

Madison Apartments III



(view from back of property)

Response to: City of Peoria Request for Proposals
HOME Investment Partnerships Program (HOME)
September 2022

Respondent: Phoenix Community Development Services
for Madison Apartments III
Christine Kahl – President/CEO
309.222.2560
director@phoenixcds.org



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2020 City of Peoria Letter of Intent Cover Sheet

Applicant (Organization/Agency)

Organization / agency legal name: Phoenix Community Development Services
Contact person / title: Christine Kahl, President and CEO
Address: 202 NE Madison Avenue, Peoria, IL 61602
Telephone: (o) 309.222.2560 / (c) 309.712.5644
Email: director@phoenixcds.org
Website: www.phoenixcds.org

Funding Requested

HOME Requested Amount:	\$ 600,000
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Estimated Total Project Budget

Total Project Budget	\$ 4,963,930
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Short project description and proposed use of HOME funds within the project. The project must be a new construction project for housing for individuals experiencing homelessness.

Located in downtown Peoria, Madison Apartments III will provide much-needed permanent housing and supportive services for homeless youth between 18 and 24-years-old, many who are aging out of the care of the Illinois Department of Children and Family Services (DCFS). The 16-unit project is sponsored by Phoenix Community Development Services (Phoenix CDS) (formerly South Side Office of Concern) and will have 9 studio units and 7 1-br units, all at 30% AMI. The project will be new construction. Part of the foundation of an existing building on-site will be left in place and utilized in the construction of the new building. The development will be 4 stories with service spaces and common area on the first floor and residential on 2nd-4th floors. Madison III will be located next to two other Phoenix developments, creating a campus effect overall. Phoenix Community Development Services respectfully requests \$600,000 in HOME funds. The City of Peoria HOME funds are necessary in order to fill the gap left by increasing construction materials costs.

Applicant Agency Information

Date of incorporation:	3/7/1985	Federal Employer Identification #:	37-1173520
City of Peoria EEO #	00706-2212321 (exp 12/2022)	SAMs Cage Code # and expiration	567L9 (expires June 2023)
Agency UEI Number:	JH7PUPFUEBB2	Agency Annual Operating Budget:	\$4,255,274 (excluding capital funds)
Number of Paid Staff:	47 (includes open positions)	Number of Volunteers:	10 (combined positions)



Conflict of Interest

As an applicant requesting funding, will any of your employees, agents, consultants, officers, or elected officials experience the following conflicts of interest:

Participate in the decision making process for the approval of this application? (i.e., City of Peoria City Council or Community Development Grants Division Staff member) No Yes

Have a personal financial interest or reap a financial benefit from this program/activity? No Yes

Have an interest in any contract, subcontract, or agreement with respect to this application either for themselves or those with whom they have family or business ties during the program year and for one year thereafter?
No Yes

*If you selected yes to any of the above, clearly describe the conflict below.

Certification

I certify that the information contained in this application is true and correct and that it contains no misrepresentations, falsifications, intentional omissions, or concealment of material facts and that the information given is true and complete to the best of my knowledge and belief. I agree to comply with all CDBG, HOME, and City of Peoria requirements if funded. Submission of an application does not guarantee funding.

<i>Christine Eskel</i>	<i>Christine Eskel</i>	9/1/2022
Agency CEO Name	Signature	Date

Project Description

Project Name: Madison Apartments III

Project Address: 206 NE Madison Ave, Peoria IL 61602 - (see attached [Exhibit A – Site Location Maps](#))

Applicant/ Developer/Property Manager/Service Provider: Phoenix Community Development Services (Phoenix CDS)

Owner Entity: Madison Apartments III, LLC

Total Project Units: 16 units - 100% Permanent Supportive Housing (PSH)

Target Population: Homeless, older youth aged 18-24, many who are aging out of the DCFS system

IHDA Long-Term Operating Support LTOS Rental Assistance: 7 units of LTOS assistance

Additional Rental Subsidy: 9 units of assistance through Master Lease with the Children's Home Association of Illinois

Building Type: New construction, 4-story building

Unit Mix: All units will have subsidy through either IHDA's LTOS program or operating subsidy through CHAIL

Affordability	Bedroom/ Bathroom	# of Units
30% AMI PSH CHAIL Rental Subsidy	Studio / 1 Bath	5
30% AMI PSH LTOS	Studio / 1 Bath	4
30% AMI PSH CHAIL Rental Subsidy	1 Bed/ 1 Bath	4
30% AMI PSH LTOS	1 Bed/ 1 Bath	3
Total Units:		16

Overview

The proposed Madison Apartments III project will provide 16 units of much-needed housing and supportive services for homeless, older youth between ages of 18 and 24, many of whom are exiting the Illinois DCFS system. The 16-unit PSH project is sponsored by Phoenix Community Development Services (Phoenix CDS), the largest supportive housing and homeless services provider in the Tri-County region. This project would be the culmination of a long-term effort on the part of the Home for All Continuum of Care, Phoenix CDS and its partners to provide targeted housing assistance to young people aging out of the child welfare system and who are at extreme risk of experiencing homelessness or who are already homeless.

The proposed Madison Apartments III site is located in downtown Peoria and currently contains one single-story building used as office space, which will be demolished, and this will be a new construction project. The final product will be a 4-story building with 9 studio units and 7 one-bedroom units of PSH. 100% of units will be at 30% AMI.

The ground floor of the structure will include a recreational activity room focusing on fine arts and other therapeutic recreational activities designed to foster positive social interaction and other life skills, supportive services office, a computer lounge, as well as laundry. Floors two, three, and four will be residential. There will be an outdoor performance patio for the residents to use for arts and entertainment activities as well as other special events. Located in proximity to Phoenix CDS's other PSH sites downtown, including its Workforce Development Center, the addition of this project will create a campus effect for the organization and its housing while also providing access to supportive services within 2 blocks of the project.

Please see the attached renderings of the building, including a front-facing view of the building from Madison Avenue and two renderings of the outdoor oasis area in the back of the building (Exhibit B).

Target Population and Services

The target population for Madison Apartments III is homeless youth between 18 and 24-years-old, many who are aging out of the child welfare system, DCFS, or have recently exited the system. While some youth who emancipate from state care are resilient and capable, statistics show that without help, they are more likely than their peers to be homeless, unemployed, or incarcerated. These young adults are more likely to have significant mental and/or other behavioral health issues than other young adults. Many will face challenges with relationships, family planning, and achieving stability. These youth have limited access to affordable housing and employment opportunities that offer a living wage. The National Youth in Transition Database surveys youth in foster care at age 17 and every 2 years post-exit from foster care until age 23; 43% of the 5,583 youth who completed all three waves of the survey reports having had a homeless experience by age 21 (at either age 17, 19, or 21). The Voice of Youth Count, a national survey of unaccompanied youth ages 13 to 25 who have experienced some

form of homelessness or housing instability found that nearly one third of the youth had experienced some form of involvement with the child welfare system in their lives.

Recognizing the growing homeless youth population in the region, the Home for All Continuum of Care, the Peoria Housing Authority, and DCFS became the first fully implemented HUD Foster Youth to Independence site in Illinois ([Exhibit C - HUD Foster Youth to Independence Fact Sheet and executed MOU attached](#)) in 2020. The Foster Youth to Independence initiative aims to help communities increase housing options for youth with a current or prior history of child welfare involvement that are homeless or at risk of homelessness and to contribute to the federal goal of preventing and ending youth homelessness outlined in the Federal Strategic Plan to Prevent and End Homelessness. Phoenix CDS' role of identifying eligible youth through its homeless outreach services and placing these youth on the CoC's Coordinated Entry Wait List has further highlighted the need for a dedicated program to target the unique needs of this population. The Fostering Youth to Independence emphasizes the need for a prioritization strategy that ensures youth are prioritized for housing resources and related services based on **need AND appropriateness of intervention**.

This project will bring the innovative partnership between the Home for All CoC, Peoria Housing Authority, Phoenix CDS and DCFS to a higher system capacity by providing dedicated PSH and allowing for the social services offered at Madison Apartments III to be directly tailored to address the unique barriers faced by older youth population specifically. Phoenix CDS is a licensed mental health agency and a leader in the field of permanent supportive housing for persons with mental illness in Illinois, and will offer comprehensive supportive case management, access to appropriate clinical services (i.e., mental health counseling), and access to supportive housing for this population through this project. Partnering with DCFS and the largest local child welfare agency, Children's Home Association of Illinois (CHAIL) will allow this project to offer an additional level of coordination for its residents. It will serve to reduce and prevent older youth homelessness in the area and ensure that they have the support needed to successfully transition out of state care and into adulthood.

Energy Efficiency Measures/ Green Design

The proposed Madison III Apartments in Peoria will utilize numerous sustainable design techniques to reduce energy consumption, reduce environmental pollution, and increase indoor air quality. These features will combine to create an exceptional living environment for the residents and contribute to the ongoing sustainability of the larger community. Also, with the significant emphasis on energy efficiency in insulation and mechanical systems, it is anticipated that utility bills will be lower in comparison to other similar buildings that do not employ the same level of design features. The sustainable design features will include:

1. Site Sustainability

- Build on a previously developed site, conserving land resources and re-using infrastructure.

- Build to a high density, again conserving valuable land resources.
- Build on a site that with proximity to several bus routes, thereby providing opportunity for public transit access.
- Provide native plantings that are drought-tolerant to minimize potable water usage for irrigation.

2. Energy Efficiency

- Meet or exceed Illinois Energy Conservation Code requirements for wall, floor, and roof insulation values.
- Utilize high efficiency heat-pump heating and cooling systems and controls.
- Utilize Energy Star-rated appliances.
- Incorporate Energy Star-rated low-E and argon-filled windows.
- Utilize LED lighting throughout the building and advanced lighting controls.
- Provide insulated headers and corners at exterior wall framing to increase wall insulation value and reduce the effects of thermal bridging.
- Employ advanced air sealing techniques around the entire building envelope to minimize air infiltration.

3. Water Resources

- Use US EPA WaterSense low-flow plumbing fixtures and faucet aerators throughout building, reducing water consumption below EPA guidelines.
- Use BMP stormwater practices including natural infiltration to avoid overcharging the city stormwater sewer system.

4. Sustainable Materials & Resources

- Use prefabricated floor trusses and wall panels to reduce material waste.
- Endeavor to use materials and products with a high recycled or re-constituted content.
- Provide space for collecting recyclables within the building.
- Use gypsum board with recycled content and with chlorine-free recycled paper facing.

5. Indoor Environmental Quality

- Promote wellness for occupants through access to daylight, views, and outdoor recreation.
- Use low or zero-VOC interior paints, sealants, and adhesives, along with non-solvent based and formaldehyde-free materials, in order to provide enhanced indoor air quality for persons with allergies, asthma and chemical sensitivities.
- Provide solid-surface flooring in most areas to reduce airborne pathogens.
- Ventilate building with Energy Star-rated continuous exhaust fans to improve indoor air quality.

HOME Funding

Phoenix Community Development Services is requesting \$600,000 in HOME funding from the City of Peoria. The HOME funding will be used to fund new construction hard costs. The other funding sources include the following:

<u>Lien</u>	<u>Source Description</u>	<u>Lender</u>	<u>Amount</u>
1	IHDA Trust Fund	IHDA PSH	1,662,826
2	National Housing TF Grant	IHDA	2,461,104
3	FHLB AHP		240,000
6	HOME Grant	City of Peoria	600,000
Total Construction Sources			4,963,930

Please find a proforma with the project sources and uses attached (Exhibit D).

The IHDA Trust Fund and National Housing Trust Fund have been committed (Exhibit E). FHLB AHP funding was applied for in June 2022, with awards anticipated to be announced in October 2022.

The \$600,000 in City of HOME funding will allow the project to cover the costs associated with the new construction of Madison Apartments III. Without the HOME funding, the project would not be able to move forward. The HOME funding is necessary to address the increased construction costs caused by the price volatility of the construction materials market as well as increasing inflation.

The beneficiaries of the HOME funding will be homeless youth between 18 and 24-years-old, many who are aging out of the child welfare system, DCFS, or have recently exited the system. All units will be at 30% AMI. While some youth who emancipate from state care are resilient and capable, statistics show that without help, they are more likely than their peers to be homeless, unemployed, or incarcerated. These young adults are more likely to have significant mental and/or other behavioral health issues than other young adults. Many will face challenges with relationships, family planning, and achieving stability. These youth have limited access to affordable housing and employment opportunities that offer a living wage. The HOME funding will allow for this vulnerable population to have stable housing and access much needed supportive and clinical services.

Project Need

Description of Need

As stated previously, the target population for Madison Apartments III is homeless youth between 18 and 24-years-old, many who are aging out of the child welfare system, DCFS, or have

recently exited the system. The need for supportive housing and services for the older youth population has continued to increase in the Peoria area. Children's Home Association of Illinois (CHAIL), a local child welfare agency that received a state grant to provide services to homeless youth aged 18 to 24 served 158 homeless youth in the preceding 5-year period. Of the 158 homeless youth that accessed services during this period, there are only 3 total dedicated PSH units for these youth, also provided by Phoenix CDS. The COVID-19 pandemic has further exacerbated homelessness within the older youth population, leaving them more vulnerable and with fewer opportunities.

The National Youth in Transition Database surveys youth in foster care at age 17 and every 2 years post-exit from foster care until age 23; 43% of the 5,583 youth who completed all three waves of the survey reports having had a homeless experience by age 21 (at either age 17, 19, or 21). The Voice of Youth Count, a national survey of unaccompanied youth ages 13 to 25 who have experienced some form of homelessness or housing instability found that nearly one third of the youth had experienced some form of involvement with the child welfare system in their lives.

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This project will bring the innovative partnership between the Home for All CoC, Peoria Housing Authority, Phoenix CDS and DCFS to a higher system capacity by providing dedicated PSH and allowing for the social services offered at Madison Apartments III to be directly tailored to address the unique barriers faced by older youth population specifically. Phoenix CDS is a licensed mental health agency and a leader in the field of permanent supportive housing for persons with mental illness in Illinois, and will offer comprehensive supportive case management, access to appropriate clinical services (i.e., mental health counseling), and access to supportive housing for this population through this project. Partnering with DCFS and the largest local child welfare agency, Children's Home Association of Illinois (CHAIL) will allow this project to offer an additional level of coordination for its residents. It will serve to reduce and prevent older youth homelessness in the area and ensure that they have the support needed to successfully transition out of state care and into adulthood.

Phoenix CDS currently operates the only Homeless Outreach team within the CoC region. However, the team has struggled to sustain engagement with this population. Many youths who age out of foster care, particularly LGBTQIA youth, are often unwilling to access shelter services. From a history of trauma to a lack of trust in systems, youth are hesitant to present to shelter programs and do not feel safe doing so. This presents multiple challenges including an inability to get an accurate count for this population, as well as lacking an entry point to engage this population. Dedicated, project-based housing to provide stable, permanent housing for youth who have aged out of foster care and/or state-supported group homes is a foundational component to this work that is currently missing from our toolkit to address this issue.

Local Support

Madison Apartments III has the support of many community organizations and agencies that want to see the project happen and will in turn assist through a number of partnerships and by providing services and resources to the residents of Madison Apartments III.

Phoenix CDS has recently been awarded a Homeless Youth grant from the Heart of Illinois United Way to support this project. CHAIL is supporting the project by referring appropriate homeless youth, providing rental assistance for homeless youth ages 18-24 who are transitioning out of the DFCS system.

Marc D. Smith, Acting Director of DCFS, provided a letter of support outlining DCFS's support for the proposed PSH and a willingness to coordinate with Phoenix Community Development Services on the proposed permanent supportive housing project ([Exhibit F](#)).

The local JOLT Foundation has entered into a MOU with Phoenix Community Development Services to provide any of the following services to residents of Madison Apartments III ([Exhibit G](#)):

- STI testing
- Educational materials
- Substance abuse harm-reduction counseling
- Harm reduction supplies
- Recovery Coaching
- Referrals for services

Market Analysis

Phoenix provided a [Market Analysis Form \(Exhibit H\)](#) that was completed for the Madison Apartments III IHDA PSH application in September 2021. The following information reflects the data included in that document.

According to DCFS data as of 9/30/2021, the identified PMA had 1,688 youth in DCFS' care. Other special needs populations are outside the eligibility scope of the targeted population for this project. The CoC has identified the targeted homeless youth population as a growing concern with a notable lack of PSH units for this sub-group. CHAIL provided trend data that shows an increase of the number of homeless youths presenting to their program over the past 5 years – with 50 homeless youth this past fiscal year.

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Although the site is situated between Phoenix's two other PSH sites, these developments are the only affordable housing going up in downtown Peoria while market units have steadily increased with downtown development. All of Phoenix's PSH sites are fully leased with a waitlist of more than 230. Phoenix has demonstrated both the need and its ability to rapidly lease-up; < than 30 days to 100% occupancy in its most recent PSH projects. The proposed development will be a unique addition to the local housing supply through its focus on a vulnerable, young adult population. By working with the Home for All Continuum of Care, the Peoria Housing Authority, DCFS and CHAIL for referrals, Madison Apartments III will begin to address the high demand for housing among this population.

Experience

Applicant/ Developer/Social Service Provider/Property Manager: Phoenix Community Development Services

Phoenix Community Development Services, a licensed mental health agency, has been providing supportive services to neighborhood members since its incorporation in 1985, using a variety of funding sources and donations, and has been developing and providing permanent supportive housing since 1989. Phoenix CDS is committed to providing comprehensive, supportive services to our most vulnerable citizens who face great challenges and barriers to achieving housing stability and self-sufficiency. The primary goal is to end homelessness and provide individuals, families, and veterans with a safe place to live independently. Among services provided to

residents are supportive counseling services to set and achieve goals, make healthy life choices, find employment, build skills, and become stable, self-sufficient members of society. Please see Exhibit I- Detailed Developer and Property Management Experience attached.

Phoenix will serve as the project's developer, social service provider, and property manager. They have extensive experience managing multifamily apartments, affordable senior housing, and special needs housing, working with multiple LIHTC and HUD-financed projects in the Peoria area. It currently provides management and oversight to approximately 150 units in 7 housing developments throughout Peoria and the surrounding communities, overseeing management and maintenance of the units. Please see Exhibit I – Detailed Developer and Property Management Experience attached.

Phoenix has over ten (10) continuous years of prior development and/or ownership experience in multifamily residential projects that now total seven (7) sites. Phoenix has not experienced a foreclosure or bankruptcy in the last three (3) years, nor has unresolved HUD or State negative compliance findings. Phoenix is an Illinois based 501c3, charitable, tax-exempt organization. Their vision is to end homelessness in Fulton, Peoria, Tazewell and Woodford Counties by ensuring access to permanent, safe and affordable housing.

Key personnel are extensively trained in the required fields related to property management for HUD developments. Staff have the following experience, training and certifications: Fair Housing Specialist Certification, Certified Occupancy Specialist training, Rental Housing Finance training, more than 10 years of experience with HOME compliance at New Hope Apartments and Glendale Apartments and have received tax credit specialist training. The company and its staff are experienced in maintaining the files and records necessary for compliance monitoring of affordable housing and reporting to investors, lenders and state/federal agencies.

Phoenix is experienced at meeting affordability, HOME and PHA requirements, including marketing and outreach under an Affirmative Fair Housing Marketing Plan, leasing units according to the Tenant Selection Plan, and compliance. Phoenix has been providing supportive services since its incorporation in 1985, using a variety of funding sources and donations, and has been developing and providing permanent supportive housing and associated supportive services since 1989. The organization is committed to providing comprehensive, supportive services to its most vulnerable citizens who face great challenges. The primary goal is to end homelessness and provide individuals, families, and veterans with a warm, safe place to live independently. Among services provided to residents are supportive counseling services to set and achieve goals, make healthy life choices, find employment, build skills, and become stable, self-sufficient members of society.

As a Sponsor/Owner, Phoenix has ownership in 180 units of housing. These developments include:

Development	Location	Type	# Units	Governmental Funding Sources
HHH Housing	Peoria, IL	New	3	HUD CoC Program
Monroe Manor	Peoria, IL	New	10	HUD CoC Program/TBRA-State and Federal
Oasis	Peoria, AR	New	6	HUD CoC Program
New Hope Apartments	Peoria, IL	Rehab	84	Low Income Housing Tax Credits/PBV/HUD Program/Historic Tax Credits
Veterans Haven	Peoria, IL	Rehab	15	VA Contract
Glendale Commons	Peoria, IL	New	28	LIHTC/FHLB/IHDA BIBP
Madison Apartments	Peoria, IL	Rehab	10	IHDA Trust Fund/LTOS Program
Madison II Apartments	Peoria, IL	New	24	IHDA Trust Fund/National Housing TF/PBVs

Please refer to the Property Manager Experience Certification in Exhibit I in for a comprehensive breakdown of properties managed.

Other Development Team Members

Architect: Worn, Jerabek, Wiltse Architects

Worn Jerabek Wiltse Architects, P.C. is a full-service architectural firm based in Chicago that focuses on affordable multi-family, market-rate multi-family, senior housing, and commercial work with substantial experience in sustainable design and architecture for people with disabilities. The firm has been in business for over 30 years and has extensive experience in designing projects within the IHDA construction and architectural standards. WJW was also the architect on Madison Apartments II, located on the adjacent property.

General Contractor: CORE Construction Services of IL, Inc.

CORE Construction was formed in 1937 and has been a vested community partner for various clients in housing, municipal, energy, federal and commercial construction throughout Illinois as well as nationally. CORE Construction has a history of cooperation with Phoenix CDS through its Glendale Commons and Madison Apartments I and II developments.

Financial Consultant: Lightengale Group

Lightengale Group (LGG), a consulting firm in business since 1999, has extensive experience in coordinating financing and project management services related to the development of affordable, market-rate and mixed-income housing. LGG has completed over 85 affordable housing transactions in the previous 15 years as a financial consultant, including coordination of project-based voucher applications, various financing sources, construction services, and in an advisory capacity to developers and owners. These projects include senior, family, and special needs housing, urban, suburban, and rural projects, housing authorities, and for-profit

developers. LGG projects have ranged in size from 8 units to 235 units. The vast majority of these projects have now been operating for many years. LGG has provided consulting services for all of Phoenix's IHDA-funded PSH projects.

Readiness to Proceed

Should the City of Peoria HOME funding be awarded, Phoenix is targeting an early December project closing and construction start. The project has site control and will acquire the land at project closing. The project architects anticipate submitting the plans and specifications to IHDA mid-September. The GC is in the process of finalizing the construction bidding. IHDA has awarded the project \$1,662,826 in IHDA Trust Fund and \$2,461,104 in National Housing Trust Fund (Exhibit E). In June 2022, the project applied for \$240,000 in AHP funds through the Federal Home Loan Bank of Chicago. Award announcements are anticipated in October 2022.

Anticipated Project Schedule:

- Closing/Construction Start: 11/15/2022
- Anticipated City of Peoria HOME Draw-Down Date: 11/15/2022
- Construction Completion: 11/15/2023
- Initial Occupancy: 11/15/2023
- Stabilized Occupancy: 2/15/2024

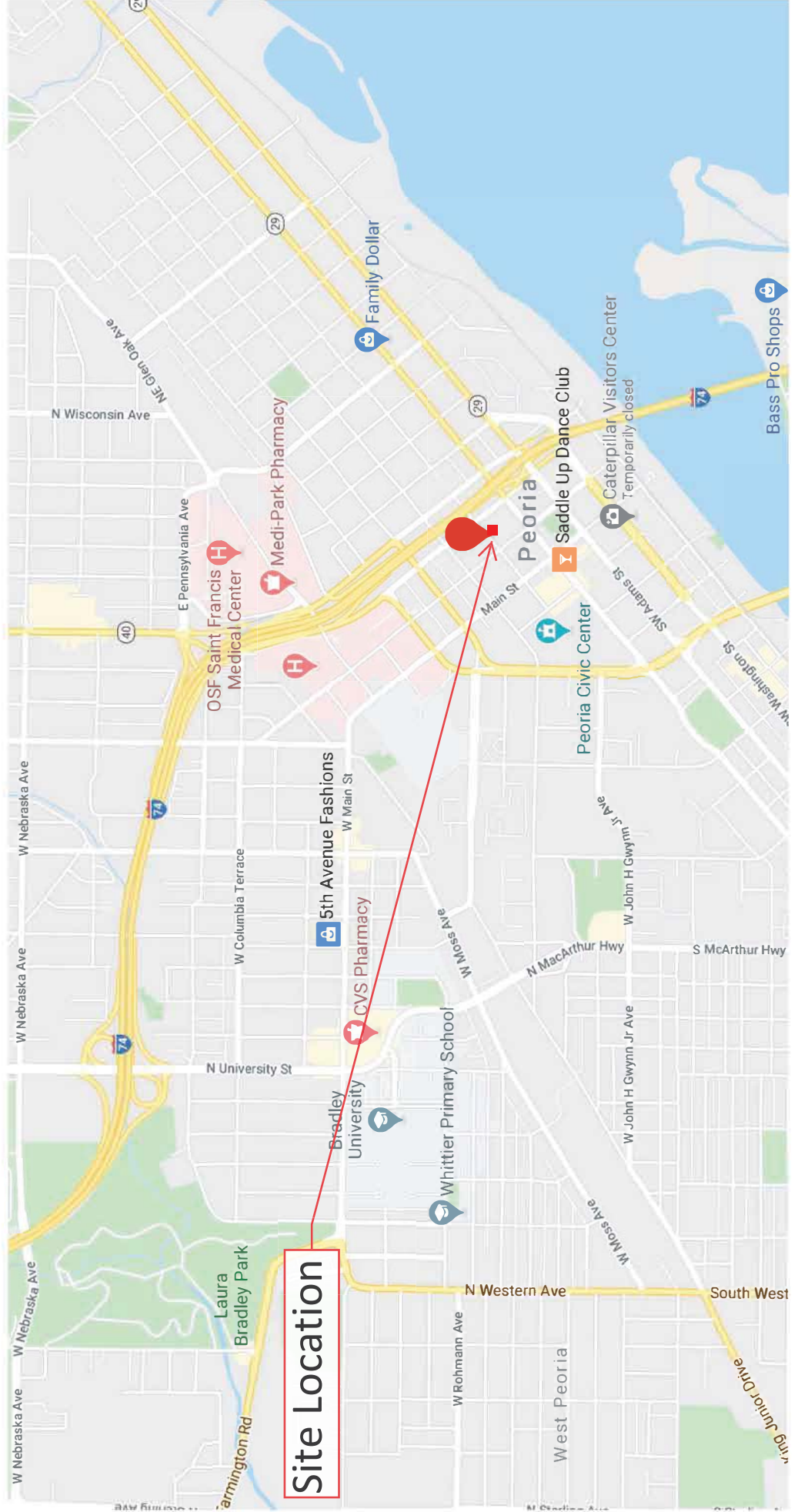
Leverage and Match

Our HOME funds request of \$600,000 will leverage more than \$4M of other financing. IHDA has awarded the project \$1,662,826 in IHDA Trust Fund and \$2,461,104 in National Housing Trust Fund. In June 2020, the project applied for \$240,000 in AHP funds through the Federal Home Loan Bank of Chicago. Award announcements are anticipated in October 2022. The IHDA Trust Fund, and FHLB AHP (if awarded) could be used as the 25% cash match required for the City of Peoria HOME funding award.

Budget

Please find a development budget attached outlining key budget items – Exhibit J – Development Budget. The project will be seeking a National Green Building Standard.

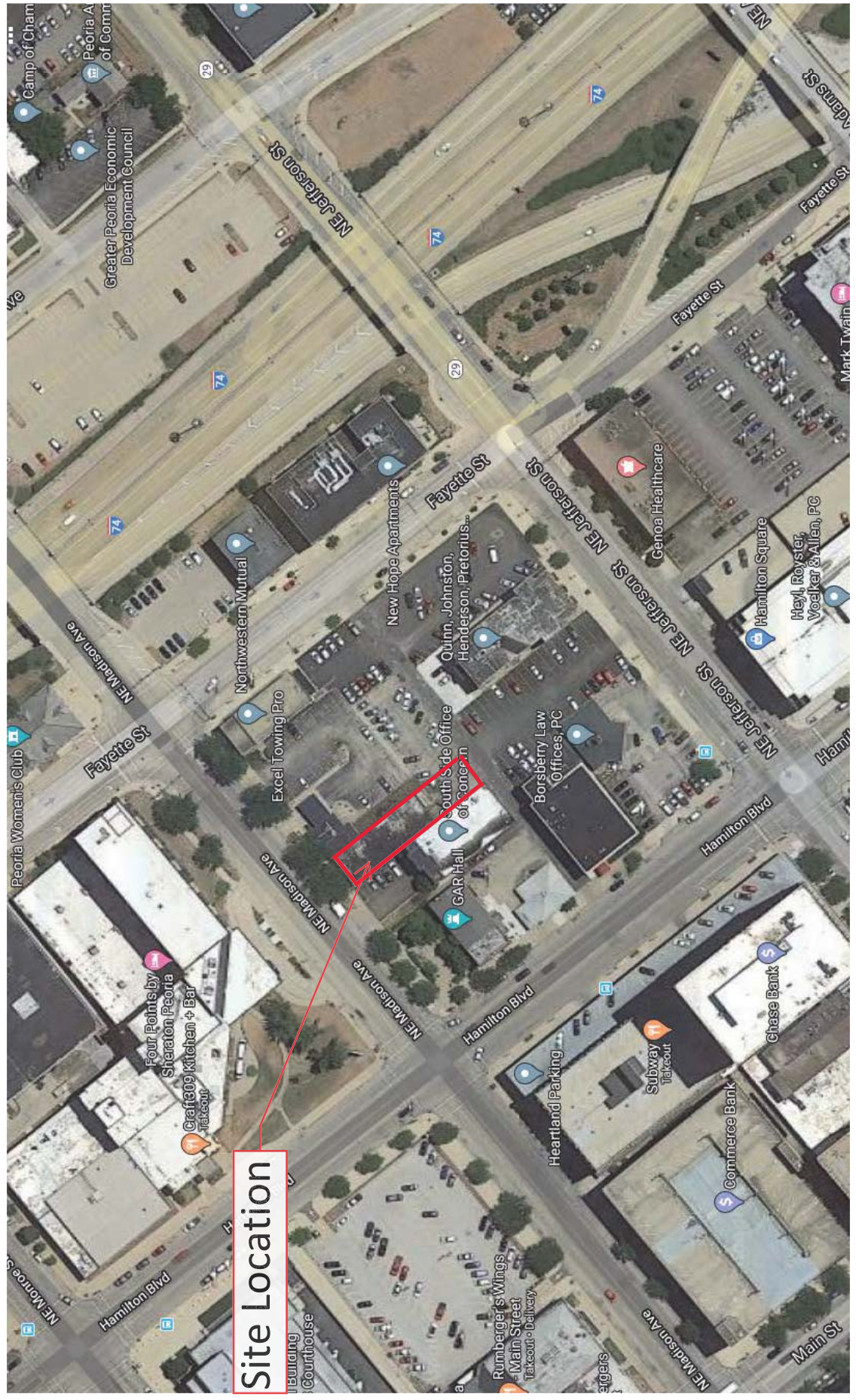
**11909_Madison III Apartments
206 NE Madison Ave, Peoria, IL 61602
F1_Site Location Maps**





11909_Madison Ill Apartments
F.1 Location Map
206 NE Madison Ave, Peoria, IL 61602

11909_Madison III Apartments
206 NE Madison Ave, Peoria, IL 61602
F1_Site Location Maps





1 VIEW FROM MADISON AVENUE LOOKING EAST
NOT TO SCALE

DRAFT - NOT FOR CONSTRUCTION
Phoenix Community Development Services
202 NE Madison Ave.
Peoria, IL 61602

MADISON APARTMENTS III OF PEORIA

206 NE Madison Ave.
Peoria, IL 61602
8/3/21

A1.2

©2021 WJW ARCHITECTS
WJW ARCHITECTS
401 W. Superior St., Suite 400
Chicago, IL 60654



Rear Urban
Oasis Rendering

Rear Aerial Rendering





FOSTER YOUTH TO INDEPENDENCE

Tenant Protection Vouchers (FYI-TPV)

NOTICE EXPLANATION

Foster Youth to Independence ([Notice PIH 2019-20](#)) allows for Public Housing Authorities (PHAs) without a current Family Unification Program (FUP) voucher allocation to request Tenant Protection Vouchers (TPV) to serve youth under the age of 25 with a history of child welfare involvement (see specific youth eligibility criteria below), for up to 36 months, with Foster Youth to Independence Tenant Protection Vouchers (FYI-TPV). For more information see the [FYI homepage](#) and [FYI TPV FAQs](#) or send questions to: FYITPV@hud.gov.

The initiative aims to help communities across the country:

1. Address gaps in the availability of FUP for youth across the country.
2. Increase housing options for youth with a current or prior history of child welfare involvement that are homeless or at risk of homelessness.
3. Contribute to the federal goal of preventing and ending youth homelessness outlined in [Home Together: The Federal Strategic Plan to Prevent and End Homelessness](#).

Public Housing Authority (PHA) Eligibility & Requirements

In order for a PHA to be eligible to request FYI-TPV it must meet all of the following:

- Currently administering the HCV program.
- Does NOT [currently administer FUP vouchers](#) awarded under any fiscal year.
- Partnership with a public child welfare agency (PCWA).
- Accept FUP-eligible youth referral.
- Determine HCV eligibility.
- Update administrative plan.

Youth Eligibility

A young person eligible to receive a FYI TPV under the notice must meet **ALL** of the following requirements:

1. Has attained at least 18 years and not more than 24 years of age;
2. Left foster care, or will leave foster care within 90 days, in accordance with a transition plan described in section 475(5)(H) of the Social Security Act at age 16 or older; and
3. Is homeless or is at risk of becoming homeless.

A young person who meets the above requirements and is pregnant and parenting is also eligible as long as the children they are parenting do not have an open child welfare case.

REQUIRED PARTNERSHIP AGREEMENT TO ADMINISTER FYI

PHAs requesting FYI-TPV assistance from HUD must enter into a partnership agreement with a public child welfare agency (PCWA). HUD also strongly encourages involvement of the Continuum of Care (CoC), or designated CoC recipient in the partnership agreement. At minimum this agreement must:

1. Be in the form of Memorandum of Understanding (MOU) or letters of intent between the parties;
2. Outline the definition of FYI eligible youth. HUD strongly encourages a prioritization policy for this limited resource;
3. Outline the supportive services provided based on requirements, including which entity will provide the supportive services; and
4. Describe the PHA, PCWA and (if applicable) CoC responsibilities.

SUPPORTIVE SERVICE REQUIREMENTS

Requirements for administering supportive services

- PCWA is required to provide or secure supportive services for participating youth
- Services must be provided for a period of 36 months
- Notice describes the required services; additional services may be provided
- Participation in services on behalf of the youth is optional

Required types of supportive services

- Basic life skills training
- Housing counseling
- Landlord support services
- Employment and training
- Education and career advancement services

ROLE OF PARTNERS

Public Child Welfare Agency (PCWA) (required partner & responsibilities)	Public Housing Authority (PHA) (required partner & responsibilities)	Continuum of Care (CoC) (strongly encouraged partner & responsibilities)
Identify eligible youth, verify eligible child welfare history. <i>PHA and CoC may also identify potential youth, but the PCWA must verify eligible child welfare history and refer to the PHA once verified.</i>	Accept referrals from PCWA.	Assist in identifying youth with a child welfare history and housing need, and connecting the youth to the PCWA for verification and referral to FYI-TPV.
Develop a system of prioritization for referral to the PHA based on the youth's level of need and the appropriateness of the intervention.	Verify eligibility for HCV.	Work with the PCWA and PHA to match eligible youth to services.
Provide a written certification to the PHA verifying eligible child welfare history.	Request FYI-TPV from HUD.	
Provide or secure 36 months of supportive services.	Update administrative plan. Administer FYI-TPV for eligible youth for up to 36 months. *	

*FYI-TPVs are time-limited to 36 months and sunset when a youth transitions off the voucher. This means the PHA cannot reissue the FYI-TPV assistance. A single PHA may request a maximum of 25 FYI-TPVs in a fiscal year.

PROCESS FOR REQUESTING FYI-TPV FROM HUD

1. Before requesting FYI-TPV from HUD, a local public housing authority and a local public child welfare agency must enter into a partnership agreement as described on the bottom of the previous page.*
2. Once the agreement is in place, the public child welfare agency must send a referral to the PHA that includes the young person's name and a written certification of their eligible child welfare history.
3. The public housing authority must verify the youth's eligibility for an HCV.
4. The PHA must send a request to HUD via email to FYITPV@hud.gov. The request must list individual name(s) of eligible youth; more than one name can be listed in a single request. For a full explanation of the email request see section 15 of Notice PHA 2019-20.
5. Upon receipt of the email request from the PHA, HUD will conduct an eligibility determination.
6. Eligible applications will result in issuance of amended Annual Contributions Contract (ACC) to the PHA to administer the TPV(s).

*Note the timeline for young people in your community to begin receiving assistance through FYI is largely dependent on (1) the time it takes to secure the required supportive services and (2) the time it takes to enter into a partnership agreement between the PHA and PCWA.



**PEORIA HOUSING AUTHORITY (HA CODE IL003)
MEMORANDUM OF UNDERSTANDING
FOSTERING YOUTH TO INDEPENDENCE INITIATIVE**

This Memorandum of Understanding (MOU) has been created and entered into on August 1, 2020 by and between the following parties in relation to their request for assistance under the Foster Youth to Independence (FYI) initiative and the requirements of PIH Notice 2019-20 (HA):

the Peoria Housing Authority (PHA),
the Illinois Department of Children and Family Services (“IDCFS”), and,
the Heart of Illinois Homeless County Continuum of Care (“CoC”)

in relation to their application for U.S. Department of Housing and Urban Development (“HUD”) Fostering Youth to Independence funding. PHA, IDCFS and the CoC are collectively referred to herein as “Parties” or individually as a “Party.”

I. Statement of Cooperation

1. Commitment to administering the program.
 - a. PHA, IDCFS and the CoC are committed to administering FYI.
 - b. PHA is committed to providing subsidized housing to eligible persons.
 - c. IDCFS is committed to assisting youth aging out of care in obtaining adequate housing.
 - d. The CoC is committed to integrating the prioritization and referral process for FYI eligible youth into its local coordinated entry process.

2. Goals and standards of success in administering the program.

The Parties agree to the following goals and standards of success in administering the program:

- a. To help 67% of youth referred to the program obtain adequate permanent housing;
 - b. To empower youth to resolve their own problems and effectively utilize service systems; and
 - c. To initiate and sustain methods to identify the problems of FYI eligible youth as early as possible and engage these FYI eligible youth in a change process to remedy these problems.
3. Identification of staff positions who will serve as the lead FYI Liaisons:

For PHA: Aldisa Jordan, Director of Housing Choice Voucher Program
ajordan@pha.peoria.il.us

For IDCFS: John Cheney Egan, Public Service Administrator,
john.j.egan@illinois.gov

For CoC: Kate Green, Executive Director, kate.green@local.unitedway.org

These positions will be responsible for the transmission and acceptance of FYI referrals and ensuring that the housing subsidy and services discussed in this MOU are provided.

II. Youth Eligibility

The population eligible to be assisted under this Agreement are youth certified by DCFS as meeting the following conditions:

1. Youth is between 18 years of age and 24 years of age;
2. Youth has left foster care, or will leave foster care within 90 days, in accordance with a transition plan described in section 475(5)(H) of the Social Security Act at age 16 or older; and
3. Youth is homeless or is at risk of becoming homeless as these terms are defined at 24 CFR 578.3 and 24 CFR 576.2.

Eligibility is not limited to single persons. For example, pregnant and/or parenting youth are eligible to receive assistance under this notice assuming they otherwise meet eligibility requirements.

III. Supportive Services

IDCFS, PHA and the CoC will work together to offer every youth who is referred for an FYI voucher all of the supportive services listed in Section III.2 for a period of 36 months. Youth will not be required to participate in these services as a condition of receipt of the voucher.

1. Programs providing required services.
 - a. IDCFS, PHA and the CoC are committed to providing the following services to youth receiving rental assistance through a FYI voucher for at least 36 months. Services may extend beyond the age of eligibility as long as the youth is FYI eligible at the time, he/she received the voucher and services begin. Services will be offered to youth starting six months before the youth ages out of DCFS care and will be funded through the following programs:
 - b. The Administration of Child Youth and Families approved IDCFS' request to use funds received through the Chafee Independence Facilitation Grant to serve youth until they turn 23. DCFS funds the Center for Youth and Family Solutions (CYFS) to offer all services listed in Section III.2 to all youth referred to FYI until they turn 23;
 - c. Federal and State prevention funding will be used to fund CYFS to offer all services listed in Section III.2 to parenting youth referred to FYI to ensure that the

youth remains stable in their housing, attains their goals as they transition to adulthood, and to help prevent a new generation of children from coming into care;

- d. In the summer of 2019, DCFS created Alumni Centers which are located at DCFS contracted Family Advocacy Centers funded by the State of Illinois. The Alumni Centers serve both parenting and non-parenting youth who had previously been in DCFS care. The Alumni Centers support any youth requesting services who was previously in the child welfare system until the youth turns 30 years of age. Crittenton Centers receives funding from IDCFS to administer an Alumni Center serving Peoria County; and
- e. The Phoenix Community Development Services has been identified as the agency who will provide services listed below for non-parenting youth 23 and over who are in receipt of an FYI voucher.

2. Services Provided:

IDCFS, PHA and the CoC are committed to providing both the services required by FYI and other services the youth are eligible to receive. These services include:

- a. Basic life skills information/counseling on money management, use of credit, housekeeping, proper nutrition/meal preparation, and access to health care (e.g., doctors, medication, and mental and behavioral health services);
- b. Counseling on compliance with rental lease requirements and with housing choice voucher (HCV) program participant requirements, including assistance/referrals for assistance on security deposits, utility hook-up fees, and utility deposits;
- c. Providing such assurances to owners of rental property as are reasonable and necessary to assist a FYI eligible youth to rent a unit with a FYI voucher;
- d. Job preparation and attainment counseling (where to look/how to apply, dress, grooming, relationships with supervisory personnel, etc.); and
- e. Educational and career advancement counseling regarding attainment of general equivalency diploma (GED); attendance/financing of education at a technical school, trade school or college; including successful work ethic and attitude models;

IV. PHA Responsibilities

PHA will fulfill each of the following responsibilities:

1. Accept youth who have been certified by IDCFS as eligible for the FYI;
2. Determine if youth age 18 through 24 who have been referred by IDCFS are eligible for HCV assistance and place eligible youths on the HCV waiting list;

3. Submit list of youth referred by IDCFS to HUD for FYI funding;
4. Administer the vouchers in accordance with applicable program regulations and requirements;
5. Amend the administrative plan in accordance with applicable program regulations and requirements, if needed; and
6. Comply with the provisions of this MOU.

V. IDCFS Responsibilities

IDCFS will fulfill each of the following responsibilities:

1. IDCFS will identify FYI eligible youths within IDCFS' caseload;
 - a. IDCFS has already searched their entire caseload for youth who are within one year of aging out of care. DCFS will contact the child welfare worker of youth who are within one (1) year of aging out to determine if the youth is at risk of becoming homeless when they age out of care. When a youth in care turns 20.5, IDCFS will send a postcard about the Youth Housing Advocacy program to the youth. IDCFS will also email the worker and explain housing services the program provides. Approximately three months before a youth turns 21, IDCFS will hold a staffing with the youth, the child welfare worker and supervisor, and other persons the youth invites. Often this includes the local youth housing advocate.
 - b. IDCFS will work with the CoC, to identify FYI eligible youth who are not currently within IDCFS' caseload by integrating the prioritization and referral process for FYI eligible youth into the local CoC's coordinated entry process. IDCFS will offer to provide services to these youth before they turn 20.5.
 - i. The IDCFS Youth Housing Assistance Program Coordinator will mail postcards to youth will be aging out of care before they reach 20.5 years of age and will automatically refer these youth to a housing advocate who will inform the youth of FYI availability.
 - ii. IDCFS will administer a youth hotline for youth who age out prior to turning 21 and need assistance with housing or re-entry into DCFS care, if eligible. The youth hotline staff will refer the youth to the Youth Housing Assistance Program Coordinator. IDCFS will inform the youth hotline of the availability of FYI so the hotline can inform the youth to contact the IDCFS YHAP coordinator to request assistance.

- iii. The Alumni Centers at the DCFS contracted Family Advocacy Centers will inform youth who have aged out of care, but not yet turned 25, of the availability of FYI vouchers and how to apply.
 - iv. IDCFS and the CoC will work together to identify FYI-eligible youth not currently within IDCFS' caseload. IDCFS will integrate the CoCs in the process of identifying and prioritizing FYI eligible youth into the protocol IDCFS uses to refer FYI eligible youth to FYI. PHA and IDCFS will notify the CoC when FYI vouchers are available. The CoC will provide the names and the dates of birth of the youth to the IDCFS FYI Liaison who will determine if the youth have already aged out of care. The CoC will complete a DCFS FYI referral form that will state the youth's eligibility criteria and information regarding the required services for youth receiving an FYI voucher.
2. The referral system described in Section V.1. will prioritize youth based on the likelihood that:
 - a. The service provided will keep the youth stable.
 - b. The service provided will keep a new generation of children from coming into the child welfare system
 - c. The service is needed because the youth is homeless or to prevent the youth from becoming homeless
3. The child welfare worker or homeless service provider making the referral will complete and sign a form describing the youth's situation, including their current housing situation. The IDCFS FYI Liaison will provide written certification to PHA that the youth qualifies as an FYI-eligible family, based upon the criteria established in Section 8(x) of the United States Housing Act of 1937 and FYI NOFA;
4. IDCFS will provide the services listed in Section III.2 in this MOU either directly, through a contract with a service provider, or through the commitment from the CoC as identified in Section III.1;
5. IDCFS will provide cash assistance to youth participating in FYI who are under 23 years of age to help them obtain and move into housing; and
6. IDCFS will comply with the provisions of this MOU.

VI. CoC Responsibilities

The CoC will fulfill each of the following responsibilities:

1. The CoC will integrate the prioritization and referral process for FYI-eligible youth into the CoC's coordinated entry process;

2. The CoC will provide services to non-parenting youth age 23 and over listed in Section III.2 of this MOU;
3. The CoC will provide cash assistance to assist youth age 23 and over to pay an initial security deposit;
4. The CoC will refer FYI-eligible youth to IDCFS; and
5. The CoC will comply with the provisions of the MOU.

VII. Amendment and Termination

1. **Effective date.** This MOU becomes effective upon the date of signature of the Parties. Each Party guarantees providing services described in this MOU for the clients referred by IDCFS to receive a housing choice voucher funded through the 2019 FYI NOFA application.
2. **Amendment.** This MOU may be amended by a written agreement signed by all Parties, or authorized agents of the Parties.
3. **Governing Law.** This MOU shall be governed by the laws of the State of Illinois and insofar as applicable, by related federal laws and regulations.
4. **Parole Evidence.** This MOU and the attachments herein contain all the terms and conditions agreed to by the Parties. No other agreement regarding the subject matter of this MOU is valid unless agreed to in writing and signed by all Parties.
5. This MOU shall not be binding and enforceable unless signed by all Parties.
6. Notwithstanding anything to the contrary in this MOU, this MOU may be terminated, without cause, upon thirty (30) days' written notice by any Party given to all other Parties. The termination of the MOU shall not affect the liability of a party for breach of any of the provisions of the MOU prior to termination. Once terminated, the Parties shall have no further obligations except as stated in Section VIII and Section IX, the Indemnification and Confidentiality provisions of this MOU, which shall survive any such termination.

VIII. Indemnification

PHA and the CoC agree to indemnify each other as follows:

1. **Indemnification by IDCFS.** To the extent permitted by law, IDCFS shall indemnify and hold harmless PHA and CoC and their respective members, shareholders, officers, directors, employees, agents, and affiliates from and against all claims, costs, damages, liability, fines, penalties, losses and/or expense (including reasonable attorneys' fees and expenses, consultants' fees, and court costs) arising from or incident to: (a) the negligent

acts or omissions of IDCFS, its staff, its employees, its contractors or agents, and/or its officers in the performance of IDCFS's duties and obligations under this MOU or related to IDCFS's duties and obligations under this MOU; and (b) the breach of this MOU by IDCFS, its staff, its employees, its contractors or agents, and/or its officers. PHA and CoC shall not be entitled to indemnification from IDCFS for claims, liability, losses, or damages to the extent caused by PHA's or CoC's own acts or omissions of its officers, employees, or agents.

- 2. Indemnification by PHA.** PHA shall indemnify and hold harmless IDCFS and CoC and their respective members, shareholders, officers, directors, employees, agents, and affiliates from and against all claims, costs, damages, liability, fines, penalties, losses and/or expense (including reasonable attorneys' fees and expenses, consultants' fees, and court costs) arising from or incident to: (a) the negligent acts or omissions of PHA, its staff, its employees, its contractors or agents, and/or its officers in the performance of PHA's duties and obligations under this MOU or related to PHA's duties and obligations under this MOU; and (b) the breach of this MOU by PHA, its staff, its employees, its contractors or agents, and/or its officers. IDCFS and CoC shall not be entitled to indemnification from PHA for claims, liability, losses, or damages to the extent caused by IDCFS's or CoC's own acts or omissions of its officers, employees, or agents.
- 3. Indemnification by CoC.** CoC shall indemnify and hold harmless PHA and IDCFS and their respective members, shareholders, officers, directors, employees, agents, and affiliates from and against all claims, costs, damages, liability, fines, penalties, losses and/or expense (including reasonable attorneys' fees and expenses, consultants' fees, and court costs) arising from or incident to: (a) the negligent acts or omissions of CoC, its staff, its employees, its contractors or agents, and/or its officers in the performance of CoC's duties and obligations under this MOU or related to CoC's duties and obligations under this MOU; and (b) the breach of this MOU by CoC, its staff, its employees, its contractors or agents, and/or its officers. PHA and IDCFS shall not be entitled to indemnification from CoC for claims, liability, losses, or damages to the extent caused by PHA's or IDCFS's own acts or omissions of its officers, employees, or agents.
- 4. Notification.** Any party seeking indemnification hereunder shall immediately notify the indemnifying party of the claim, summons, legal action, liability, losses or damages for which indemnification is sought. Thereafter, the indemnifying party will be entitled to assume and direct the defense of any litigation regarding the same; provided that the indemnified party shall be permitted to participate, at its own cost, in the defense. In addition, the indemnified party shall, upon the indemnifying party's reasonable request, cooperate in the preparation of the defense.
- 5. Survival.** These indemnification obligations are for events that occur during the term of the MOU and these indemnification obligations will survive the termination of this MOU.

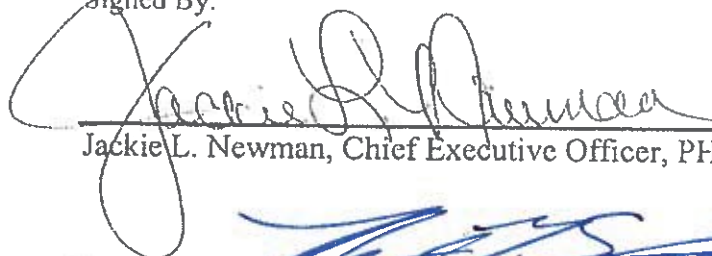
IX. Confidentiality

1. The Parties shall maintain the confidentiality of proprietary and confidential information (“Confidential Information”) in accordance with this section.
2. “Confidential Information,” as used herein, means any information relating to the operations of the Parties, or any of their affiliates, whether or not reduced in written or other tangible form, which (i) is not generally known to the public or in the industry; (ii) has been treated by a Party as confidential or proprietary; or (iii) all information, including without limitation documents, data, and/or information of any nature whatsoever, disclosed in tangible and/or intangible form furnished or disclosed by one Party (“Disclosing Party”) to another Party (Receiving Party”) pursuant to or in performance of this MOU.
3. The Parties, their directors, officers, employees, accounts, attorneys, consultants or contractors, or other agents shall hold in strict confidence all Confidential Information obtained with respect to the other Parties and shall not use such information or disclose the same to others except as set forth in this section. Confidential Information may be used by the Receiving Party solely to the extent necessary to perform its obligations under this MOU and the Receiving Party shall not disclose Confidential Information to any third party except as set forth herein in paragraph 4 of this section.
4. This section does not preclude any Party from:
 - (a) Disclosing Confidential Information to a Party’s own directors, officers, employees, accounts, attorneys, consultants or contractors, or other agents in connection with or in the Performance of this MOU, provide that the Party shall advise such persons that the Confidential Information is subject to this MOU and shall take all reasonable steps to prevent such persons from further disclosing any such Confidential Information and shall be responsible for any unauthorized disclosures by said persons;
 - (b) Disclosing or utilizing Confidential Information which prior to such disclosure was already public information;
 - (c) Disclosing or utilizing Confidential Information which shall come into the public domain by means other than a wrongful act of the party;
 - (d) Disclosing or utilizing Confidential Information that was independently acquired from another source (provided that such source is not or was not bound by this MOU or a confidentiality agreement with the Disclosing Party); and
 - (e) Disclosing or utilizing Confidential Information as it is required to disclose pursuant to law. If any disclosure of Confidential Information received by a Party is requested or required in a judicial proceeding, regulatory proceeding, or pursuant to a state (5 ILCS 140/1, *et seq.*) or federal (5 USCS § 552, *et seq.*) Freedom of Information Act request, the Party receiving the request or order, or whose affiliate received same, shall provide the other Parties prompt

notice thereof. If the disclosure is compelled as a matter of law, the disclosure shall be limited to that portion of the Confidential Information that is required to be disclosed.

- 5. The Confidential Information shall be and remain the property of the Disclosing Party. Upon termination of this MOU, the Receiving Parties shall make good faith efforts to return or destroy Confidential Information as directed by the Disclosing Party.
- 6. The provisions in Section IX shall survive the expiration or termination of this MOU.

Signed By:



Jackie L. Newman, Chief Executive Officer, PHA

8/17/2020
Date



Marc D. Smith, Acting Director, IDCFS (PCWA)

9/15/2020
Date



Kate Green, Executive Director, CoC Collaborative Applicant Authorized Representative

8/18/2020
Date

Project Overview
20220811 Madison III City of Peoria HOME

Project Overview

Developer South Side Office of Concern
 Location 206 NE Madison Ave Peoria IL 61602
 # of Buildings 1

Square Footage

Site Area Sq.Ft. 6,172
 Building Gross 14,770
 Building Net 14,770
 Commercial Space -
 Other Non-Residential Space -

Schedules

Construction Loan Closing 9/1/2022
 Construction Completion 08/2023
 Lease-Up Begins 07/2023
 100% Occupancy Date 10/2023

Affordability Overview

Description	0 BR	1 BR	Total
30% AMI	4	3	7
LTOS			
30% AMI	5	4	9
CHIL			

Development Costs

Category	Amount	Per Unit	Per Gross SF
Acquisition	300,000	18,750	20.31
Construction	3,540,743	221,296	239.73
Construction Period	51,499	3,219	3.49
Professional Fees	420,970	26,311	28.50
Marketing & Leasing	7,500	469	0.51
Lender Fees	25,750	1,609	1.74
Developer Fee	520,196	32,512	35.22
Tenant Relocation	10,000	625	0.68
Reserves	87,272	5,455	5.91
Total Uses	4,963,930	310,246	336.08

Eligible Basis	Acquisition	Construction	Historic
Building Basis	NA	NA	NA
Personal Property	NA	NA	NA
Site Work	NA	NA	NA
Total Eligible Basis	NA	NA	NA

Income & Expenses

Category	Number of Bedrooms	Avg. GSF	Avg. Rent	# of Units	Monthly Income	Annual Income
0 BR		529	628	9	5,655	67,860
1 BR		600	739	7	5,175	62,100
Gross Residential Income		560	677	16	10,830	129,960
Less Residential Vacancy			10.00%		1,083	12,996
Less Rental Allowance			0.00%		-	-
Effective Residential Income			90.00%		9,747	116,964
Effective Commercial Income					0	0
Effective Other Income					128	1,530
Gross Effective Income					9,875	118,494

Category	Annual Per Unit	Monthly	Annual
Less Operating Expenses	6,072	8,095	97,145
Less Replacement Reserves	450	600	7,200
Net Operating Income	884	1,179	14,149
Total Debt Year 1	75	100	1,200
Cash Flow Year 1	809	1,079	12,949
DCR			11.79

Permanent Sources of Funds

Lien	Loan Description	Lender	Amount	Perm Term / Amtz	Initial Perm Rate	Fixed/ Varied	Payment Year 1
1	IHDA Trust Fund	IHDA PSH	1,662,826	30 / Balloon	0.000%	Fixed	1,200
2	National Housing TF Grant	IHDA	2,461,104	20 / Balloon	0.000%	Fixed	
4	FHLB AHP		240,000				
6	HOME Grant	City of Peoria	600,000				
Total			4,963,930				1,200

Detailed Project Rental Income

20220811 Madison III City of Peoria HOME

Residential Unit Types - General Information							
Unit Type	Avg. Rent	Unit Count	# BRs	# BAs	Gross SF	Vac Rate	Esc Rate Comments
0 BR	628	9	-	1.0	529	10.00%	2.00%
1 BR	739	7	1	1.0	600	10.00%	2.00%
Totals	677	16			8,961	10.00%	2.00%

Residential Income by AMI Description									
Unit Type	Monthly Rent	Total Units	Monthly Rent PSF	Annual Rent PSF	Monthly Rent	Annual Rent	Vacancy	Effective Gross Income	Effective Gross Income
0 BR	631	5	1.19	14.31	3,155	37,860	(3,786)	34,074	34,074
1 BR	675	4	1.13	13.50	2,700	32,400	(3,240)	29,160	29,160
30% AMI CHIL	651	9	1.16	13.95	5,855	70,260	(7,026)	63,234	63,234
0 BR	625	4	1.18	14.18	2,500	30,000	(3,000)	27,000	27,000
1 BR	825	3	1.38	16.50	2,475	29,700	(2,970)	26,730	26,730
30% AMI LTOS	711	7	1.26	15.17	4,975	59,700	(5,970)	53,730	53,730

Residential Income Summary				
	Monthly	Annual	PSF Income	
Gross Residential Income	10,830	129,960	14.50	
Vacancy & Collection Loss	(1,083)	(12,996)	(1.45)	
Rental Allowance / RM Unit	0	0	0.00	
Effective Residential Income	9,747	116,964	13.05	

Other Income				
Description	Income Per	Annual Income	Gross Vacancy / Coll Loss	Effective Gross Income
Laundry	1,700 Year	1,700	10.00%	1,530
Other Income Total		1,700	10.00%	1,530

Grand Total Income					
Type	Gross Annual Income	Vacancy / Coll Loss Amt	Rental Allowance	Effective Gross Income	Y1 Avg. Esc Rate
Residential	129,960	(12,996)	0	116,964	2.00%
Commercial	0	0	0	0	0.00%
Other	1,700	(170)	0	1,530	2.00%
Grand Total	131,660	(13,166)	0	118,494	2.00%

Operating Costs

20220811 Madison III City of Peoria HOME

Budget Line Item	Amount	Per Unit	% of EGI	Escalation Rate
Legal	400	25	0.3%	3.0%
Office Supplies	1,500	94	1.3%	3.0%
Telephone Service	1,750	109	1.5%	3.0%
LIHTC Monitoring Fee	800	50	0.7%	3.0%
Administration Total:	4,450	278	3.8%	3.0%
Management Fee	8,295	518	7.0%	2.0%
Management Fee Total:	8,295	518	7.0%	2.0%
Administrative	15,000	938	12.7%	3.0%
Maintenance	15,000	938	12.7%	3.0%
Payroll Total:	30,000	1,875	25.3%	3.0%
Property Insurance	10,000	625	8.4%	3.0%
Taxes & Insurance Total:	10,000	625	8.4%	3.0%
Elevator Contract	4,700	294	4.0%	3.0%
Pest Control	5,000	313	4.2%	3.0%
Scavenger Service	4,000	250	3.4%	3.0%
Decorating	500	31	0.4%	3.0%
Maintenance Supplies	2,000	125	1.7%	3.0%
General Repairs	2,500	156	2.1%	3.0%
Maintenance Total:	18,700	1,169	15.8%	3.0%
Gas	6,500	406	5.5%	3.0%
Water/ Sewer	5,700	356	4.8%	3.0%
Electricity	13,500	844	11.4%	3.0%
Utilities Total:	25,700	1,606	21.7%	3.0%
Replacement Reserve	7,200	450	6.1%	3.0%
Reserves Total	7,200	450	6.1%	3.0%
Total Operating Costs	104,345	6,522	88.1%	2.9%

Development Costs
20220811 Madison III City of Peoria HOME

Budget Line Item	Budget	Per Unit
Building Cost	295,000	18,438
Title and Transfer Taxes	5,000	312
Acquisition Total:	300,000	18,750
Demolition	31,481	1,968
Site Work	110,478	6,905
Net Construction Costs	2,793,529	174,596
General Conditions	165,672	10,354
Overhead	55,224	3,452
Profit	165,672	10,354
Bond Premium / LOC fee	20,913	1,307
Utility Fees	20,000	1,250
Building Permits	31,000	1,938
Contingency	146,774	9,173
Construction Total:	3,540,743	221,297
Builders Risk Insurance	11,499	719
Real Estate Taxes	10,000	625
Security	30,000	1,875
Construction Period Total:	51,499	3,219
Architect -- Design	143,255	8,953
Architect -- Supervision	61,395	3,837
Engineering Fees	29,900	1,869
Furniture Fixtures & Equipment	33,300	2,081
Predevelopment Interest	25,000	1,562
Legal - Organizational	50,000	3,125
Plats & Surveys	10,000	625
Appraisal	2,000	125
Environmental Reports	10,000	625
Soils and Material Testing	20,000	1,250
Market Study	5,500	344
Title & Recording Fees	13,500	844
Green Certification Fees	17,120	1,070
Professional Fees Total:	420,970	26,310
Lease-Up Expense	7,500	469
Marketing & Leasing Total:	7,500	469
Application Fee	750	47
Lender Legal Costs	25,000	1,562
Lender Fees Total:	25,750	1,609
Developer Fee	370,196	23,137
Consultant Fee	150,000	9,375
Developer Fee Total:	520,196	32,512
Relocation	10,000	625
Tenant Relocation Total:	10,000	625
Tax & Insurance Escrow	10,500	656
Replacement Reserve	24,000	1,500
Operating Deficit	52,772	3,298
Reserves Total:	87,272	5,454
Total Development Cost	4,963,930	310,245

Sources of Funds
20220811 Madison III City of Peoria HOME

Construction Sources of Funds

Lien	Source Description	Lender	Amount	Term	Interest Type	Avg. Interest Rate	Total Paid Interest
1	IHDA Trust Fund	IHDA PSH	1,662,826	18 Months	Fixed	0.000%	
2	National Housing TF Grant	IHDA	2,461,104	18 Months	Fixed	0.000%	
3	FHLB AHP		240,000				
6	HOME Grant	City of Peoria	600,000				
Total Construction Sources			4,963,930				

Permanent Sources of Funds

Lien	Source Description	Lender	Amount	Term	Amortization Period	Initial Interest Rate	Initial Annual Payment	DCR
1	IHDA Trust Fund	IHDA PSH	1,662,826	30 Years	Balloon	0.000%	1,200	11.79
2	National Housing TF Grant	IHDA	2,461,104	20 Years	Balloon	0.000%	-	
4	FHLB AHP		240,000					
6	HOME Grant	City of Peoria	600,000					
Total Permanent Sources			4,963,930				1,200	11.79



Letter of Interest (“LOI”)	
General Terms	
Borrower:	A to-be-formed sole or single purpose entity acceptable to the Authority.
Lender/Grantor:	Illinois Housing Development Authority (the “Authority”).
Purpose:	To provide construction and permanent financing to the Borrower in connection with Madison Apartments III.
National Housing Trust Fund (NHTF)	
Financing Structure:	The NHTF funds will be structured as a forgivable grant to be recorded against the property.
Grant Amount:	\$ 2,461,104
Term:	Construction – 24 months; permanent – 30 years.
Conditions:	Any funds not expended within 24 months of closing will be forfeited.
Grant Security:	Lien on land and any improvements, UCC filings, and any additional security reasonably required by the Authority’s underwriting.
Recourse:	Non-recourse with program specific carveouts.
Illinois Affordable Housing Trust Fund (IHTF) Construction to Permanent Loan Terms	
Financing Structure:	The IHTF loan will be interest-free and non-amortizing. During the permanent phase there will be annual payments set based on the greater of 25% of surplus Cash Flow or \$1,200.
Loan Amount:	\$ 1,662,826
Interest Rate:	0%
Term:	Construction – 24 months; permanent – 30 years.
Debt Service Payment:	\$0 during construction; the greater of 25% of Cash Flow or \$1,200 annually.
General Affordability Requirement:	30 years, serving a low-income population.
Loan Security:	First lien on land and any improvements, UCC filings, and any additional security reasonably required by the Authority’s underwriting.
Recourse:	Non-recourse with program specific carveouts.
Lockout:	Loan shall not be prepayable in full or in part without the Authority’s written consent.
General Fees	
Application Fees:	\$250 (non-profit)
Asset Management Fee:	\$50 per unit per year
Authority Legal Fee:	\$0



Third-Party Reports:	Engaged by Borrower and adhering to Authority standards as posted on the Authority's website. At a minimum, an Appraisal and a Phase I Environmental Assessment will be required.
Reserves	
Replacement Reserve:	\$1,500 per unit capitalized at final close. Ongoing reserves of \$450 per unit will trend at 3% annually.
Operating Reserve:	Six months of operating expenses and debt service if applicable, capitalized at final close.
Taxes and Insurance:	55% of the most recent annual real estate tax bill (or proof of real estate tax abatement) and 105% of the most recent annual insurance premium capitalized at final close.
Other	
Prerequisites:	<p>The Authority shall require the following prior to issuing a conditional commitment for the above referenced funding requests:</p> <ul style="list-style-type: none"> • The Authority's Board approval of the loan and grant; • Submission of the Authority's Common Application and any additional due diligence reasonably required to underwrite and approve the loan and grant; • A firm commitment of all other financing, including project based rental assistance; • A construction guarantor acceptable to the Authority; • Execution of a Conditional Commitment Letter (CCL) by the Borrower; and • Any additional information required by the Authority.

This LOI outlines the initial terms and conditions of the proposed financing. This LOI is confidential and cannot be shared with any parties without the Illinois Housing Development Authority's (the "Authority") prior written consent, except Borrower's attorney, accountant, officers, directors and employees. This LOI is not all-inclusive and does not include every term or condition that may be included in a term sheet and final legal documentation for the transaction. The financing discussed in this LOI remains subject to the approval of the Authority's Board and does not constitute a commitment to provide financing.

If this LOI is not signed by a duly authorized signatory and electronically returned to multifamilyfin@ihda.org by 5pm (CST) on December 30, 2021, it shall expire without any further action on the part of the Authority and shall be of no further force or effect.

By: Christine Kahl
 Name: Christine Kahl
 Title: President/CEO
 Date: 11/23/2021

11909_Madison Apartments III
206 NE Madison Ave, Peoria IL 61602
H. Evidence of Coordination with DCFS

Madison Apartments III will provide permanent supportive housing for the homeless older youth population in coordination with DCFS. The following documentation is included in this exhibit:

- **A letter from Marc D. Smith Acting Director of DCFS**, outlining DCFS's support for the proposed PSH and a willingness to coordinate with Phoenix Community Development Services on the proposed permanent supportive housing project.
- **“Commitment to Provide Supportive Services” by the project sponsor Phoenix Community Development Services** to provide the appropriate supportive services for the residents at the proposed development, Madison Apartments III. Phoenix CDS is a licensed mental health agency and has the capacity to provide the services as described in the attached supportive service plan. The commitment letter outlines how referrals and services will be provided in coordination with DCFS.

JB Pritzker
Governor



Marc D. Smith
Director

Christine Kahl
Phoenix Community Development Services
202 NE Madison Avenue
Peoria, IL 61602

**RE: Letter of Support for Madison Apartments III, to be located at 206 NE Madison Avenue,
Peoria, IL**

Dear Ms. Kahl:

This letter is to indicate that the Illinois Department of Children and Family Services (DCFS) will work with you to provide referrals for the permanent supportive housing to be available at the above referenced location in Peoria, Illinois. The project proposes to serve homeless youth between ages of 18 and 24 from Peoria, Tazewell, Woodford and Fulton Counties. In Illinois, youth generally age out of DCFS systems at age 21 and many need a range of supportive housing interventions, which your proposed housing development will provide through the services available at Phoenix Community Development Services and through collaborative partnerships with other community agencies. We understand that these apartments will be available to individuals who are at least 18 years of age.

We estimate that approximately 25 youth will age out of DCFS' care from the counties mentioned above every year. These youth could be referred to this housing program. DCFS already administers the Youth Cash Assistance Program that can assist with security deposits, furniture and basic household items when they move into their own housing. This assistance could help our youth move into Madison Apartments III as well.

We look forward to working with Phoenix Community Development Services, as there is a great need for permanent supportive housing for our youth aging out of our programs. Please contact John Egan at 312-328-2269 if you have any questions or concerns about our support.

Sincerely,

A handwritten signature in black ink, appearing to read "Marc D. Smith".

Marc D. Smith
Director



1619 West Jefferson Street • Joliet, Illinois 60453
815-730-4000
www2.illinois.gov/DCFS

11909_Madison Apartments III
206 NE Madison Ave, Peoria IL 61602
I. Coordination of Services

This exhibit outlines the coordination of services that will be provided at Madison Apartments III for the homeless older youth population. The following documents are included in this exhibit:

- **A “Commitment to Provide Supportive Services” by the project sponsor Phoenix Community Development Services** to provide the appropriate supportive services for the residents at the proposed development, Madison Apartments III. Phoenix CDS is a licensed mental health agency and has the capacity to provide the services as described in the attached supportive service plan. The commitment letter also outlines how the services will be provided in coordination with DCFS.
- **An MOU between the sponsor Phoenix Community Development Services and the JOLT Foundation for JOLT** to provide any of the following services to residents of Madison Apartments III:
 - STI testing
 - Educational materials
 - Substance abuse harm-reduction counseling
 - Harm reduction supplies
 - Recovery Coaching
 - Referrals for services
- **A service plan for residents of the proposed project** outlines the services offered to residents, number of proposed staff, and the size and location of the service office. Services include case management, tenancy support services, and access to behavioral health services (which includes substance use and mental health services), among many others.

JOLT Memorandum of Understanding (MOU)

Between JOLT Foundation and:

Name of organization/business: **Phoenix Community Development Services**

The purpose of this MOU is to delineate the agreement between JOLT Foundation and

Phoenix Community Development Services, in providing any of the following free services:


- HIV, HCV, Chlamydia, and Gonorrhea Testing
- Condom/Lubrication Distribution
- Harm Reduction Supplies (i.e., naloxone, fentanyl test strips, etc.)
- Educational Materials
- Substance Use Harm Reduction Counseling (individual and group)
- Medication Assisted Treatment for Opioid Use Disorder
- Recovery Coaching
- Referral(s) for services

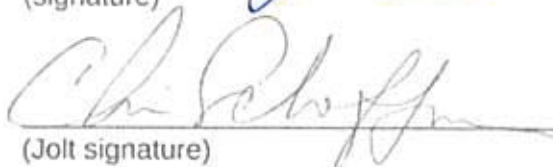
as well as referrals to the **JOLT Harm Reduction Center** for persons who are interested in comprehensive harm reduction services at our drop-in center located at:


1411 NE Adams St., Peoria, Illinois 61603.

I, **Sara Runyon**, as a person who has authority to agree on the date of **October 21st, 2020**, give representatives of JOLT Foundation permission to provide services to our consumers.


(signature)


(date)


(Jolt signature)


(date)



202 N.E. Madison
Avenue
Peoria, IL
61602
Phone 309.674.7310
Fax 309.674.9652
Phoenixcds.org

Commitment to Provide Supportive Services

Christine Moran, Managing Director
Illinois Housing Development Authority
111 E. Wacker Dr., Suite 1000
Chicago, IL 60601

Re: 11909 Madison Apartments III

Ms. Moran:

Please accept this letter as a commitment from Phoenix Community Development Services to provide the appropriate supportive services for the residents at the proposed development, Madison Apartments III. Phoenix CDS is a licensed mental health agency and has the capacity to provide the services as described in the attached supportive service plan.

In addition to the services that our agency provides, we also maintain collaborative relationships and reciprocal service agreements, as appropriate, with a wide range of community service providers in order to meet the needs of the consumers. These linkages include access to mental health services, substance abuse services, primary healthcare services, mainstream resources, financial literacy, etc. Some of our collaborative partners include, but are not limited to:

- Unity Place (formerly Human Service Center) – mental health and substance abuse services;
- JOLT Foundation – substance abuse and harm reduction services;
- Heartland Community Health Center (designated FQHC) – primary healthcare and psychiatric services;
- Dream Center Peoria – furnishings, household goods, and clothing;
- Salvation Army – food services and emergency shelter (contingency/emergency);
- Goodwill Industries – employment services;
- Navicore – financial counseling and budgeting;
- Various Food Bank/network partners (i.e. Midwest food Bank) – food service; and

- Methodist College of Nursing and Illinois Wesleyan University – on-site wellness and preventive healthcare services.

This proposed development is situated in a two-block radius of other program service sites for Phoenix CDS. In addition to the individualized services provided to residents within their own housing unit, residents will also have access to workforce development and behavioral health services within a ½ block walking distance.

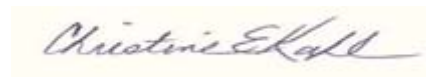
Coordination of Services with DCFS/Child Welfare System

The Illinois Department of Children and Family Services (DCFS) and Children’s Home Association of Illinois (CHAIL) will work with Phoenix CDS to provide appropriate referrals for the permanent supportive housing to be available at the above-referenced location in Peoria, IL. In Illinois, youth generally age out of DCFS systems at age 21 and many need a range of supportive housing interventions, which will be provided through the services currently available at Phoenix CDS, as well as ongoing supportive services provided by CHAIL for its participants. We understand that these apartments will be available to individuals who are at least 18 years of age. We estimate that there are 50 individuals who would be available for this housing over each the next 3 years. Many of the potential residents will qualify for operating funds available through DCFS for rental assistance as well as funds to purchase furnishings and household goods.

DCFS and/or CHAIL will be responsible for the initial identification of an eligible candidate for consideration of entry into supportive housing at Madison Apartments III and for conveying the referral information to Phoenix CDS program staff. If a vacancy exists or there is a known upcoming vacancy, Phoenix CDS will begin coordination of services with DCFS and CHAIL to prepare for the transition. Coordination will largely be comprised of the collection of relevant documents (i.e. DCFS mental health treatment records) and facilitating Medicaid enrollment, if possible. A scheduled move-in date will be arranged based on the DCFS discharge date or the individual’s need. Once the participant has moved into Madison Apartments III, Phoenix CDS will be responsible for the full range of supportive services as described in the Supportive Services Plan included in the application

I would be happy to provide additional information about the proposed services upon request.

Sincerely,



Christine E. Kahl
President/CEO
Phoenix Community Development Services

11909_Madison Apartments III

Phoenix Community Development Services

Supportive Service Plan

Overview of Supportive Services

The supportive services to be offered at Madison Apartments III include comprehensive supportive case management, access to appropriate behavioral health clinical services (i.e. mental health counseling), workforce development training, life skills development, and other tenancy supports through the access to supportive housing. Phoenix CDS' supportive services empower individuals and facilitate improved functioning in the community. Our service model is structured around accepted and standard behavioral health concepts, including evidence-based practices (EBP), particularly Housing First, strengths-based and consumer-centered models of care.

Case management will be offered on site by Phoenix CDS and CHAIL staff utilizing the service space available on the first floor of the development. Madison Apartments III is located at 206 NE Madison Ave, Peoria, IL61602. The case management office space is approximately 112 sq ft in size.

Clinical case management services include, but are not limited to: an initial assessment of needs and eligibility determination; initial comprehensive mental health and level of functioning assessment; emergency assistance; development of an Individualized Service Plan (ISP); bi-annual reassessment and revision of the ISP, as appropriate; linkage to housing, mainstream and other community resources; consultation; counseling (problem-solving); representative payeeship for social security; advocacy; and life skills education and enhancement. All consumers are offered and encouraged to participate in these supportive services. When an unmet need is identified, case managers advocate on behalf of the consumer and work to secure access to the appropriate services in order to progress on their individualized goals towards self-sufficiency.

Phoenix CDS maintains a secure database containing individual information for all program participants in accordance with HIPAA and other regulatory privacy and confidentiality standards. The clinical information provided during the initial assessment and the service goals identified on individual service plans are entered into the database. At least every six months, each consumer's functioning and progress on service plan goals is reassessed and entered into the database. Reports are then generated that provide both individual consumer information and aggregate data for the agency to monitor progress towards participants' individual goals and program objectives.

CHAIL's Homeless Youth staff will also provide age-appropriate supportive services throughout their participants' residency in the project.

Development of Individualized Service Plans

All consumers participate in an initial clinical needs assessment. Through this interactive process, the consumer and case manager identify the immediate needs such as housing, potential income/benefit sources, mental health services, physical health services, substance abuse services, etc. The consumer and his/her assigned case manager then develop an individualized service plan which delineates and prioritizes the needs, the activities to be undertaken to meet those needs, and a timeline for completion of the activities. The service plan activities are monitored monthly for completion and/or progress towards goal completion. Each service plan is reviewed and updated with the consumer at least every six months.

Movement towards Self-Sufficiency

Through supportive case management, participants are linked to mainstream resources and community services immediately. By assisting the individual to achieve permanent housing, one of the primary barriers to achieving self-sufficiency is removed. The case managers are then able to work with each individual to pursue appropriate employment and skill development. Phoenix CDS offers workforce development services to increase participants' ability to sustain employment.

Case managers work with each participant to increase their ability to live independently by providing teaching/coaching on daily living and problem-solving skills, participating in activities on the individual service plans, cultivating relationships for social cohesion, etc. The learned skills contribute to strengthening each participant's confidence and self-esteem, thereby, improving their potential level of self-sufficiency. The ongoing process of re-assessment allows participants to incrementally move towards greater self-sufficiency as they demonstrate their willingness and an ability to do so.

Access to public benefit programs (Medicaid, TANF, food stamps, childcare, etc.)

Utilizing the information collected during the initial assessment and the process of ongoing re-assessment of each consumer's needs, the assigned case manager links consumers to appropriate mainstream resources. The case managers participate in scheduling application appointments and provide relevant information supporting the individual's application for benefits. If needed, the organization serves as the representative payee for benefits. Phoenix CDS utilizes the state's single electronic portal for determination of benefit eligibility and access to benefit applications. Several of Phoenix CDS' staff are also trained in SOAR, an evidence-based practice for assistance in applying for SSI/SSDI.

Assessment of Participant Needs and Determination of the Scope, Frequency and Scheduling of Supportive Services to Meet the Identified Needs

All participants participate in an initial clinical needs assessment. Through this interactive

process, the consumer and case manager identify the immediate needs such as housing, potential income/benefit sources, mental health services, primary healthcare services, substance abuse services, etc. The consumer and his/her assigned case manager then develop an individualized service plan which delineates and prioritizes the needs, activities to be undertaken to meet those needs, and timeline for completion of the activities.

Employment & Education Services

Phoenix CDS provides workforce development services to appropriate consumers seeking employment. These services strive to enhance self-esteem and communication skills for low-income individuals lacking appropriate employment skills and/or lacking a history of stable employment. Services include: life skills and job preparedness training; work experience opportunities; job linkage and placement; and job retention monitoring and support. Participants are referred to other appropriate education programs (i.e. GED, ESL) on an individual appropriate basis.

Therapeutic Recreational Services

The project includes indoor and outdoor space to provide on-site therapeutic recreation activities. These activities will provide opportunities for youth to learn positive social interaction skills that are oftentimes lacking in youth with long-term involvement with the child welfare system. Phoenix CDS will collaborate with various partners, including the local fine arts community, to provide a variety of arts education and entertainment events designed by the youth. The plans for Madison Apartments III include a "Performance Plaza" behind the building to be used by the youth for special events, performances, and other entertainment and enrichment based activities.

Staffing

One full-time equivalent case manager will provide comprehensive supportive case management services for residents of Madison Apartments III PSH. Case management will take place on site at Madison Apartments III. Clinical case management services include but are not limited to: an initial assessment of needs and eligibility determination; initial comprehensive mental health and level of functioning assessment; emergency assistance; development of an Individualized Service Plan (ISP); bi-annual reassessment and revision of the ISP, as appropriate; linkage to housing, mainstream and other community resources; consultation; counseling (problem-solving); representative payeeship for social security or veteran's benefits; advocacy; and life skills education and enhancement.

Madison Apartments III residents will also work with other staff members and community partners that currently provide services to Phoenix CDS residents at the existing supportive housingsites "on campus", such as primary and psychiatric care, workforce and employment

training, substance abuse counseling, food pantry services, and many more.

Funding

The primary funding source for the mental health services to be delivered is Medicaid. Phoenix CDS is a licensed mental health agency and has the existing capacity for submitting Medicaid claims for reimbursement. If a participant is not on Medicaid prior to entry into the program, Phoenix CDS staff will assist the participant in applying for Medicaid. All other supportive services are covered by existing grants from IDHS to provide supportive services (i.e. workforce development, benefits access, life skills development, financial counseling) to persons residing in permanent supportive housing programs. This grant has open capacity to serve participants in any of the agency's supportive housing programs. Additionally, CHAIL's Homeless Youth grant provides the funding for age-appropriate supportive services to be provided by CHAIL throughout their participants' residency in the project.

PSH MARKET ANALYSIS

(To be utilized only for PSH projects seeking ONLY HOME or NHTF)

Name of the Project:	Madison Apartments III
Location of the Project: <i>(include address if available, or nearest intersection, and City/County)</i>	206 NE Madison Avenue, Peoria IL 61602
Preparer Name and Affiliation (Company):	Christine Kahl, Phoenix Community Development Services

PROJECT DESCRIPTION

Targeted Population(s) to be served:	Homeless Youth ages 18-24
Total number of units:	16
Number of units by AMI and Bedroom Type:	9 studio apts @ 30% AMI; 7 1-bedroom apts @ 30% AMI
Proposed rents by each bedroom type and AMI level:	4 LTOS studio apts @ 30% AMI = \$625; 3 LTOS 1-bedroom apts @ 30% AMI = \$825; 5 CHAIL studio apts @ 30% AMI = \$631; 4 CHAIL 1-bedroom apts @ 30% AMI = \$675
Anticipated subsidies:	9 units from child welfare collaborative partner; 7 units from LTOS
List of Unit/Development Amenities:	recreational activity room; supportive service office; computer lounge; laundry; outdoor performance patio
How do these amenities relate to the population(s) to be served:	recreational activity room and outdoor performance patio focusing on fine arts and other therapeutic recreational activities designed to foster positive social interaction and other life skills; supp

DEFINED MARKET AREA: Please define a market area that makes sense for your project. IHDA leaves this decision up to preparer, but reserves the right to seek a revised Market Area if the Market Area is too large or otherwise ineffective. Market areas should be chosen by Census Tract or other geographies that easily align with common data aggregation.

Describe the PMA:	Peoria, Tazewell, Woodford, and Fulton Counties; Cities of Peoria and Pekin, IL
Describe how the PMA was determined:	HUD defined region for IL-507 Homeless Continuum of Care
List the Census Tracts within the PMA : <i>(FIPS codes)</i>	100 individual census tracts - see 4 attachments
Attach a map of the PMA:	Attached

LOCAL MARKET TRENDS

Population: <i>(trends and 5 year estimates)</i>	383,781 - see attached Census data
Households : <i>(trends and 5 year estimates)</i>	155,983 - see attached Census data

DEMAND ANALYSIS

Provide statistics/counts of homelessness: <i>(i.e. HMIS and PIT count data)</i>	IL-507 CoC Point-in-Time 2021 PIT data - total homeless households = 185 and total homeless persons = 202 (16 persons in PIT count between ages 18-24). IL-507 CoC Coordinated Entry System data as of 10/21/2021 show total homeless households = 317 and total homeless persons = 427. CHAIL Homeless Youth data = 158 homeless youth over past three years. CHAIL projects 50 homeless youth will be in need of permanent housing each year over the next 3 years.
Provide other special needs population counts: <i>(i.e. group homes, nursing homes)</i>	According to DCFS data as of 9/30/2021, the identified PMA had 1,688 youth in DCFS' care. Other special need populations are outside eligibility scope of targeted population for this project.
Provide PAIR Module data: <i>(obtained from IHDA)</i>	Pulled from IHDA SRN website: total # of interested applicants = 122; studio = 89; 1-br = 108
Statement of how the proposed matches the local need shown by the above data:	The CoC has identified the targeted homeless youth population as a growing concern with a notable lack of PSH units for this sub-group. The CHAIL provided trend data that shows an increase of the number of homeless youth presenting to their program over the past 5 years - 50 homeless youth this past fiscal year.

SUPPLY ANALYSIS	
Discuss other projects in the PMA that target a similar population(s): <i>(include number of units, unit types, occupancy levels and waiting list information)</i>	There are currently only 3 dedicated PSH beds/units specific to the Homeless Youth ages 18-24 within the CoC's service region. Across the CoC, there are 267 PSH beds for homeless households without children and 189 PSH beds for homeless households with children.
COMPETITIVE ANALYSIS	
Discuss how the proposed will compare to the projects noted in the supply analysis above:	This proposed PSH project will meet the unique needs of homeless youth ages 18-24. Less than 1% of the current PSH bed capacity is set aside for this population. This project would increase the capacity for the targeted population by more than 500%
CONCLUSIONS	
Describe the strengths and weaknesses of the proposed: <i>(in terms of location, proposed product/unit types and in relation to the population served)</i>	The primary strength is proximity to other critical supportive services throughout Phoenix CDS' service capacity, including mental health and workforce development services, while providing age-appropriate supportive housing setting. Another strength is the on-site amenities that address therapeutic recreational needs of developing youth that helps transition to independence and self-sufficiency. A weakness of the proposed development is that it is located in a predominantly low income census tract; however, the housing market in the downtown area is trending up for market rate housing at this time.
Assess the demand for the proposed: <i>(Based on the provider information obtained, as well as occupancies at any existing competitive developments)</i>	As indicated, this proposed project will increase the available PSH for homeless youth ages 18-24 by more than 500%. The CoC's Coordinated Entry System prioritizes placement into its limited PSH through a standard assessment process that largely focuses on vulnerability. Homeless youth in this age range are oftentimes placed lower on this vulnerability ranking than homeless adults with numerous disabling conditions and health fragility. A dedicated project for this target population creates the opportunity for them to access needed PSH without being passed over in the current system. CHAIL projects 50 homeless youth will need permanent housing in each of the next 3 years.
Make any recommendation(s) as to needed changes to what has been proposed, based upon final conclusions. Provide an explanation of these required changes:	No recommended changes at this time.
Date form was completed:	10/21/2021

Developer/Property Manager Profile

Contact Information:

Developer/Sole Member of the General Partner:

Phoenix Community Development Services
202 NE Madison
Peoria, IL 61602
Christine Kahl – President/CEO
309.222.2560
director@phoenixcds.org

Property Manager:

Phoenix Community Development Services
202 NE Madison
Peoria, IL 61602
Christine Kahl – President/CEO
309.222.2560
director@phoenixcds.org

Project Sponsor/Ownership Information:

The project will be owned by Madison Apartments III, LLC. Phoenix Community Development Services (Phoenix) (formerly known as South Side Office of Concerns) will be the managing non-profit member. Founded in 1982 and later incorporated in 1985, Phoenix is a not-for-profit social service agency that provides various, comprehensive supportive housing, services and resources to individuals in Peoria and the surrounding community areas including homeless, veterans and those with mental, social, or physical disabilities, with a mission of helping individuals toward self-sufficiency. The support provided falls in the areas of community support services, supportive housing services, homeless outreach and re-housing efforts, and community development. The Phoenix Board of Trustees is comprised of community members from a variety of backgrounds such as education, banking, community activism, law, real estate, and management.

The development team has much experience with affordable housing. CORE Construction (CORE) will act as general contractor on the proposed project. CORE Construction has years of expertise in multifamily construction, and has completed over 1,742 units for families and seniors in Illinois and throughout the country, with a significant amount of these units financed by public funds including Low Income Housing Tax Credit, HOME loan funds, Public Housing Authority capital funds, and grant assistance from such organizations as the Federal Home Loan Bank (FHLB) and the former Department of Commerce and Economic Opportunity (DCEO) Energy Grant program, to name a few. CORE will be part of the proposed development through stabilization, offering their expertise in construction of affordable housing.

Phoenix has over ten (10) continuous years of prior development and/or ownership experience in multifamily residential project that now total six (6) sites. Phoenix has not experienced a foreclosure or bankruptcy in the last three (3) years, nor has unresolved HUD or State negative compliance findings.

Developer/Property Manager Profile

Phoenix is an Illinois based 501c3, charitable, tax-exempt organization. Their vision is to end homelessness in Fulton, Peoria, Tazewell and Woodford Counties by ensuring access to permanent, safe and affordable housing.

Overview of Leasing History

Phoenix will serve as the project's property manager and has extensive experience managing multifamily apartments, affordable senior housing, and special needs housing, working with multiple LIHTC and HUD-financed projects in the Peoria area. It currently provides management and oversight to approximately 150 units in 7 housing developments throughout Peoria and the surrounding communities, overseeing management and maintenance of the units. Madison II is currently under construction and will also be managed by Phoenix when it is complete. Please see a detailed experience certification attached.

A Management Plan is attached as Exhibit 2. This management plan is from Madison Apartments I and details the duties and responsibilities of the management company as well as the owner for effective management of the proposed development. In accordance with this RFP, the proposed property will be managed and evaluated based on sound policies and procedures as defined by the management plan. The Madison Apartments III management plan will be very similar to Madison Apartments I.

Key personnel are extensively trained in the required fields related to property management for HUD developments. Staff have the following experience, training and certifications: Fair Housing Specialist Certification, Certified Occupancy Specialist training, Rental Housing Finance training, two years' experience as HOME compliance officer for municipal government, Tax Credit Specialist training and certification test scheduled for 5/19/2020. The company and its staff are experienced in maintaining the files and records necessary for compliance monitoring of affordable housing and reporting to investors, lenders and state/federal agencies.

Phoenix is experienced at meeting affordability and PHA requirements, including marketing and outreach under an Affirmative Fair Housing Marketing Plan, leasing units according to the Tenant Selection Plan, and compliance.

Phoenix has been providing supportive services since its incorporation in 1985, using a variety of funding sources and donations, and has been developing and providing permanent supportive housing and associated supportive services since 1989. The organization is committed to providing comprehensive, supportive services to its most vulnerable citizens who face great challenges. The primary goal is to end homelessness and provide individuals, families, and veterans with a warm, safe place to live independently. Among services provided to residents are supportive counseling services to set and achieve goals, make healthy life choices, find employment, build skills, and become stable, self-sufficient members of society.

Please refer to the enclosed Property Manager Experience Certification for a comprehensive breakdown of properties managed.

Developer/Property Manager Profile

As a Sponsor/Owner, Phoenix has ownership in over 164 units. These developments include:

Development	Location	Type	# Units	Governmental Funding Sources
HHH Housing	Peoria, IL	New	5	HUD CoC Program
Monroe Manor	Peoria, IL	New	10	HUD CoC Program/TBRA-State and Federal
Oasis	Peoria, AR	New	6	HUD CoC Program
New Hope Apartments	Peoria, IL	Rehab	84	Low Income Housing Tax Credits/PBV/HUD Program/Historic Tax Credits
Veterans Haven	Peoria, IL	Rehab	15	VA Contract
Glendale Commons	Peoria, IL	New	28	LIHTC/FHLB/IHDA BIBP
Madison Apartments	Peoria, IL	Rehab	10	IHDA Trust Fund/LTOS Program
Madison II Apartments	Peoria, IL	New	24	IHDA Trust Fund/National Housing TF/PBVs

A more detailed Developer Experience Certification is attached.

Previous Experience with Section 8

South Side Office of Concern participation as owner under the Section 8 Program:

Project: New Hope Apartments
Building: Rehab
Address: 301 NE Jefferson, IL
Total # Units: 84
Housing Program: Section 8 Project Based Rental Assistance
Total # Vouchers: 30
Gov't Funding Source: LIHTCs / PBVs

Project: Frontiers West Apartments (SSOC as Contracted Property Manager)
Building: New Construction
Address: 3432 Molleck Drive
Peoria, IL 61604
Total # Units: 11
Housing Program: Section 8 Project Based Rental Assistance
Total # Vouchers: 11
Gov't Funding Source: HUD 202/8

Madison II also has project-based rental assistance from the Peoria Housing Authority. This project is still under construction.

MANAGEMENT PLAN

Project:	MADISON AVENUE APARTMENTS
Project Sponsor/Owner:	To Be Formed LLC
Financing Agent:	IHDA
Managing Agent:	South Side Office of Concern

SECTION A – Sponsor/Owner

South Side Office of Concern (hereafter “SSOC”) has agreed to provide complete management services for the above-named Project. Such management services will be consistent with all Federal and State laws and mandates concerning equal opportunity in housing and in employment regardless of race, color, creed, sex, national origin or sexual orientation.

SSOC currently owns and/or sponsors six (6) supportive housing programs and previously operated and managed another supportive housing program. All but one (1) of these programs is/was managed by SSOC itself, including:

- Glendale Commons, 802 NE Glendale Avenue, Peoria, IL 61603
- Monroe Manor, 605-609 NE Monroe Street, Peoria, IL 61603
- Phoenix House, 1316 SW Adams, Peoria, IL 61605 (developed and operated for 15 years – re-located and subsumed by New Hope Apartments in 2008)
- OASIS, 611 NE Monroe Street, Peoria, IL 61603
- Veterans Haven, 711 NE Monroe Street, Peoria, IL 61603 and
- HHH, scattered site single family homes, Peoria, IL 61602.

In the six aforementioned projects, SSOC provides all management services and all supportive services. All six projects serve homeless individuals and/or families with a disabling condition.

New Hope Apartments LLC, located at 301 NE Jefferson Street, Peoria, IL 61603, is a LIHTC project and it uses a third-party management agent, *Robert Cottingham Property Management Company*. This project is a partnership between SSOC and another not-for-profit company, Peoria Opportunities Foundation (POF). In this partnership, SSOC has 51% owner interest. SSOC is the on-site supportive service provider for this project as well.

SSOC also managed another HUD-funded transitional housing program from October 2012 through February 2015 at the request of HUD. During that period, SSOC provided management training and technical assistance to a faith-based not-for-profit company in order for that company to ultimately assume management of the project.

Glendale Commons, the aforementioned supportive housing program, was funded by IHDA through the Permanent Supportive Housing Program. It was a project that included demolition, rehabilitation, and new construction and came on line in June 2016. SSOC provides management at that property and completed 100% occupancy within the first 90 days.

SECTION B – Project Managing Agent

1. Managing Agent

South Side Office of Concern
202 NE Madison Avenue
Peoria, IL 61602
(309) 674-7310
Fax (309) 674-9652
Email: director@southsideofficeofconcern.org

2. Type and Length of Business

SSOC is a not-for-profit company that has been in operation for 35 years. SSOC currently operates in Illinois only.

3. Principals

- Christine Kahl, President/Chief Executive Officer
 - 33 years not-for-profit experience with special needs populations
 - 29 years not-for-profit progressive management and administrative experience
 - 14 years' experience developing, owning, operating and managing supportive housing programs
- Robert Cobler, Vice President/Chief Financial Officer
 - 29 years in fiscal management, accounting and financial auditing
 - Member of a development team that oversaw the development of two major public housing developments at the Peoria Housing Authority
 - 5 years' experience managing supportive housing programs at SSOC
- Sara Runyon, Vice President/Chief Operating Officer
 - 2 years in non-profit management and administration
 - 5 years direct clinical service with homeless persons with mental illness
 - Licensed Clinical Social Worker (LCSW)
- Joseph Rodriguez, Property Manager/Housing Developer

- 2 years in property management and housing development experience
- Participating in current development of 10-unit PSH project
- Undergraduate and graduate educational background in mathematics
- Served in the U.S. Marine Corps

4. *Certifications*

- Certified Occupancy Specialist – Joseph Rodriguez
- Fair Housing and Affirmative Marketing certifications – pending March 2018 for Joseph Rodriguez
- Blended Occupancy Specialist – pending June 2018 for Joseph Rodriguez

5. *Organizational Structure*

A. Number of Employees by Category (includes open positions) = 46

- Supervisory – 10 FTE's
- Clerical/Support – 3 FTE's
- Maintenance – 2 FTE's
- Accounting – 2 FTE's
- Leasing – 1.5 FTE's
- Social Services – 27.5 FTE's

B. Minority Employees

African American – 1 supervisory and 13.5 social services
 Latino – 1 supervisory

SSOC makes a concerted effort to recruit and hire consumers and/or persons with lived experience into positions based on appropriateness and qualifications. As such, SSOC currently employs 12 current or former consumers in the aforementioned positions.

C. Management Responsibility

SSOC has an executive management team comprised of a Chief Executive Officer, a Chief Financial Officer, and a Chief Operating Officer. Christine Kahl, President/CEO, is responsible for the agency's management staff.

6. *Current Housing Developments*

All developments managed by SSOC are supportive housing programs for homeless persons or families with disabling conditions, including:

<i>Name</i>	<i># Units</i>	<i>Type</i>	<i>Location</i>	<i>IHDA</i>
Glendale Commons	28	PSH	802 NE Glendale Ave, Peoria, IL	X
OASIS	6	PSH	611 NE Monroe Ave., Peoria, IL	
Monroe Manor	10	PSH	605-609 NE Monroe Ave., Peoria, IL	
Veterans Haven	16	PSH	711 NE Monroe Ave., Peoria, IL	
HHH	6	PSH	scattered sites	

7. *Unsatisfactory History with Developments*

SSOC has no history of managing developments that resulted in mortgage default, mortgage relief, or foreclosure.

SECTION C – Project Management Plan

I. Relationship and Responsibilities of Owner/Sponsor and Managing Agent

- A. The primary role of SSOC for the project is that of Managing Agent. As Managing Agent, SSOC will ensure that the standards and practices of the Sponsor/Owner, To Be Formed LLC, are upheld and carried out. Both Owner and SSOC will execute a Management Contract consistent with Federal guidelines as the instrument of authority. Both Owner and Manager are charged with specific performance in accordance with the Management Contract and the IHDA Regulatory Requirements as part of the Management Contract.
- B. SSOC will be Managing Agent for THE OWNER and will be responsible for the day-to-day operation of the Project. It will have general supervisory responsibilities over basic principles and policies, and the execution of the duties and services as outlined in the Management Plan.

As the Managing Agent, SSOC will have full responsibility for both physical maintenance, and the financial administration of the development within policy guidelines established through consultation with THE OWNER and will be responsible to THE OWNER for all its actions in the operation of the development.

SSOC’s responsibilities include:

- 1. Hiring of all managerial and accounting personnel necessary for the effective discharge of the duties of the Managing Agent. The Managing Agent will also determine an operating schedule, set job standards and wage rates, investigate, hire, pay, supervise and discharge all property management personnel in order to properly maintain and operate the development.

Sponsor Development Experience Summary by State

Sponsor: Phoenix Community Development Services

Sponsor Development Experience Summary by State

Sheet	State	Total Project Units	Income Restricted Units	PSH Projects
IL	IL - Illinois	213	152	181
Other State(s)	Other State(s)	0	0	0

Unacceptable Practices Summary

Practice #	Indicated	Explained
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
(11)		
(12)		

Identity of Interest Summary

Indicate	Between
	Sponsor & GC
	Sponsor & Seller
	Sponsor & Seller & GC

I hereby certify that the information summarized above and contained within this workbook and Application, pertaining to the property manager experience of Phoenix Community Development Services is true, correct, and complete. I understand that any misrepresentation, false information, or omission may result in disqualification of this Application.

Sponsor: Phoenix Community Development Services

Signature: Christine E Kahl

Printed: Christine E Kahl

Its: President/CEO

Date: 8/12/2020

Corporate Credit Card Policy

The following is the policy for obtaining a corporate credit card and guidelines for its use. The type of credit card obtained and the number of authorized cardholders/signers for the account, will be determined jointly by the President/CEO and the VP/CFO, with input, as appropriate, from the Board of Trustee's Executive Committee. The criteria for choosing the card will be acceptability, annual fees, monthly payment terms and interest charge terms. Rebates or accumulation of points will be a secondary concern.

All corporate credit cards are to be kept secured in the agency's safe located in the Administrative office. The Board of Trustees' Executive Committee authorizes the President/CEO to designate an authorized cardholder(s) as appropriate and necessary for conducting agency business.

The use of the corporate credit card is to facilitate purchasing supplies on-line, paying for seminar and travel costs, buying supplies from approved vendors and/or in bulk at certain buying clubs and those other business related purposes jointly approved by the President/CEO and the VP/CFO. An employee may request use of the corporate credit for appropriate expenses by completing and submitting a *Credit Card Request Form* and securing approval in advance of use by the President/CEO and/or the VP/CFO. Unauthorized use or misuse of the card(s) is the personal responsibility of the person using the card. Personal use is an unauthorized use of the card(s).

Except when circumstances would deem otherwise, the account balance of the corporate card should be paid in full when the monthly statement is received. Incurring interest charges should be avoided.

When the monthly statement is received, the charges must be reviewed and approved following the agency's expense approval policy. The individual expenses must be allocated to the proper expense categories for bookkeeping and accounting purposes.

All charge receipts must be retained and attached to the monthly statement when it is received. The same documentation necessary for the issuance of a check, is also necessary for the use of the credit card. Both the credit card receipts and the necessary documentation must be attached to the statement before payment can be approved.

Interest Earned On Grant Funds Policy

In accordance with specific policies of various funding entities, any grant funds disbursed to SSOC and held thirty (30) days by the agency will be placed in an interest-bearing account. Any interest earned will be applied to the specific cost center and reported as required to the funder.

Sponsor Development Experience Certification

Sponsor: Phoenix Community
State: IL - Illinois

PSH Sponsor Development Experience			
Approved	Under Construction	Complete	Total Managed
16	0	165	181
1	0	7	8

PSH Units: _____
Projects w/PSH Units: _____

Indicate all housing development projects in IL in which Phoenix Community Development Services has had an ownership interest in the cells below.

State	Project Name	Primary Project Address	Project Municipality(ies)	Target Population	Tenant Selection Plan (TSP) Special Needs Designation(s), if any eg. Homeless, Veterans, Physically Disabled	Total Project Units	Income Restricted Units	LIHTC Units	PSH Units: Includes VASH, HUD 811/202, SRN, and Continuum of Care/Hearth Act	Project Status	Completion Date MM/DD/YYYY
Incomplete						213	152	84	181		
IL	HHH Housing	Scattered Sites	Peoria	Family & Special Needs	disabling condition					Complete	4/1/1989
IL	Phoenix House	225 Pecan	Peoria	Elderly & Special Needs	disabling condition	30	0	0	30	Complete	3/1/1993
IL	Solo/Monroe Manor	609 & 605 NE Monroe	Peoria	Elderly & Special Needs	disabling condition	10	0	0	2	Complete	4/1/1998
IL	Oasis	611 NE Monroe	Peoria	Elderly & Special Needs	disabling condition	6	6	0	6	Complete	10/1/2002
IL	New Hope Apartments	301 NE Jefferson	Peoria	Elderly & Special Needs	disabling condition	84	84	84	84	Complete	3/1/2008
IL	Veterans Haven	711 NE Monroe	Peoria	Elderly & Special Needs	disabling condition	16	0	0	0	Complete	10/31/2013
IL	Glendale Commons	802 NE Glendale	Peoria	Family & Special Needs	disabling condition	28	28	0	28	Complete	4/1/2016
IL	Madison Apartments	202 NE Madison Avenue	Peoria	Family & Special Needs	disabling condition	10	10	0	10	Complete	11/15/2018
IL	Madison II Apartments	210 NE Madison Avenue	Peoria	Family & Special Needs	disabling condition	24	24	0	16	Approved	estimated completion date 9/30/2021
IL											
IL											
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Comments:

Development Costs
20220811 Madison III City of Peoria HOME

Budget Line Item	Budget	Per Unit
Building Cost	295,000	18,438
Title and Transfer Taxes	5,000	312
Acquisition Total:	300,000	18,750
Demolition	31,481	1,968
Site Work	110,478	6,905
Net Construction Costs	2,793,529	174,596
General Conditions	165,672	10,354
Overhead	55,224	3,452
Profit	165,672	10,354
Bond Premium / LOC fee	20,913	1,307
Utility Fees	20,000	1,250
Building Permits	31,000	1,938
Contingency	146,774	9,173
Construction Total:	3,540,743	221,297
Builders Risk Insurance	11,499	719
Real Estate Taxes	10,000	625
Security	30,000	1,875
Construction Period Total:	51,499	3,219
Architect -- Design	143,255	8,953
Architect -- Supervision	61,395	3,837
Engineering Fees	29,900	1,869
Furniture Fixtures & Equipment	33,300	2,081
Predevelopment Interest	25,000	1,562
Legal - Organizational	50,000	3,125
Plats & Surveys	10,000	625
Appraisal	2,000	125
Environmental Reports	10,000	625
Soils and Material Testing	20,000	1,250
Market Study	5,500	344
Title & Recording Fees	13,500	844
Green Certification Fees	17,120	1,070
Professional Fees Total:	420,970	26,310
Lease-Up Expense	7,500	469
Marketing & Leasing Total:	7,500	469
Application Fee	750	47
Lender Legal Costs	25,000	1,562
Lender Fees Total:	25,750	1,609
Developer Fee	370,196	23,137
Consultant Fee	150,000	9,375
Developer Fee Total:	520,196	32,512
Relocation	10,000	625
Tenant Relocation Total:	10,000	625
Tax & Insurance Escrow	10,500	656
Replacement Reserve	24,000	1,500
Operating Deficit	52,772	3,298
Reserves Total:	87,272	5,454
Total Development Cost	4,963,930	310,245