washtenaw County Clerk/Register

6296200 L: 5129 P: 532 AG 12/23/2015 09:49 AM Page 2 of 27

Fund Loan Note") and secured by a Preservation Fund Loan Mortgage (the "Preservation Fund Loan Mortgage") to be recorded against the Development; and the HOME Loan is evidenced by a HOME Mortgage Note (the "HOME Note") and secured by a HOME Mortgage (the "HOME Mortgage"), also to be recorded against the Development.

G. The Authority is unwilling to make the First Mortgage Loan, the Preservation Fund Loan or the HOME Loan unless the Mortgagor agrees to be regulated in the manner set forth in this Agreement, and the Mortgagor is willing to execute and abide by this Agreement as a condition of obtaining the First Mortgage Loan, the Preservation Fund Loan and the HOME Loan (which together may be referred to as the "Mortgage Loans").

H. The environmental review required under the National Environmental Policy Act of 1969 (42 U.S.C. 4321 *et seq*) and 24 CFR Part 58 has been completed and HUD form 7015.16 authorizing the use of HOME funds at the Development has been issued or the Authority has determined that the Development is categorically exempt from further environmental review in accordance with the provisions of 24 CFR 58.34(a)(12).

NOW, THEREFORE, it is agreed by and between the parties to this Agreement as follows:

1. Payment of Mortgage Loans. Mortgagor shall promptly make all payments due under the First Mortgage Note, the Preservation Fund Loan Note and the HOME Note, and will perform all obligations under the First Mortgage, the Preservation Fund Loan Mortgage and the HOME Mortgage, which are incorporated herein by reference.

2. HOME Program Requirements. The Mortgagor agrees to comply with the HOME Written Agreement and the other requirements of the HOME Program, as contained in Title 24, Part 92, Code of Federal Regulations (24 CFR §92.1, *et seq*, referred to herein as the "HOME Regulations"), for the period of affordability for the Development. The period of affordability for the Development shall be fifteen (15) years, beginning after "project completion" (the "Period of Affordability"), which is defined by 24 CFR §92.2 as the date upon which all of the following have been satisfied: (a) all requirements necessary for the transfer of title and completion of construction have been performed; (b) the Development complies with all applicable HOME requirements, including the property standards contained in 24 CFR §92.251; (c) the final draw of HOME funds in connection with the construction of the Development has been made; and (d) the Development's completion information has been entered in the disbursement and information system established by HUD. Thirty-eight (38) units within the Development shall be deemed "HOME-Assisted Units." The HOME-Assisted Units will be "floating" units, as defined in 24 CFR §92.252 (j). All HOME-Assisted Units must meet the affordability requirements of 24 CFR §92.252 or 24 CFR §92.254, as applicable, for the entire Period of Affordability or a Recapture Obligation (as defined in Section 33 below) will arise.

3. Occupancy Qualifications Based on Income.

a. **Program Restrictions.** Thirty-nine (39) of the units in the Development (thirty-four 1-bedroom and five 2-bedroom) (the "Fifty Percent Units") must be occupied or available for occupancy by households whose incomes do not exceed the 50% of area income limit for Multifamily Tax Subsidy Projects as determined by HUD with respect to projects financed pursuant to Section 142(d) of the Internal Revenue Code of 1986, as amended (the "Code"), as amended by the Housing and Economic Recovery Act of 2008 (P.L. 110-289) ("MTSP Limits"), adjusted for family size. These restrictions shall remain in effect for the longest of (i) so long as any of the Mortgage Loans are outstanding, (ii) the extended use period (the "Extended Use Period") for the Development as defined in

Legal 013 – Taxable + HOME
(12/09; 03/15)

- 2 -

41. **No Assignment Without Approval.** The Mortgagor shall not transfer, assign, or pledge any right or interest in, or title to, any funds deposited by the Mortgagor with the Authority, or reserved by the Authority for the Mortgagor, without the prior written approval of an Authorized Officer of the Authority. As used in this instrument, the term "Authority" shall be deemed to include any persons to whom the Mortgage Note and Mortgage may be assigned.

IN WITNESS WHEREOF, the parties have caused this Regulatory Agreement to be executed by their duly authorized representatives as of the date stated above.

ARBORDALE APARTMENTS 2014
LIMITED DIVIDEND HOUSING
ASSOCIATION LIMITED PARTNERSHIP, a
Michigan limited partnership

By: Arbordale Apartments 2014 Inc.
Its: General Partner

By: *Wendy Carly-Saxon*
Wendy Carly-Saxon
Its: Treasurer

STATE OF MICHIGAN)
COUNTY OF Ingham) ss.

The foregoing Regulatory Agreement was acknowledged before me in Ingham County, Michigan, this 11th day of December, 2015, by Wendy Carly-Saxon, as the Treasurer of Arbordale Apartments 2014 Inc., a Michigan corporation, as the general partner of Arbordale Apartments 2014 Limited Dividend Housing Association Limited Partnership, a Michigan limited partnership, on behalf of said partnership.

DELANEY RAE DUCKHAM
NOTARY PUBLIC - STATE OF MICHIGAN
COUNTY OF EATON
My Commission Expires June 28, 2020

Delaney R Duckham
Notary Public, Eaton County, MI
My Commission Expires: 6-28-2020
Acting in the County of Ingham

MICHIGAN STATE HOUSING
DEVELOPMENT AUTHORITY

By: *Willard G. Moseng*
Willard G. Moseng
Its: Deputy Director of Legal Affairs

STATE OF MICHIGAN)
)ss.
COUNTY OF INGHAM)

The foregoing Regulatory Agreement was acknowledged before me in Ingham County, Michigan, this 11th day of December, 2015, by Willard G. Moseng, Deputy Director of Legal Affairs of the Michigan State Housing Development Authority, a public body corporate and politic of the State of Michigan.

DELANEY RAE DUCKHAM
NOTARY PUBLIC - STATE OF MICHIGAN
COUNTY OF EATON
My Commission Expires June 26, 2020

Delaney Rae Duckham
Notary Public, Eaton County, MI
My Commission Expires: 6-26-2020
Acting in the County of Ingham

DRAFTED BY AND WHEN RECORDED
PLEASE RETURN TO:

Laurie Kelly (P66976)
Michigan State Housing Development Authority
735 E. Michigan Ave.
P.O. Box 30044
Lansing, Michigan 48909

DELIVERY ASSURANCE CERTIFICATE

THIS DELIVERY ASSURANCE CERTIFICATE ("Certificate") dated as of the Effective Date, is made by Pear St. Apartments Limited Dividend Housing Association Limited Partnership, a Michigan limited partnership, together with its permitted successors and assigns ("Borrower") and delivered to Capital Fund Services, Inc., a Michigan nonprofit corporation, whose address is 1000 South Washington, Suite 200, Lansing, Michigan 48910 (together with its successors and assigns "CFS").

RECITALS

A. CFS has issued a commitment, dated November 24, 2008 ("Permanent Mortgage Loan Commitment"), to make a permanent mortgage loan ("Mortgage Loan") to the Borrower, in an original principal amount not to exceed \$233,065 ("Maximum Mortgage Loan Amount"), to provide permanent mortgage financing for a multifamily housing project known as Pear Street Apartments, located in Ann Arbor, Michigan ("Project").

B. As more particularly described in the Permanent Mortgage Loan Commitment, CFS's obligations under the Permanent Mortgage Loan Commitment are subject to various conditions including (1) completion of construction or rehabilitation of the Project in accordance with the approved plans and specifications and (2) lease-up and stabilization of the Project at not less than 90% occupancy at underwritten rents and expenses for three consecutive calendar months ("Minimum Occupancy Requirement") unless waived by CFS, both conditions to be satisfied on or before November 30, 2010, or any later date as extended by CFS ("Final Delivery Date").

C. In consideration of CFS's agreement to lock the interest rate on the Mortgage Loan upon Borrower's acceptance of the Permanent Mortgage Loan Commitment ("Confirmation of Note Rate"), CFS requires that the Borrower execute and deliver this Certificate, together with a mortgage ("Security Instrument") securing the Borrower's obligations under this Certificate.

D. All terms used in this Certificate and defined in this Certificate or in any of the attached Exhibits shall have the meanings so given.

In consideration of the above recitals and the promises contained in this Certificate, the receipt and sufficiency of which are acknowledged, the Borrower agrees as follows:

SECTION 1. Borrower's Agreement to Close Mortgage Loan. In consideration of CFS's Permanent Loan Commitment and Confirmation of Note Rate, the Borrower agrees to close the Mortgage Loan with CFS ("Mortgage Loan Closing") not less than two business days prior to the Final Delivery Date on the terms set forth in the Permanent Mortgage Loan Commitment as such terms may be changed in accordance with Section 2 and for the amount for which the Mortgage Loan underwrites at the time of the Permanent Loan Closing as determined by CFS.

SECTION 2. Borrower Acknowledgements. The Borrower acknowledges and agrees that:

CFS shall have the right, from time to time, to:

- (1) extend the Final Delivery Date;
- (2) lessen the Minimum Occupancy Requirement by the percentage of occupancy, the type of occupancy or the time period over which the occupancy requirement must be met; and
- (3) waive any condition to the closing or delivery of the Mortgage Loan or any term or condition of the Permanent Mortgage Loan Commitment or to otherwise lessen any standard of performance or achievement required of the Property or the Borrower or any Key Sponsor of the Borrower as a condition to the closing or delivery of the Permanent Mortgage Loan under the Permanent Mortgage Loan Commitment as it may deem fit in its sole discretion;

and the Borrower shall remain obligated to close the Mortgage Loan as set out in Section 1.

SECTION 3. Delivery Assurance.

(a) **Delivery Assurance Fee.** The Borrower agrees to pay to CFS a fee calculated in accordance with Exhibit A ("**Delivery Assurance Fee**") on the Determination Date if:

- (1) the Mortgage Loan does not close on or before the Final Delivery Date due to a Default Event; or
- (2) CFS terminates the Forward Commitment in accordance with its terms before the Final Determination Date due to a Default Event; or
- (3) the Mortgage Loan does not close on or before the Final Delivery Date for any reason other than a Default Event if the Mortgage Loan underwrites at the time of the Permanent Loan Closing, as determined by CFS, for not less than 95 percent of the Maximum Mortgage Loan Amount, provided, however, that in no case shall the Borrower owe a Delivery Assurance Fee under this paragraph (3) if the Mortgage Loan does not close due principally to:

(A) the material failure of any party, other than Borrower, to perform its obligations under the Project's construction loan, or the Permanent Mortgage Loan Commitment; or

(B) an act of God, including flood, fire, lightning, or earthquake, or any explosion, act of public enemy, war, revolution, riot, governmental restraint, embargo or other cause that is not within the control of Borrower.

(b) **Reasonable Estimates.** The Borrower recognizes that the occurrence of any event which gives rise to the payment of a fee under this Section will result in CFS incurring additional expenses, loss to CFS in not being able to originate the Permanent Loan and frustration or impairment of CFS's ability to meet its commitments to third parties. The Borrower agrees that, in the event of any such event, CFS and its third parties shall be entitled to damages for the detriment caused thereby, but that it is extremely difficult and impractical to ascertain the extent of such damages. The Borrower therefore acknowledges and agrees that the compensatory fees referred to in this Section represent reasonable estimates of such damages to CFS. The Borrower further acknowledges that this provision is a material part of the consideration for the Permanent Mortgage Loan Commitment and the Confirmation of Note Rate.

(c) **Definitions.** As used in this Section, the following terms shall have the corresponding meanings:

“**Default Event**” means either that:

(i) the Borrower has failed to take all actions within its power or ability to enable CFS, by the Final Delivery Date, to determine that the Mortgage Loan is eligible for origination in accordance with CFS's underwriting guidelines (attached to this Certificate as Exhibit B) (as such requirements may be waived or lessened by CFS in accordance with Section 2); or

(ii) CFS has determined that the Mortgage Loan is so eligible for origination by CFS, but the Borrower fails to close the Mortgage Loan by the Final Delivery Date.

“**Determination Date**” means the date on which any Delivery Assurance Fee is payable by the Borrower. The Determination Date shall be the first to occur of (a) the date the Permanent Mortgage Loan Commitment is actually terminated, if the Permanent Mortgage Loan Commitment terminates in accordance with its terms, (b) the Final Delivery Date, if the Permanent Mortgage Loan Commitment expires and (c) the date of the Mortgage Loan Closing.

(d) **Savings Provision.** Nothing in this Section 3 shall be interpreted to allow the Borrower to avoid its obligation to close the Mortgage Loan as required by Section 1.

SECTION 4. Interest. The Borrower agrees to pay interest on the unpaid balance of any fee which becomes due under this Certificate from the Determination Date to the date it is paid in full at the per annum rate of the Prime Rate plus two percentage points, or, if less, the highest maximum rate permitted to be charged by applicable law. The term “Prime Rate” means an annual rate of interest equal to the prime rate of interest as reported from day to day in The Wall Street Journal (notwithstanding that such publication shows the prime rate of interest for the preceding Business Day) as the base rate on corporate loans posted by at least 75 percent of the nation's 30 largest banks, or, if such rate is no longer available, then the base rate or prime rate of interest of any “Money Center” bank designated from time to time by CFS, in its discretion. Any change in the interest rate under this Certificate due to a change in the prime rate

of interest as reported in The Wall Street Journal shall take effect on the date of publication. Interest shall be computed on the basis of a 360-day year and twelve 30-day months.

SECTION 5. Additional Security. As security for the performance of the Borrower's obligations under this Certificate, the Borrower has delivered to CFS the Security Instrument to be filed of record against the Project.

SECTION 6. Remedies. Should any fee become payable under Section 3 and not be paid when due, CFS shall have the right to take such action at law or in equity, without notice or demand, as it deems advisable to protect and enforce the rights of CFS against the Borrower and/or in and to the Project and to exercise any and all rights and remedies available to it under this Certificate and the Delivery Assurance Security Instrument.

SECTION 7. No Remedy Exclusive. Each right, power and remedy of CFS under this Certificate or under applicable laws shall be cumulative and concurrent, and the exercise of any one or more of them shall not preclude the simultaneous or later exercise by CFS of any or all such other rights, powers or remedies. No failure or delay by CFS to insist upon the strict performance of any one or more provisions of this Certificate or to exercise any right, power or remedy under this Certificate constitute a waiver thereof or preclude CFS from exercising any such right, power or remedy. In order to entitle CFS to exercise any remedy reserved to CFS, it shall not be necessary to give any notice.

SECTION 8. Limits on Personal Liability. CFS's only recourse for the satisfaction of the indebtedness evidenced by this Certificate and the performance of any other obligations of the Borrower under this Certificate or the Security Instrument securing this Certificate shall be CFS's exercise of its rights and remedies with respect to that certain real property and the other property described as security in the Security Instrument.

SECTION 9. Successors and Assigns Bound. This Certificate shall be binding upon the Borrower and its successors and assigns, and shall inure to the benefit of and may be enforced by CFS and its successors, transferees and assigns. The Borrower shall not assign any of its rights and obligations under this Certificate without the prior written consent of CFS.

SECTION 10. Entire Agreement; Amendment and Waiver. This Certificate, together with the attached Exhibits, contains the complete and entire understanding of the Borrower with respect to the matters covered and no change or amendment shall be valid unless it is made in writing and executed by the Borrower with the written consent of CFS. No specific waiver of any of the terms of this Certificate by CFS shall be considered as a general waiver.

SECTION 11. Notices. All notices given under this Certificate shall be in writing to the other party, at the address and in the manner set forth in the Security Instrument.

SECTION 12. Severability. The invalidity, illegality, or unenforceability of any provision of this Certificate pursuant to judicial decree shall not affect the validity or enforceability of any other provision of this Certificate, all of which shall remain in full force and effect.

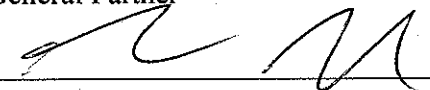
SECTION 13. Applicable Law. This Certificate shall be governed by and construed in accordance with the laws of the jurisdiction in which the Project is located.

SECTION 14. Acceptance. The Borrower waives any requirement that CFS accept or give notice of acceptance of this Certificate.

This Certificate is executed by the undersigned as of the ___ day of December, 2008 (“**Effective Date**”)

PEAR ST. APARTMENTS LIMITED
DIVIDEND HOUSING ASSOCIATION
LIMITED PARTNERSHIP

By: Pear St. Apartments, Inc.
Its: General Partner

By: 

Its:

Exhibit A

Delivery Assurance Fee

The Delivery Assurance Fee will be an amount equal to the greater of:

- (1) 2% of the Maximum Mortgage Loan Amount; OR
- (2) an amount calculated by multiplying:
 - the difference between (i) the interest rate that was scheduled to become effective on the Mortgage Loan upon the Final Delivery Date and (ii) the yield rate ("Yield Rate") of the U.S. Treasury security selected by CFS whose maturity is closest to the maturity of the Mortgage Loan, as the Yield Rate is reported in *Barron's Magazine* on the Determination Date plus 2%; multiplied by
 - the Maximum Mortgage Loan Amount; multiplied by
 - a present value factor, calculated using the following formula:

$$\frac{1 - (1+r)^{-n/12}}{r}$$

- where:

r = the Yield Rate; and

n = the number of months remaining between the Determination Date and the end of the selected Yield Maintenance Period (which shall include the term of any extensions granted under the terms of the Permanent Loan Commitment);

As used herein "Yield Maintenance Period" means the period commencing on the date of this Certificate and ending at the end of the Yield Maintenance Period specified for the Mortgage Loan in the Forward Commitment.

Exhibit B

CFS's Closing Underwriting Guidelines

Closing Underwriting

For forward commitments, the property must be re-underwritten after the project has achieved a minimum of 90% physical occupancy for a minimum of three consecutive month ends. Before converting the forward commitment mortgage CFS will perform a physical inspection of the Property to verify that: (i) there is no deferred maintenance; (ii) necessary capital improvements have been made; and (iii) the general management and operations are acceptable and reflective of a stabilized project. CFS's inspection should occur no more than 90 days prior to the date of conversion. The inspection should cover a review of tenant files to ensure that the lease rent matches the rent on the financial statements and that proper tenant income verification procedures are being followed.

CFS must perform an Income and Expense Analysis to determine if there is sufficient NOI to cover the mortgage loan at underwritten DSC. In the event that NOI is not sufficient to cover the underwritten DSC, the mortgage amount should be reduced to an amount that can be supported by the NOI. The NOI used to determine the mortgage amount at conversion can be different from the annualized NOI if CFS makes adjustments to the financial statements as discussed below.

Income

Should be adjusted to exclude unusual income (e.g., temporary or nonrecurring income) and the value of any unreflected concessions. Adjustments made by the Lender would be warranted for:

- (a) any type of income that was not allowed or recognized in the original underwriting;
- (b) the effect of using the three months annualized income if such period reflects positive income impact from seasonal variations that are not reflective of the Property's year-round performance;
- (c) nonmonetary or other concessions (the pro rata value of the concession should be deducted from the monthly rent attributable to any unit for which the concession has been made).

Expenses

The total expense figure that should be reasonable, as should the individual, line-item expense figures on which the total expense figure is based. CFS will ensure that all appropriate types of expenses, including deposits to the Replacement Reserve or the underwriting allowance for such deposits, are included, and that any inappropriate types of expenses (e.g., capital improvement costs, repair costs covered by funds set aside under a Completion/Repair Agreement, partnership costs, etc.) are excluded. The expense figures used for this purpose should be reflective of stabilized operating conditions, and should not be unusually understated due to efficiencies or savings that could not be replicated by a different owner or manager, or that would not be recognized for underwriting purposes. On the other hand, the Borrower should not be penalized for start-up costs that are nonrecurring or capital costs or because the original underwriting expense projections were too conservative.

To derive a reasonable total expense figure, CFS will perform a line-by-line expense analysis, which should include a comparison of the original underwriting expense estimates with the actual expense figures shown on the Borrower's financial statements for the three months of stabilized occupancy. CFS will determine for each expense line item whether the current circumstances of the Property and the passage of time warrant an upward or downward trend adjustment to the original underwriting estimate. For each expense item, CFS will compare the annualized actual expense figures and the original underwriting and the end of the period covered by the financial statements; and the following specific guidance:

- (a) Management Fee — The percentage of Effective Gross Income attributed to the management fee should be the same as in the original underwriting, unless the actual percentage is higher and is reflective of both the market and stabilized operations.
- (b) Insurance — The actual cost of all required types of insurance coverage should be used.
- (c) Real Estate Taxes — The actual real estate taxes should be used. In the event that the property has not received its first tax bill, the taxes should be based on the assessment and the millage rate. It is generally unusual for a property to not yet have been assessed but if the property has not been assessed then underwritten taxes should be used for closing.
- (d) Utilities, Water and Sewer — Should be based on actual costs, taken into consideration seasonal variances such as the three months of stabilized occupancy are November through January in which case annualized electricity usage would probably be understated due to no air conditioning being used but gas heat (if applicable) would be overstated on an annualized basis.
- (e) Replacement Reserve — Use underwritten replacement reserve amounts.
- (f) Other Expenses (e.g., Repairs and Maintenance, Payroll, Administration, etc.) — Trending determinations relating to items other than those noted above will tend to be more subjective; i.e., they will require CFS to use its best judgment, based on such factors as the actual expenses submitted by the Borrower, and other available information pertaining to the performance trends of the Property.



Fee Proposal

For RFP# AAHC-21-A for Co-Developer Proposal for 121 E. Catherine

Submitted by: Avalon Housing, Inc.

We are proposing the following fees associated with our 121 E. Catherine submission:

Developer Fee

Upon consideration of the significant and lead role we would be taking during the development process and through to issuance of the 8609s, Avalon is proposing a division of developer fee with Avalon receiving 80% and the Ann Arbor Housing Commission receiving 20%.

We propose that these percentages would be reflected at each developer fee payout. Our recent deals have paid out 25% of the realized developer fee at closing, 25% at construction completion, 40% at project stabilization and 10% at issuance of K1 tax returns. We anticipate a similar structure here and would have 80%/20% percentages distributed at each payout benchmark.

As a 9% LIHTC development, the project would be eligible for a total developer fee of \$1,500,000.

We propose the deferred fee would be handled similarly, with the distributions timing and terms consistent with the agreed upon Limited Partnership Agreement. We anticipate the timing of these distributions will be each year after that year's audit has been completed.

Cash Flow

As the Ann Arbor Housing Commission will be providing property management, we would anticipate a reverse of these percentages for cash flow throughout operations, with the Ann Arbor Housing Commission receiving 80% of the cash flow and Avalon receiving 20%.

The cash flow calculations would follow the waterfall as it is agreed upon in the Limited Partnership Agreement. We would anticipate cash flow distributions being made after each year after the relevant audit has been completed.



Incentive Management Fees

We also are open to an Incentive Management Fee with distribution to the Ann Arbor Housing Commission, with the amount to be negotiated. This would also get paid out after each year's audit.

Proposed Fees for other team members:

- **Architecture Fees:** Architectural fees are proposed at roughly 5.5% of construction costs. The Architectural fees, including their Mechanical, Electrical Plumbing, Fire Protection and Structural Engineers, is currently anticipated to be \$845,000.
- **General Contractor Fees:** General Contractor fees are proposed consistent with MSHDA LIHTC standards: 6% for General Conditions; 2% for Overhead; and 6% for Profit. Based on the currently projected construction costs, these total to \$1,978,201. The percentages are proposed to remain at 6/2/6 and the final total General Contractor Fees would adjust based on the final construction costs.
- **Civil Engineering.** Civil Engineering costs are proposed at \$40,000 for site planning and construction docs. There would be additional fees related to extending the water main, but those are not reflected here, as we anticipated they would be covered as part of the underground infrastructure done outside of this proforma.
- **Green Consultant:** Green consulting costs, for Enterprise Green Communities Plus, and striving toward meeting Passive Housing-type standards are estimated at approximately \$75,000.