



Wauwatosa, WI

Financial Affairs Committee

Meeting Agenda - Final

7725 W. North Avenue
Wauwatosa, WI 53213

Tuesday, April 9, 2024

7:30 PM

Committee Room #1 and Zoom:
<https://servetosa.zoom.us/j/81144274572>,
Meeting ID: 811 4427 4572

Regular Meeting

HYBRID MEETING INFORMATION

Members of the public may observe and participate in the meeting in-person or via Zoom at the link above. To access the Zoom meeting via phone, call 1-312-626-6799 and enter the Meeting ID.

CALL TO ORDER

ROLL CALL

FINANCIAL AFFAIRS COMMITTEE ITEMS

1. Consideration of request from the City Engineer for Amendment Number 1 of the State Municipal Agreement with the Wisconsin Department of Transportation for the Mayfair Road repaving project between Burleigh Street and Silver Spring Drive (CIP Project 1122) [24-0525](#)
2. Recommendation for approval of a term sheet with Wingspan Development Group for a multifamily housing development, the Foundry, at the Mayfair Collection (11220 W. Burleigh Street) and approval of associated contracts with Mannedge Consulting and Prism Technical [24-0530](#)

The Committee may convene into closed session regarding this item pursuant to Wis. Stat. §19.85 (1)(e), to deliberate or negotiate the purchasing of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session. The Committee may reconvene into open session to consider the balance of the agenda.

ADJOURNMENT

NOTICE TO PERSONS WITH A DISABILITY

Persons with a disability who need assistance to participate in this meeting should call the City Clerk's office at (414) 479-8917 or send an email to tclerk@wauwatosa.net, with as much advance notice as possible.



Staff Report

File #: 24-0525

Agenda Date: 4/9/2024

Agenda #: 1.

Consideration of request from the City Engineer for Amendment Number 1 of the State Municipal Agreement with the Wisconsin Department of Transportation for the Mayfair Road repaving project between Burleigh Street and Silver Spring Drive (CIP Project 1122)

Submitted by:

Bill Wehrley, City Engineer

Department:

Public Works, Engineering Division

A. Issue

Approve an amendment to the State Municipal Agreements (SMA) we have with the Wisconsin Department of Transportation (DOT) for City costs associated with the Mayfair Road repaving from Burleigh to Silver Spring.

B. Background/Options

In December of 2022, we entered into a SMA with the Wisconsin DOT to repave Mayfair Road from Burleigh to the north city limits (Common Council R-22-213). Construction of this project is anticipated to occur in either 2025 or 2027. Since the approval of that agreement, the DOT has refined their construction cost estimate and costs have gone up. Below are the items that have adjusted that cost:

- Real estate acquisition with Milwaukee County
- Retaining wall costs
- Increased street light locations
- Re-estimation of various other bid items

The revised SMA is attached.

C. Strategic Plan (Area of Focus)

Priority 2: Public Safety Goal 2, Proactively address pedestrian, bicycle, and vehicle safety.

Priority 3: Infrastructure, Goal 2, Ensure the City's infrastructure supports public health through multimodal transportation and recreational opportunities.

D. Fiscal Impact

The total estimated cost of the project increased from \$20,493,700 to \$21,236,800. The estimated cost for the City funded items increased from \$1,230,272 to \$1,802,818. Funding for our share of the additional costs of project will be included the proposed 2025-2029 Capital Improvements Plan (CIP project 1122). Final costs will be determined by final design and bid prices.

E. Recommendation

Authorize staff to execute Amendment Number 1 of the State Municipal Agreement with the DOT for the repaving of Mayfair Rd.



1st Revision
STATE/MUNICIPAL FINANCIAL
AGREEMENT FOR A STATE- LET
HIGHWAY PROJECT

This agreement supercedes the agreement signed by the Municipality on December 7, 2022 and signed by DOT on December 14, 2022

Revised Date: February 22, 2024
Date: October 13, 2022
I.D.: 2030-10-01/21/22/71
Road Name: STH 100
Title: N MAYFAIR RD/N LOVERS LN
Limits: W BURLEIGH ST TO W SILVER SPRING DR
County: Milwaukee
Roadway Length: 2.89 Miles

The signatory **City of Wauwatosa**, hereinafter called the Municipality, through its undersigned duly authorized officers or officials, hereby requests the State of Wisconsin Department of Transportation, hereinafter called the State, to initiate and affect the highway or street improvement hereinafter described.

The authority for the Municipality to enter into this agreement with the State is provided by Section 86.25(1), (2), and (3) of the Statutes.

NEEDS AND ESTIMATE SUMMARY:

Existing Facility - Describe and give reason for request: Improvement

Proposed Improvement - Nature of work: As determined by project scoping.

Describe non-participating work included in the project and other work necessary to finish the project completely which will be undertaken independently by the municipality: A nominal amount is included to cover items in paragraph 4 (to be adjusted in the final plan).

TABLE 1: SUMMARY OF COSTS						
Phase		Total Est. Cost	Federal/State Funds	%	Municipal Funds	% *
Preliminary Engineering: Plan Development		\$ 1,435,500	\$ 1,435,500	100%	\$ -	0%
Real Estate Acquisition:						
Acquisition for roadway (21 ID)		\$ 140,000	\$ 140,000	100%	\$ -	0%
Acquisition for sidewalk (22 ID)		\$ 90,000	\$ -	0%	\$ 90,000	100%
Compensable Utilities		\$ -	\$ -	100%	\$ -	0%
¹ Construction:						
Participating		\$ 11,795,100	\$ 11,795,100	100%	\$ -	0%
Structures B40-1029 & 1030		\$ 6,125,500	\$ 5,904,982	96.4%	\$ 220,518	3.6%
Sidewalk		\$ 330,000	\$ 158,400	48%	\$ 171,600	52%
¹ Nonparticipating:						
Roadway		\$ 120,000	\$ -	0%	\$ 120,000	100%
Retaining walls (R729 & 730)		\$ 590,600	\$ -	0%	\$ 590,600	100%
Retaining walls (R731 & 732)		\$ 490,100	\$ -	0%	\$ 490,100	100%
Structure aesthetics		\$ 105,000		0%	\$ 105,000	100%
Utilites (Water Works)		\$ 10,000	\$ -	0%	\$ 10,000	100%
Utilites (Sanitary Sewer)		\$ 5,000	\$ -	0%	\$ 5,000	100%
Total Cost Distribution		\$ 21,236,800	\$ 19,433,982		\$ 1,802,818	
1. Estimates include construction engineering						

This request shall constitute agreement between the Municipality and the State; is subject to the terms and conditions that follow (pages [2] – [4]); is made by the undersigned under proper authority to make such request for the designated Municipality, upon signature by the State, upon fully executed signature of applicable State Municipal Maintenance Agreement and delivery to the Municipality. The initiation and accomplishment of the improvement will be subject to the applicable federal and state regulations. No term or provision of neither the State/Municipal Financial Agreement nor any of its attachments may be changed, waived or terminated orally but only by an instrument in writing executed by both parties to the State/Municipal Financial Agreement.

Signed for and in behalf of the City of Wauwatosa (please sign in blue ink)			
Name (print)	Dennis R McBride	Title	Mayor
Signature		Date	
Name (print)	Steven A Braatz, Jr	Title	City Clerk
Signature		Date	
Name (print)	John Ruggini	Title: Finance Director	

Signature	Date
Approved as to form and execution	
Name (print) Alan Kesner	Title City Attorney
Signature	Date
Signed for and in behalf of the State (please sign in blue ink)	
Name Tony Barth	Title WisDOT SE Region Planning Chief
Signature	Date

TERMS AND CONDITIONS:

1. The Municipality shall pay to the State all costs incurred by the State in connection with the improvement which exceeds federal/state financing commitments or are ineligible for federal/state financing. Local participation shall be limited to the items and percentages set forth in the Summary of Costs table, which shows Municipal funding participation. In order to guarantee the Municipality's foregoing agreements to pay the State, the Municipality, through its above duly authorized officers or officials, agrees and authorizes the State to set off and withhold the required reimbursement amount as determined by the State from General Transportation Aids or any moneys otherwise due and payable by the State to the Municipality.
2. Funding of each project phase is subject to inclusion in an approved program and per the State's Facility Development Manual (FDM) standards. Federal aid and/or state transportation fund financing will be limited to participation in the costs of the following items as specified in the Summary of Costs:
 - (a) Design engineering and state review services.
 - (b) Real Estate necessitated for the improvement.
 - (c) Compensable utility adjustment and railroad force work necessitated for the project.
 - (d) The grading, base, pavement, curb and gutter, and structure costs to State standards, excluding the cost of parking areas.
 - (e) Storm sewer mains, culverts, laterals, manholes, inlets, catch basins, and connections for surface water drainage of the improvement; including replacement and/or adjustments of existing storm sewer manhole covers and inlet grates as needed.
 - (f) Construction engineering incidental to inspection and supervision of actual construction work, except for inspection, staking, and testing of sanitary sewer and water main.
 - (g) Signing and pavement marking necessitated for the safe and efficient flow of traffic, including detour routes.
 - (h) Replacement of existing sidewalks necessitated by construction and construction of new sidewalk at the time of construction. Sidewalk is considered to be new if it's constructed in a location where it has not existed before.
 - (i) Replacement of existing driveways, in kind, necessitated by the project.

- (j) New installations or alteration resulting from roadway construction of standard State street lighting and traffic signals or devices. Alteration may include salvaging and replacement of existing components.
- 3. Work necessary to complete the improvement to be financed entirely by the Municipality or other utility or facility owner includes the following items:
 - (a) New installations of or alteration of sanitary sewers and connections, water, gas, electric, telephone, telegraph, fire or police alarm facilities, parking meters, and similar utilities.
 - (b) New installation or alteration of signs not necessary for the safe and efficient flow of traffic.
 - (c) Roadway and bridge width in excess of standards.
 - (d) Construction inspection, staking, and material testing and acceptance for construction of sanitary sewer and water main.
 - (e) Provide complete plans, specifications, and estimates for sanitary sewer and water main work. The Municipality assumes full responsibility for the design, installation, inspection, testing, and operation of the sanitary sewer and water system. This relieves the State and all of its employees from the liability for all suits, actions, or claims resulting from the sanitary sewer and water system construction.
 - (f) Parking lane costs.
 - (g) Coordinate, clean up, and fund any hazardous materials encountered for city utility construction. All hazardous material cleanup work shall be performed in accordance to state and federal regulations.
- 4. As the work progresses, the Municipality will be billed for work completed which is not chargeable to federal/state funds. Upon completion of the project, a final audit will be made to determine the final division of costs.
- 5. If the Municipality should withdraw the project, it shall reimburse the State for any costs incurred by the State in behalf of the project.
- 6. The work will be administered by the State and may include items not eligible for federal/state participation.
- 7. The Municipality shall, in cooperation with the State, assist with public relations for the project and announcements to the press and such outlets as would generally alert the affected property owners and the community of the nature, extent, and timing of the project and arrangements for handling traffic within and around the project.
- 8. Basis for local participation:
 - (a) Funding for preliminary engineering 100% Federal/State
 - (b) Funding for real estate required for standard roadway construction, 100% State.
 - (c) Funding for real estate for sidewalk installation along STH 100 and STH 190 100% Municipal
 - (d) Funding for construction of standard roadway items – 100% Federal/State.
 - (e) Funding for structures B40-1029 and B40-1030, 96.4% Federal/State and 3.6% Municipal. Costs for an additional 12 feet of structure and 3 feet of sidewalk needed to accommodate the Oak Leaf Trail Path under the structure are 100% Municipal costs and calculated to 3.6% of the total structure costs.
 - (f) Funding for new sidewalk, 48% Federal/State 52% Municipal. Sidewalk cost share is made up of the following segments as depicted in Exhibit 1 on page 6:
 - a. Resurface portion south of the bridge on the STH 100 project 80% Federal State 20% Municipal

for standard 5' walk, and 100% Municipal for the additional 3' walk. (Zone 1)

- b. Reconstruction portion on STH 100 and along STH 190 100% Federal/State of standard 5' walk, and 100% Municipal for the additional 3' walk. (Zone 2)
 - c. Resurfacing portion north of the bridge on STH 100 is 100% Municipal for 8' walk. (Zone 3)
 - d. Capitol Dr under ID 2025-20-00 included with this project and approved by OAPM at the March 9th, 2021, meeting 100% Federal/State of standard 5' walk, and 100% Municipal for the additional 3' walk. (Zone 4)
- (g) Funding for non-participating items 100% Municipality. Items included as non-participating include: Fencing, pedestrian curb at the soldier pile walls and the sidewalk in zone 3, Multi-use path, roadway lighting outside of the bridge needs, retaining walls R04-729 and R40-730 needed for the multi-use trail, Soldier pile retaining walls R40-731 and R40-732 required to protect trees for the County Park, structure aesthetics, and Sanitary Sewer adjustments.

Comments and Clarification: This agreement is an active agreement that may need to be amended as the project is designed. It is understood that these amendments may be needed as some issues have not been fully evaluated or resolved. The purpose of this agreement is to specify the local and state involvement in funding the project. A signed agreement is required before the State will prepare or participate in the preparation of detailed designs, acquire right-of-way, or participate in construction of a project that merits local involvement.



Wauwatosa, WI

7725 W. North Avenue
Wauwatosa, WI 53213

Staff Report

File #: 24-0530

Agenda Date: 4/9/2024

Agenda #: 2.

Recommendation for approval of a term sheet with Wingspan Development Group for a multifamily housing development, the Foundry, at the Mayfair Collection (11220 W. Burleigh Street) and approval of associated contracts with Mannedge Consulting and Prism Technical

Submitted by:

Economic Development Team

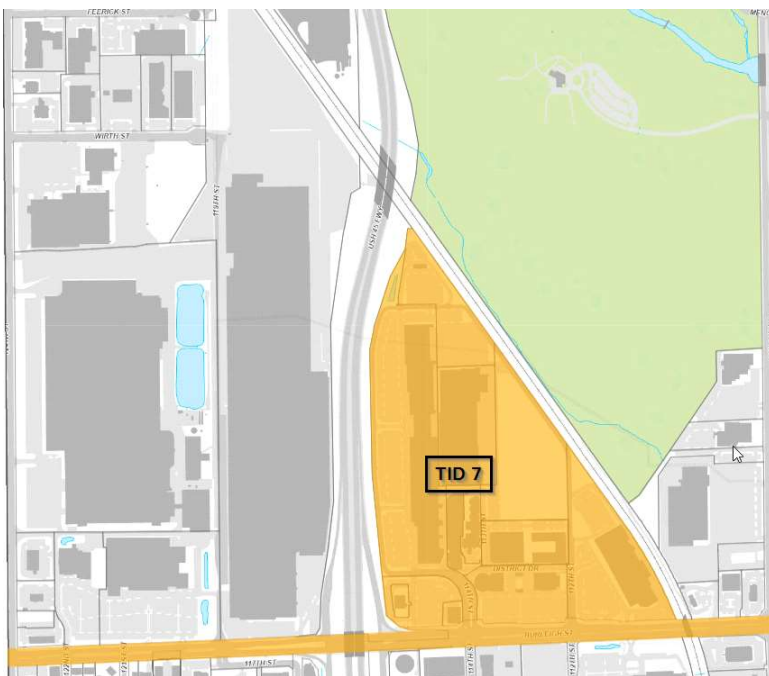
Department:

Development, City Attorney, Finance

A. Issue

Wingspan Development Group has requested Tax Increment Financing support for a multifamily residential building to be located at 11220 W. Burleigh Street behind the current Synergy apartment complex. The Economic Development Team and a third-party financial consultant from Baker Tilly have determined that the project is not likely to proceed without financial assistance and is recommending the terms that will be discussed in closed session.

B. Background/Options



Tax Incremental District Overview

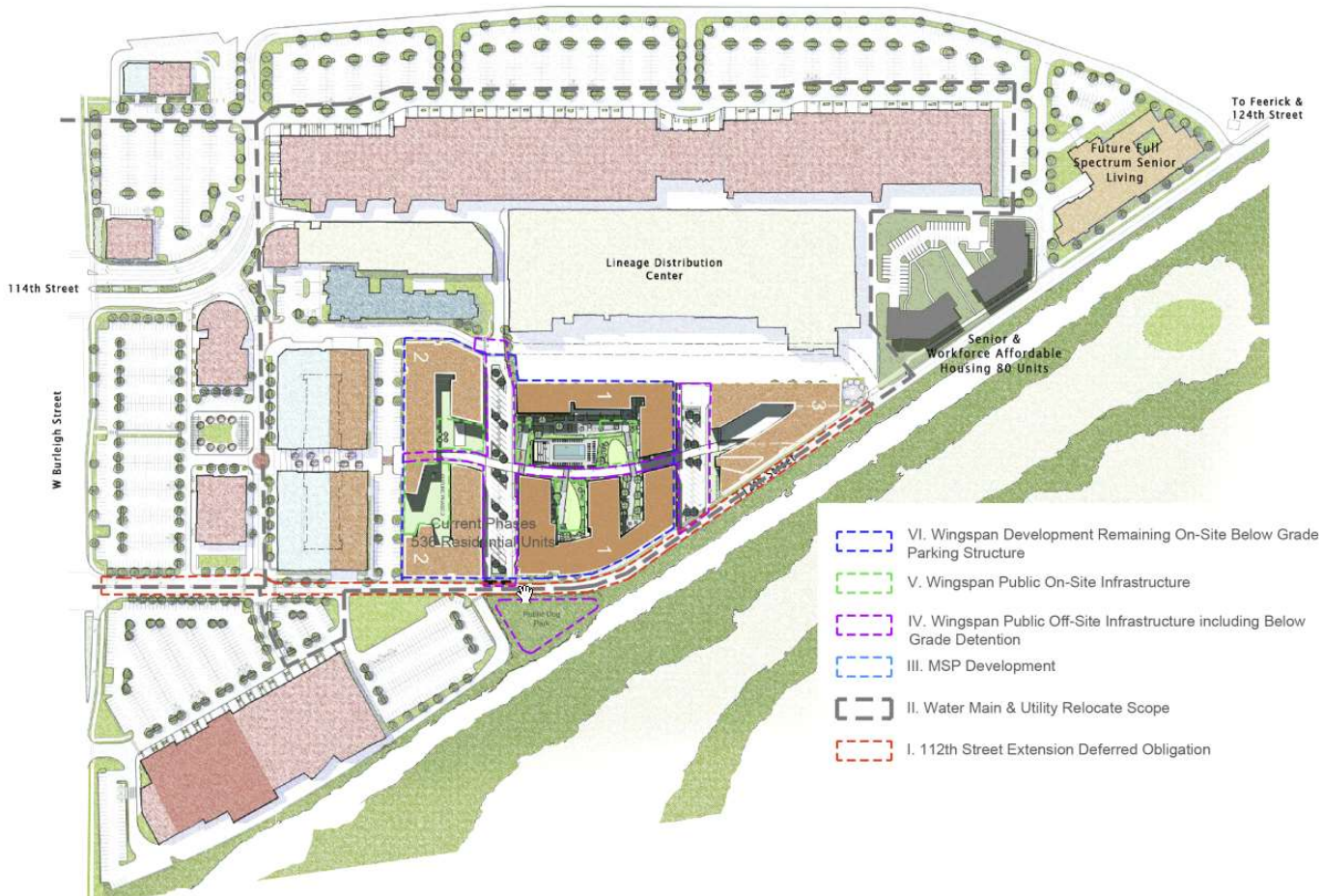
This 67-acre district was created in November 2012 to facilitate the redevelopment of the Burleigh Triangle area within the City. The first phase of development is located on the western-most 23-acre parcel and adaptively re-used existing warehouse space to create a 275,000 square foot regional specialty retail center known as Mayfair Collection.

The Common Council approved a term sheet for phase 2 of the project on October 6, 2015 which resulted in additional retail, a grocery store, a hotel, four restaurants, and a parking structure to support phases one and two. A third phase will include additional retail as well as more than 1,000 apartments. Terms for the first 260 apartments and 50,000 sq. ft. of retail were approved on August 2, 2016. Demolition of the Schoenick warehouse took place in 2020-2021 as well as the completion of internal roadways and utilities. The City is currently in negotiations for the acquisition of the necessary private property to complete a roadway under the interstate at the northern tip of the district. In addition, an 80 unit affordable housing building broke ground in 2023.

As of January 1, 2023, the incremental value of the district was \$194,987,000. The fund balance as of 12/31/23 is estimated to be negative \$493,849 but is projected to grow positive in 2-3 years.

Project Overview

The City of Wauwatosa received a request for financial assistance through Tax Incremental Financing (TIF) to assist with financing a portion of the eligible costs related to the construction of an approximate 523-unit 2 building multi-family housing project with underground parking known as the Foundry. This project has received approval as a Planned Unit Development and the map below shows the project layout within the Mayfair Collection (buildings 1 and 2).



As shown in the map above, this is intended to be a two-building project that will share a single underground parking structure and be completed and financed as one project with construction occurring separately for each building. The first building will include 289 residential units, and the second building an additional 234 units. Construction of the second building is proposed to begin immediately following completion of the first building. In total the development is proposed to contain 523 total market rate residential units. Construction of the proposed development is expected to begin in the summer of 2024 and continue until completion of the second building in 2026. The first building is proposed to have occupancy beginning in 2025, and full occupancy of both buildings is expected to occur in 2027.

Tax Incremental Financing Request and District Financial Projections

The Developer has requested financing of the underground parking structure through a pay-as-you-go Municipal Revenue Obligation. The Developer has requested that Wingspan be reimbursed for constructing off-site public infrastructure including a public pedestrian path, dog park, cross streets that integrate with the overall grid and below grade storm water vaults. The details of these requests will be covered in closed session as part of the negotiation process.

It should be noted that property increment generated by this project was assumed to help fund the 56 affordable apartments being constructed as part of the 80-unit MSP project to the north. In addition,

a payment will be made by the Developer to the Community Development Authority's affordable housing fund, with a credit provided for the 56 units described above, in lieu of providing affordable units in this project.

We have determined that the projected property tax increment, along with existing increment, will be sufficient to fund the Municipal Revenue Obligation and maintain a 1.25 coverage ratio for the borrowed funds required for the reimbursements as well as existing District debt.

If these were the final obligations incurred by this District, it could close in 2033 with \$294 million of projected incremental property value. However, the City still has additional development opportunities as contemplated by the District Project Plan which also includes using increment to construct an underpass to provide a northern connection to Feerick or Wirth Streets as well as a pedestrian and bike overpass into Curry Park east of the railroad tracks.

Professional Service Contracts

The Developer will agree to having the project inspected by a third-party owner's representative as well as complying with the City's Procurement Equity policy in hiring 25% Disadvantaged Businesses and employing 25% of new workers from designated zip codes in Milwaukee County.

The City proposes utilizing Mannedge as the owner's representative. This will require an amendment to the competitively bid 2015 contract (attached) although Mannedge has agreed to continue to hold their 2015 pricing on a per monthly report basis. The total estimated cost is \$32,600 assuming a 36-month construction timeline.

The City proposes continuing to utilize Prism Technical for project inclusion monitoring and support. Their proposal is for a not-to-exceed amount of \$111,465 for the first building. This service was competitively bid in 2022. Both costs are included in the Tax Increment District assumed expenses.

C. Strategic Plan (Area of Focus)

Economic Development & Financial Resilience

D. Fiscal Impact

Details of the financial liabilities for the City will be discussed in closed session. We project that the district will have sufficient revenues to cover these liabilities so there is no anticipated impact on the general fund or the property tax rate.

E. Recommendation

Depending on the direction given in closed session, we recommend approval of a Term Sheet with Wingspan Development, approval of a contract amendment with Mannedge Consulting and a new contract with Prism Technical.

The Committee may convene into closed session regarding this item pursuant to Wis. Stat. §19.85 (1)(e), to deliberate or negotiate the purchasing of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session. The Committee may reconvene into open session to consider the balance of the agenda.



December 29, 2014

City of Wauwatosa
Purchasing Department
7725 W. North Avenue
Wauwatosa, WI 53213

RE: Echelon Residential Apartment Development
Proposal for Third Party Peer Review and Inspection

Thank you for the opportunity to submit my proposal to work with the City of Wauwatosa on the Echelon Development. I believe I am uniquely qualified for the work as described in your Request for Proposal.

- I have 39 years of construction experience.
- I worked for the Village of Whitefish Bay on a very similar project called Beaumont Place. The Village owns the public parking in the complex and had Mannedge work with the developer during the design of the plans and specifications to insure the building was being designed and later built to the highest standards. During the construction I performed the peer review and inspections of the parking structure portion of the project.
- A significant part of my business is reviewing draw requests for financial institutions. Currently I am reviewing over \$50 million dollars and over 500 apartment units in and around the greater Milwaukee area.
- As a sole proprietor when you hire Mannedge, your hire John Mann and all of my experience.

I look forward to working with your team on this project.

Respectfully submitted,
MANNEDGE CONSULTING, LLC

A handwritten signature in black ink, appearing to read "John D. Mann", is written over the typed name.

JOHN D. MANN

Request for Proposals

Architectural / Engineering Services

Third Party Peer Review and Inspection For:

Echelon Residential Apartment Development

December 29, 2014

Description of Firm:

- Mannedge Consulting, LLC is an owner's representative consulting firm started in 2006.
- John Mann is the sole proprietor of the firm. There are no other employees.
- The office address is:
 - 2606 West Lake Park Court
 - Mequon, WI 53092
 - 262-643-4041
 - john@mannedge.com
- John Mann will answer all questions.

Project Approach:

- Mannedge Consulting will complete a review of the contract documents to make sure that Wauwatosa's interests are met. On other projects I have attended design meetings when the parking structure was being discussed.
 - The review will specifically look for the design to meet long term construction standards.
 - A review of the estimates to make sure they are within the norms of other projects being built in the area.
- A great deal of the project as described will be on an "on call" basis.
 - Each month when the draw request is ready I will inspect the project for compliance with the request of funds and the anticipated schedule. This inspection and report is typically completed within 2-5 days of the request.
 - I am available for other duties as requested by Wauwatosa.

Experience of the Staff: (A resume is attached. Bullet points below.)

- John Mann is a graduate of the University of Wisconsin – Milwaukee School of Architecture.
- John Mann worked for the Jansen Construction companies from 1975 to 2006 as an estimator, project manager and eventually the Chief Operating Officer.
- In 2006 John Mann started Mannedge Consulting as an owner's representative consulting company. A part of that consulting has included third party draw request bank inspections.
 - Representative clients on the owner's representative side have included:
 - U.S. Bank downtown Milwaukee parking structure
 - Village of Bayside communication center.
 - Village of Whitefish Bay DPW building.
 - Town of Delafield new fire department and town hall building.
 - Representative clients on the bank inspections include:
 - Johnson Bank
 - Town Bank
 - Anchor Bank
 - First Business Bank
 - Pyramax Bank
 - Village of Whitefish Bay, Beaumont Place

Similar Work: (See attachment)

- The most relevant project that is similar to this project is the Beaumont Place project in Whitefish Bay. This project is very similar to Echelon in many ways. The project is being developed by Mandel. A piece of the parking structure is being owned by the Village. On this project I participated in design meetings with the architect and Mandel representing the Village to make sure the parking structure was being designed to standards that met the Village's expectations. During the construction I reviewed the construction draws of the parking structure portion of the project. I did not review requests during the construction of the apartments.
- Since opening the consulting business I have worked for Bayside, Whitefish Bay, Delafield and the North Shore Fire Department as an owner's representative.
- My third party inspection current work load is as follows:
 - 199 apartments, 18.5 million in Waukesha.
 - 144 apartments, 15.3 million in Menomonee Falls.
 - 88 apartments, 8.7 million in Pleasant Prairie.
 - 75 apartments, 8.3 million in New Berlin.

Coinciding Wauwatosa Projects: - None

Fee Schedule:

- Preconstruction Review: - \$2,500
- Draw request inspection fee: - \$850/request including a written report.
 - 17 inspections x \$850 = \$14,450.
- Construction Savings Report: - This is impossible to estimate. Depending on what is provided by the developer it could be as little as \$1,000. If major research and auditing the books of the contractor and developer are needed, the cost could skyrocket. I suggest we leave this out of the agreement until we better understand the work necessary.
- Water main pay applications: - \$500/request including a written report.
- Miscellaneous meetings: - \$225/hour.
- Reimbursables: None anticipated.

References:

- Village of Whitefish Bay
 - Steve Sheiffer – S.Sheiffer@wfbvillage.org
- Village of Bayside
 - Andy Pederson – apederson@bayside-wi.gov
- Mandel Group
 - Bob Monnat – rbmonnat@mandelgroup.com
- Town Bank
 - John Johannes – jjohannes@townbank.us

John D. Mann

Owner's Representative

Education:

Bachelor of Architecture,
University of Wisconsin-Milwaukee

Years Experience:

39 years

8 years Mannedge Consulting

31 years Jansen Construction
Estimator, project manager, chief
operating officer

John Mann is the president of Mannedge Consulting.

Mannedge has two distinct focuses. The first is a service to banks and municipalities providing draw request inspections. Inspections have ranged from apartments, hotels, industrial and commercial work. Typical services include monthly pay request inspections but have also included weekly visits to projects where the lending institution is concerned about a project where more inspections are required.

The second focus is that of an owner's representative. John is a highly skilled owner's representative who has successfully managed projects to ensure that they are completed on time and on budget. An example of this is the US Bank parking structure which was closed in the summer of 2010 and had a goal of opening in time for Summerfest the following summer. Under John's supervision, the certificate of occupancy was issued two days before Summerfest began. Also, every institutional project with which John has been associated with during his three decades in the business has opened on time and on budget.

John brings a diverse background of building types:

- US Bank Parking Deck Replacement – 7 level downtown parking deck, \$16,000,000
- TCI – 66,000 s.f. industrial building, Germantown
- Gauthier Biomedical – 80,000 s.f. industrial building, Grafton
- Village of Whitefish Bay – 41,000 s.f. DPW building.
- Village of Bayside Communication Center
- Gray & Associates – 160 person law firm building rehab, \$3,000,000
- 5600 N. Lake Drive – Mixed-use development with luxury condominiums over bank retail space.
- 1522 On The Lake – Nineteen story 95 two and three bedroom units and penthouse luxury condominium
- Forest Ridge Housing – 112 unit senior housing project.
- Veterans Administration Regional Office – 102,747 s.f. 3 story office building, \$11,000,000
- Strong Capital Management Corp. – 174,000 s.f. world-class office and parking structure built in 10 months, \$25,000,000
- Stark Investments – 60,000 s.f. remodel of an existing office building for a state-of-the-art hedge fund office and data center
- Whitefish Bay Schools – Cumberland, Richards, and the High School remodeling completed over two years. The Middle School was another project completed under separate contract.
- Pewaukee School District – Project 1: 78,365 s.f. stand-alone new elementary school grades 4-6. Project 2: 21,268 s.f. high school science addition
- Milwaukee School of Engineering: - 5 story apartment style dormitory addition
- Fiserv – 120,000 s.f. three story brick veneer corporate headquarters in Brookfield



Village of Whitefish Bay
5300 North Marlborough Blvd.
Whitefish Bay, WI 53217

Draw Request Review
Beaumont Place LLC
Village of Whitefish Bay

Job Site Visit: June 23, 2014

On Grade Parking

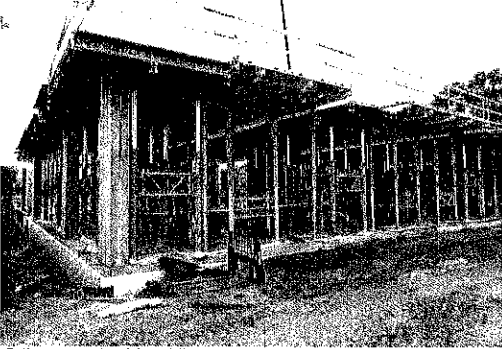
General Information:

Contractor: VJS Construction Services
Greenfire Management Services

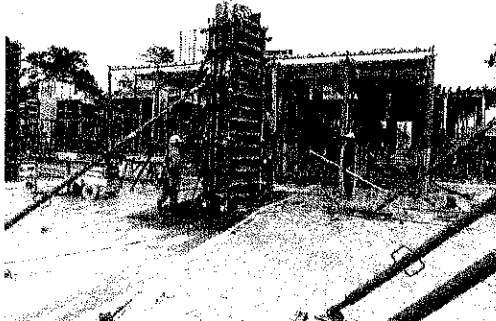
Total Contract Amount	\$	1,620,000.00
Total Earned to Date	\$	311,985.18
Application #1 5/31/14	\$	280,786.66
Approved:	\$	280,786.66
Balance to finish.	\$	1,339,213.34
Percent Complete		19%
Sufficient funds to complete:		



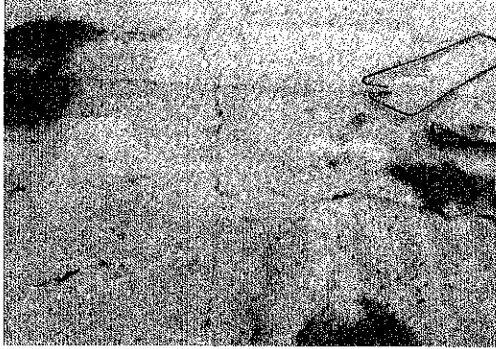
Looking towards the SE



SE corner looking NW



Looking towards the NE



Slab surface cracks

1. Basement foundations and grade level slab are completed.
2. First floor columns and second floor deck are being formed.
3. There is some surface cracking that should be reviewed by the architect and engineer for long term durability.
4. I have reviewed the request prepared by VJS for Division 3 Concrete. The amount being drawn is approved.
5. The total amount of the draw is per formula with the Village.

John D. Mann
MannEdge Consulting, LLC



Village of Whitefish Bay
5300 North Marlborough Blvd.
Whitefish Bay, WI 53217

Draw Request Review
Beaumont Place LLC
Village of Whitefish Bay

Job Site Visit: July 30, 2014

On Grade Parking

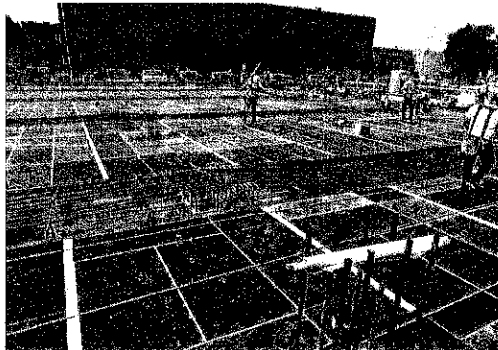
General Information:

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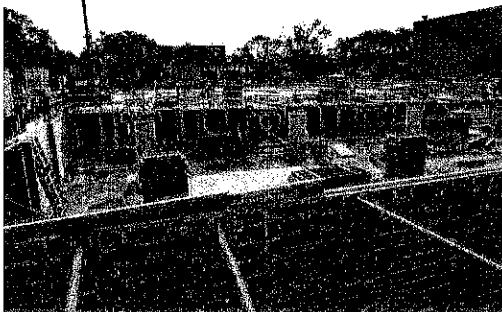
Total Contract Amount	\$	1,620,000.00
Total Earned to Date	\$	583,118.59
Application #2 6/30/14	\$	302,331.93
Approved:	\$	302,331.93
Balance to finish.	\$	1,036,881.41
Percent Complete		36%
Sufficient funds to complete:		



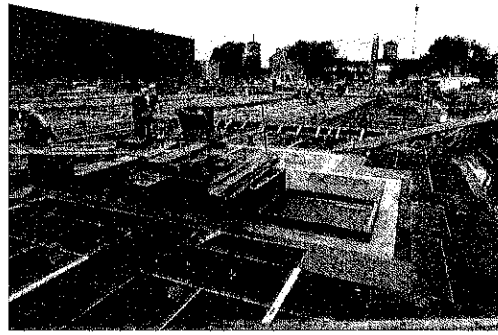
Building C - being prepared for sealer.



Building B - Setting reinforcing



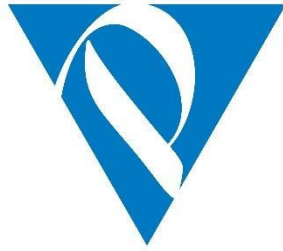
Building B - looking east



Building B - looking west

1. Building C structural concrete work is substantially completed.
2. Building B - on grade deck is formed and reinforcing is going in.
3. Good progress was made in the last 30 days.
4. I have reviewed the request prepared by VJS for Division 3 Concrete. The amount being drawn is approved.
5. The total amount of the draw is per formula with the Village.

John D. Mann
MannEdge Consulting, LLC



WAUWATOSA Proposal



WINGSPAN

DEVELOPMENT GROUP

- Foundry Apartments

Project Inclusion Monitoring



March 12, 2024

Mr. John Ruggini, Finance Director

City of Wauwatosa

7725 West North Ave

Wauwatosa WI 53213

Subject: Proposal Response for Inclusion Plan and Monitoring Services

Reference: **Wingspan Development / Foundry Apartments @ the Mayfair Collection**

John:

Thank you for the opportunity to submit a proposal to provide Inclusion and monitoring services for the referenced project.

PROJECT UNDERSTANDING

1. Developer/Wingspan Development Group – located in the Metropolitan Chicago area is seeking to build a single residential apartment development project in two phases, Phase I will consist of 289 units while Phase II is projected to be 234 units for a total of 523 residential units. The project will have a courtyard and onsite below-grade structured parking.
2. Construction is scheduled to begin in June 2024 with Phase I lasting two years. While Phase II is intended to start before Phase I is completed, it is not a part of this proposal but may be added as a Change Order or new contract later.
3. This project is a market rate development without WHEDA funding and therefore does not have additional inclusion goals or requirements.
4. We anticipate a need to work closely with the out of out-of-state developer to help them understand the Wauwatosa Inclusion program and to assist them in connecting with local contractors' trade labor sources, including DBE certified firms and construction trades training agencies.

ABOUT THIS PROPOSAL

- A. This proposal is an offer to provide consulting services to Wauwatosa to Monitor the business and Targeted new hire workforce in compliance with the Tosa plan and to assist the Wingspan Development Group , along with its selected General Contactor and other trade partners with meeting qualified and competitive Targeted businesses and sources for finding trained workers. As a result, we have specifically included both a workforce and business outreach event for the project, to be held in an appropriate location in Wauwatosa or in our MLK Drive office/Community Space to reduce the cost to all involved, if necessary.
- B. We will make minor modifications to a previous Project Inclusion Plan, to align with the terms of the Wingspan Development Group / Wauwatosa development agreement as necessary, but we do not anticipate making any changes to the structure of the LCPtracker software platform developed to your designated workforce inclusion program. When and if Phase II begins, we will need to add cost to extend our software agreement to cover the added work.
- C. While Prism will provide direction as requested, the Development, its contractors, and vendors are solely responsible for achieving the Wauwatosa inclusion program goals.
- D. Prism will collect contract and payment data monthly via email from the development team and its contractors, while workforce data will be collected via LCPtracker.
- E. Because this is a new Developer to Tosa and possibly Wisconsin, we have not submitted a proposal to include onsite interviews of the Trade workforce or DBE firms in the cost for this two-year project. We would like to confirm that the City of Tosa wants this effort and is willing to have the first conversations about the matter with the developer. We suggest one to two interviews of trade workers per quarter to avoid fears of the process being intrusive to worker productivity. We would also like to come to an understanding with all parties why the interviews are conducted, prior to the start of the project, and to develop a simple process for its execution.

PARTICIPATION PROGRAM

BUSINESS INCLUSION GOALS

- **Professional Services expenditures:** 18% with Certified Disadvantaged Business Enterprises (DBE). Certification must come from a Wisconsin governmental entity. Firms certified by other States under the USDOT Unified Certification Program should apply for Wisconsin DBE status. It is typically reciprocal, free, and quick.
- **Construction Service expenditures:** 25% with Certified Disadvantaged Business Enterprises (DBE). Certification must come from a Wisconsin governmental entity. Firms certified by other States under the USDOT Unified Certification Program should apply for Wisconsin DBE status. It is typically reciprocal, free, and quick.

WORKFORCE INCLUSION

- **Wauwatosa:** 25% of all newly hired worker hours will be completed by workers from Distressed Zip Codes within Milwaukee County or as otherwise defined by the City of Wauwatosa. This allows workers from low-income Milwaukee County families to qualify, regardless of the person's actual residential zip code.

SCOPE OF SERVICES & DELIVERABLES

1. Prism will make minor modifications to the Project Inclusion Plan, authorized by the City of Wauwatosa, to clarify language to aid in contractor compliance working with the Developer.
2. If requested, Prism will host a DBE service provider Meet and Greet for contractors and professional service firms to facilitate building relationships. Such meetings may be in person or virtually, with the sole purpose of introducing the Developer and/or any previously chosen partners –CM, GC, or Prime Trade Contractors to introduce local contractors to the Wingspan team.
3. Prism plans to connect the development team and its contractors with agencies that provide construction training and skilled labor such as W RTP/BIGSTEP, Employ Milwaukee, the Social Development Commission (SDC), and other local trade worker training and service providers.
4. Prism will need up to three months to close out the project upon substantial completion to confirm contractor closeouts and write the final inclusion report.

METHODOLOGY

- Meet with the Wingspan Development team to begin crafting any edits to the Project Inclusion Plan (PIP), as approved by the City of Tosa.
- Obtain the project schedule containing key project milestones.
- Create a modified PIP.
- Deploy LCPtracker to appropriately track worker hours from Distressed Zip codes or income-eligible workers regardless of zip codes.
- Prism to track contractor payments via email with the D-GC.
- Alert local training agencies of the major project milestones and the need for workers.

NOT TO EXCEED FEE

Inclusion Program Development and Monitoring Fee..... \$95,467 net all

Estimated Cost for modified LCPtracker Application (2 years)*----- \$15,998

Total not to exceed cost \$111,465 Net all

*LCPtracker is quoted without markup. The 2024 Annual fee for projects of \$50M - \$100M is \$7,999.

There is no additional setup cost as the current Wauwatosa database structure would be utilized.

Sincerely,

Prism Technical



Randy Crump

CEO

FOUNDRY

Mayfair Collection - Wauwatosa

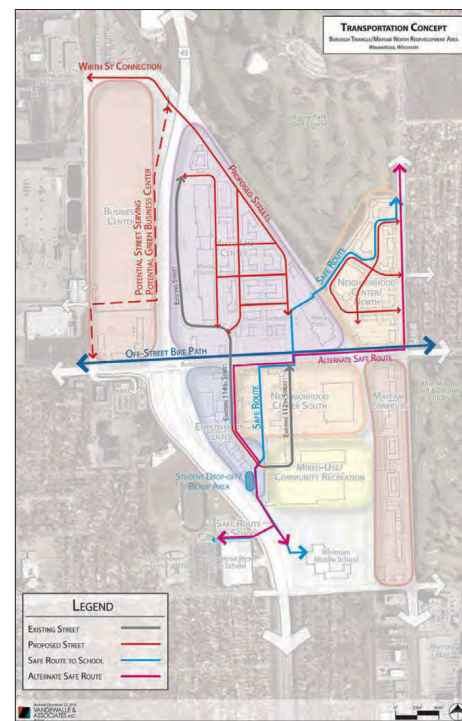
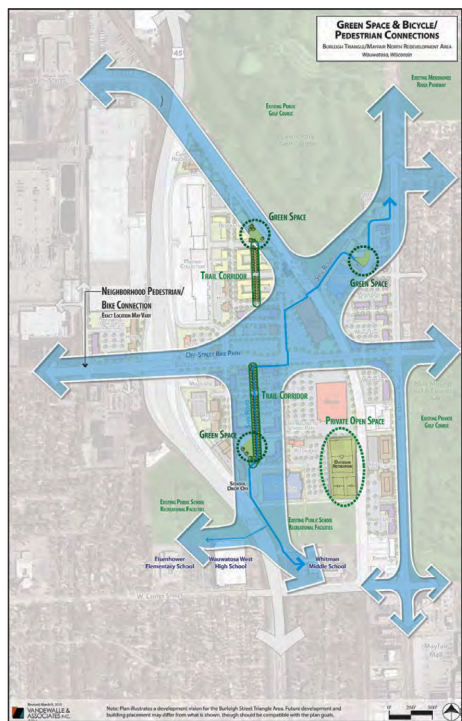
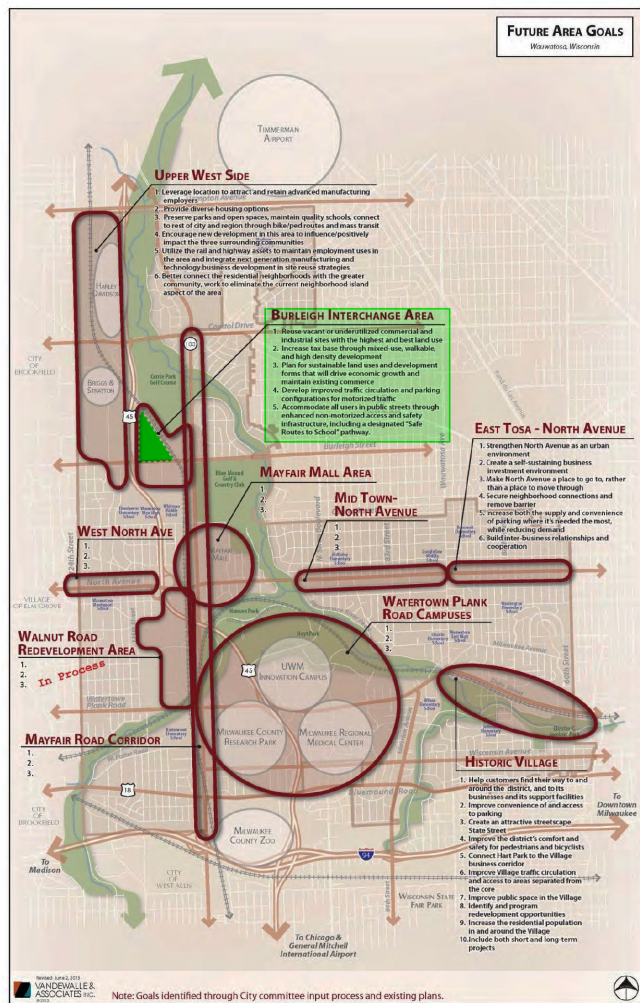
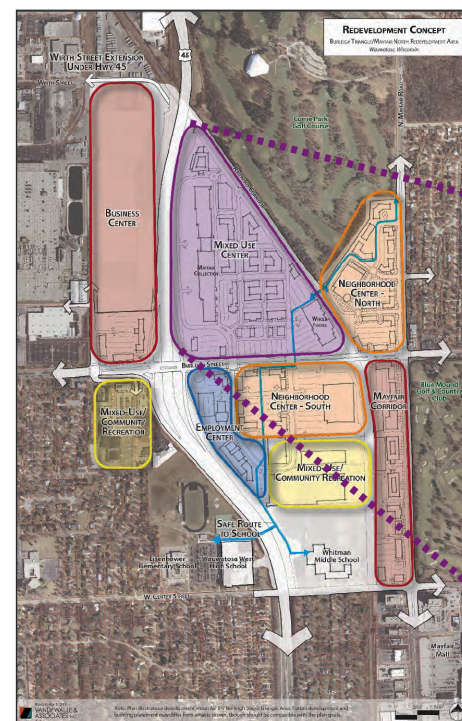
Financial Affairs Committee

April 9, 2024

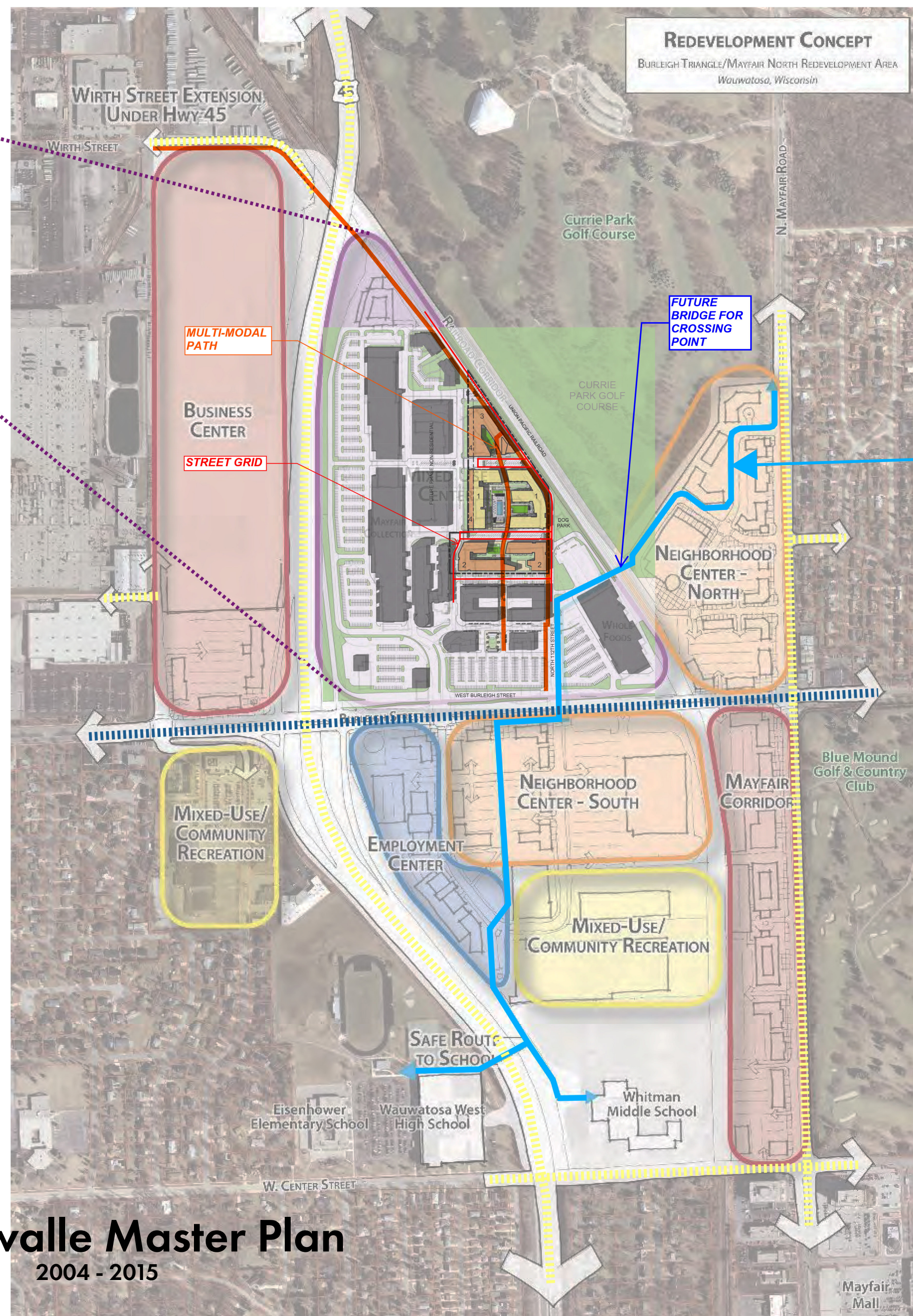





Burleigh Triangle 2007

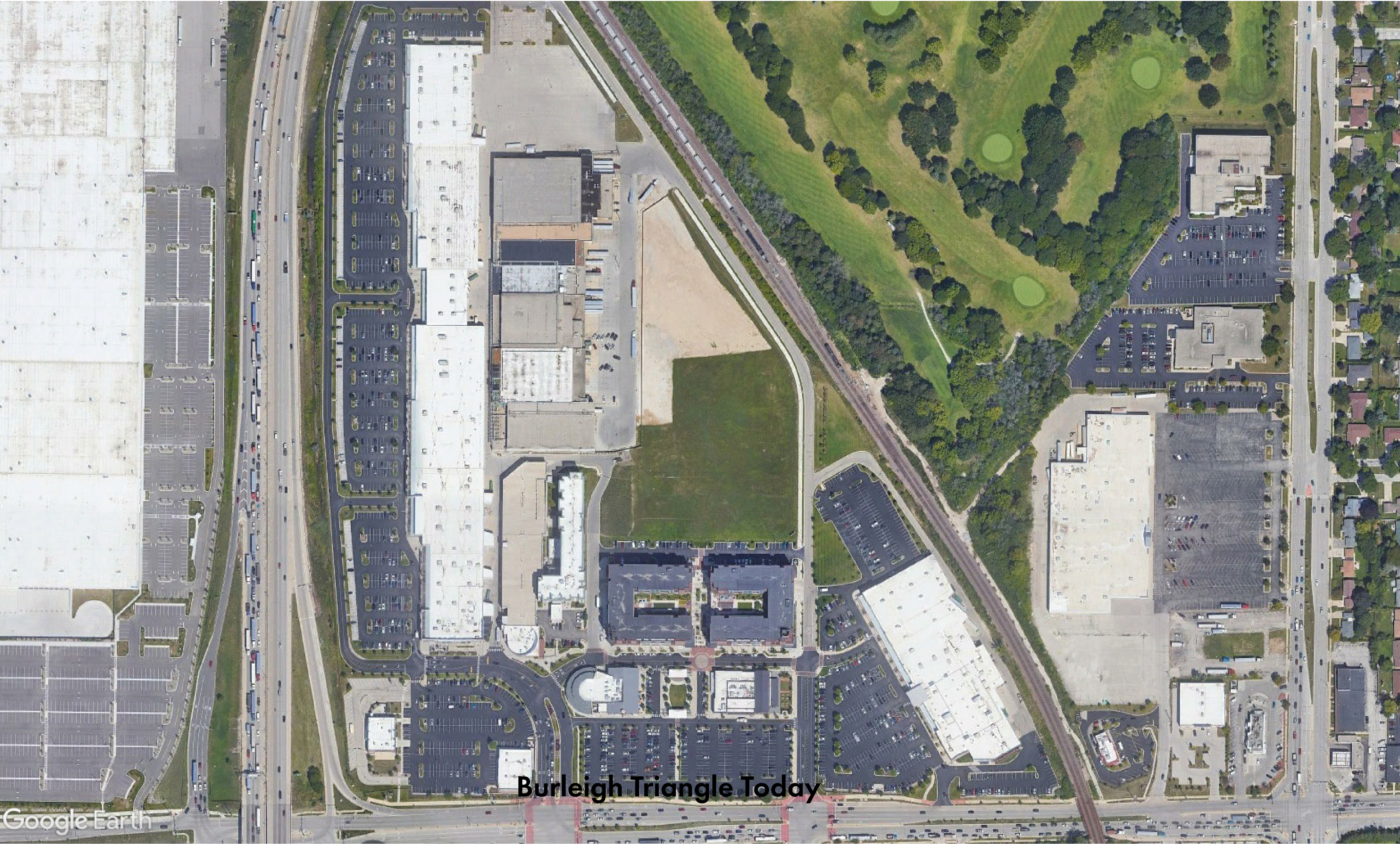


Redevelopment Vision
Budget Street Corridor: A gateway corridor and major entryway into the heart of Wauwatosa - a vibrant and connected business district which is a destination in its own right, maximizing its high-value market location, offering employment opportunities, amenities, and attractions that complement community character and meet the needs of residents in the adjacent walkable neighborhoods, as well as offer unique experiences for the broader community and visitors.

The logo for Wisconsin Safe Routes to School. It features the word "WISCONSIN" in a black, sans-serif font at the top. Below it, the words "Safe Routes" are written in a large, blue, cursive-style font. At the bottom, the words "TO SCHOOL" are written in a black, sans-serif font. To the right of the text is a black silhouette of a school building with a flag on top. A blue wavy line starts from the bottom left, loops around the school building, and ends at the bottom right.

Vandewalle Master Plan

2004 - 2015

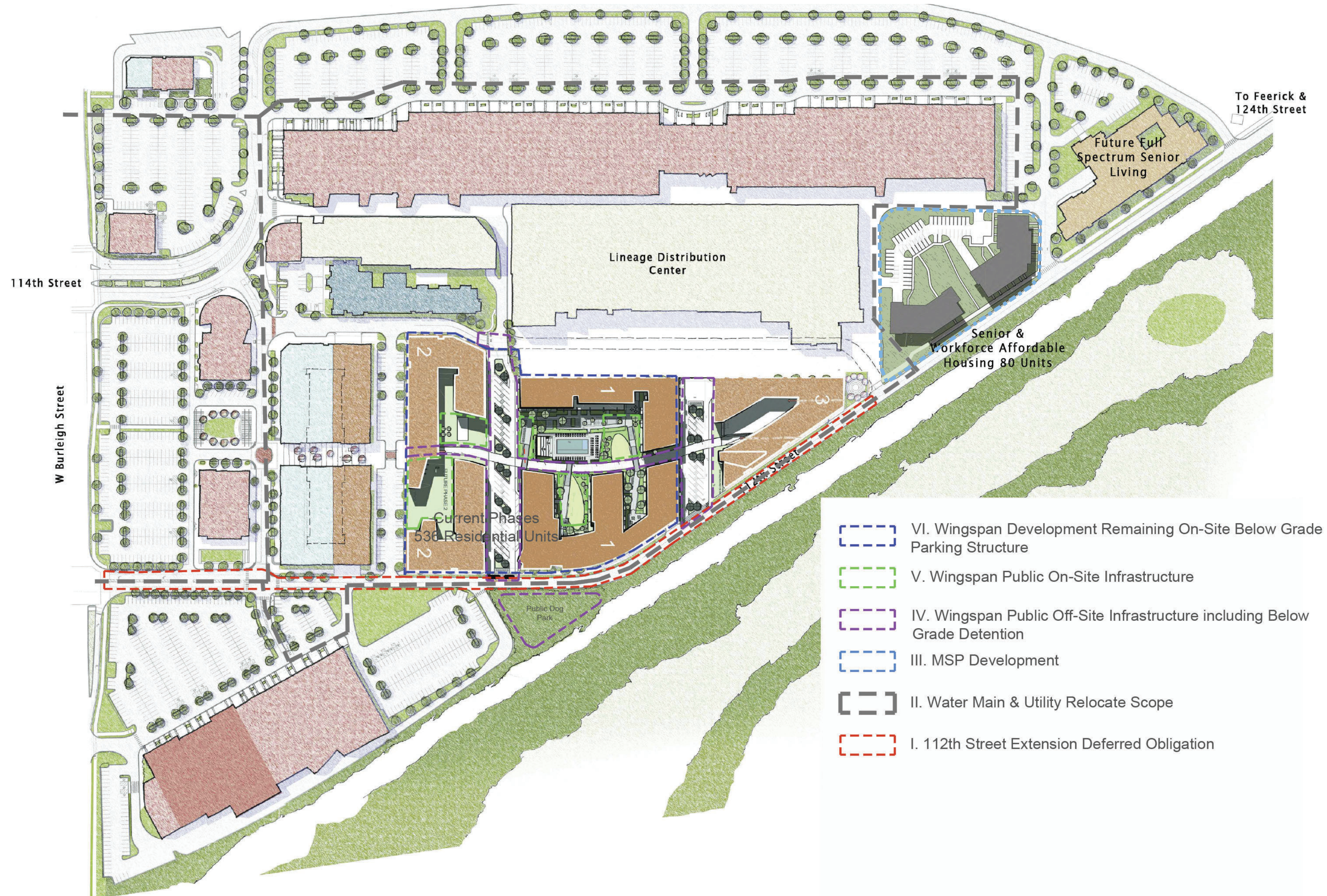


Burleigh Triangle Today

Google Earth



THE MAYFAIR COLLECTION
WAUWATOSA, WISCONSIN



FOUNDRY AT MAYFAIR
COLLECTION

11220 BURLINGHAM ST.
WAUWATOSA, WI 53222
WINGSPAN DEVELOPMENT GROUP
1001 Feetharville Drive - Mount Prospect, IL 60056
CITADEL PROPERTY ADVISORS
100 South Wacker Drive, Suite 950 - Chicago, Illinois 60606

PROJECT NUMBER 223467.00

ISSUED FOR:
FINAL PUD 12/7/2022
REVISION FOR:
NO. DESCRIPTION DATE

NOT FOR CONSTRUCTION

DRAWN BY Author
CHECKED BY Checker

OVERALL BASEMENT PLAN

A100.1



PARKING	
PHASE I - TOTAL 289 UNITS	
B1 - 55 UNITS	
B2 - 194 UNITS	
PHASE II - TOTAL 234 UNITS	
B3 - 100 UNITS	
B4 - 134 UNITS	
TOTAL UNIT PHASE I & II - 523 UNITS	
PARKING RATIO 1:1.3	
REQ. PARKING 680 STALLS	
BASEMENT PARKING - 672 TOTAL (2 TANDEMS)	
2% ADA PARKING - 14 STALLS REQ. 15 STALLS PROVIDED	
SURFACE PARKING - 50 TOTAL	
4 ADA PARKING	
TOTAL PARKING 731 TOTAL	
PARKING RATIO 1:1.35	

BICYCLE PARKING	
BICYCLE PARKING CALCULATION	
B1 - 95 UNITS	
LONG TERM SPACES (14 UNITS)	24
SHORT TERM SPACES (1.5 UNITS)	19
B2 - 194 UNITS	
LONG TERM SPACES (14 UNITS)	49
SHORT TERM SPACES (1.5 UNITS)	39
BICYCLE PARKING REQ./PROV	
B1 - LONG TERM SPACES 24/24	
BIKE ROOM - BASEMENT	
7 units - Offset 5' VRT - Vertical Bike Parking Racks / for 14 bicycles	
1 unit - One Side 10' - BK1002 - 5 rails / for 10 bicycles	
B2 - LONG TERM SPACES 49/50	
BIKE ROOM - BASEMENT	
10 units - Offset 5' VRT - Vertical Bike Parking Racks / for 22 bicycles	
1 unit - One Side 10' - BK1002 - 5 rails / for 10 bicycles	
1 unit - Dual Side 20' - BK2002 - 10 rails / for 20 bicycles	
B1 & B2 - SHORT TERM SPACES 58/58	
outside at RESIDENTIAL LOBBY & COURTYARD	
29 unit - LOOP BIKE RACK from LANDSCAPE FORMS (for 58 bikes)	
B1 + B2 - SHORT TERM SPACES 58/58	

B1 - FLOOR AREA SUMMARY	
FLOOR	TOTAL SF
BASEMENT (PHASE I & II)	245,596 SF
LEVEL 1	28,585 SF
LEVEL 2	25,955 SF
LEVEL 3	25,955 SF
LEVEL 4	25,955 SF
LEVEL 5	25,955 SF
TOTAL B1 (NO BASEMENT INCLUDED)	132,405 SF

UNIT SIZES SUMMARY	
UNIT TYPE	PROVIDED SIZE
STUDIO	489 SF
ONE BEDROOM	680 - 935 SF
TWO BEDROOM	990 - 1,120 SF
THREE BEDROOM	1,279 - 1,426 SF

B1 - UNIT MATRIX						
UNIT TYPE	UNITS PER FLOOR					TOTALS
	1ST	2ND	3RD	4TH	5TH	
STUDIO	1	1	1	1	1	5 (5%)
ONE BEDROOM	3	7	7	7	7	31 (33%)
TWO BEDROOM	7	12	12	12	12	55 (58%)
THREE BEDROOM	-	1	1	1	1	4 (4%)
UNITS / FLOOR	11	21	21	21	21	95

B2 - FLOOR AREA SUMMARY	
FLOOR	TOTAL SF
BASEMENT (PHASE I & II)	245,596 SF
LEVEL 1	42,350 SF
LEVEL 2	42,350 SF
LEVEL 3	42,350 SF
LEVEL 4	42,350 SF
LEVEL 5	42,350 SF
TOTAL B2 (NO BASEMENT INCLUDED)	277,750 SF

UNIT SIZES SUMMARY	
UNIT TYPE	PROVIDED SIZE
STUDIO	480 SF
ONE BEDROOM	560 - 690 SF
TWO BEDROOM	990 - 1,240 SF
THREE BEDROOM	1,279 - 1,426 SF

B2 - UNIT MATRIX						
UNIT TYPE	UNITS PER FLOOR					TOTALS
	1ST	2ND	3RD	4TH	5TH	
STUDIO	2	2	2	2	2	10 (5%)
ONE BEDROOM	18	22	24	24	24	112 (58%)
TWO BEDROOM	12	13	13	13	13	64 (33%)
THREE BEDROOM	1	1	2	2	2	8 (4%)
UNITS / FLOOR	33	38	41	41	41	194













Thank You

