



# Wauwatosa, WI

## Financial Affairs Committee

### Meeting Agenda - Final

7725 W. North Avenue  
Wauwatosa, WI 53213

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Tuesday, December 3, 2024

7:15 PM

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

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#### 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. Final report on construction and workforce equity results on the MSP Burleigh apartment project [24-1516](#)
2. Request by the Assessor's office to waive the competitive bidding process, transfer funds and enter into a contract for expert assistance in the valuation of complex property up to \$60,000 [24-1519](#)

*The Committee may move to convene into closed session for this item pursuant to Wis. Stat. §19.85 (1)(g) for the purpose of conferring with legal counsel for the governmental body who is rendering oral or written advice concerning strategy to be adopted by the body with respect to litigation in which it is or is likely to become involved. 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](mailto:tclerk@wauwatosa.net), with as much advance notice as possible.



# Wauwatosa, WI

7725 W. North Avenue  
Wauwatosa, WI 53213

## Staff Report

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**File #:** 24-1516

**Agenda Date:** 12/3/2024

**Agenda #:** 1.

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Final report on construction and workforce equity results on the MSP Burleigh apartment project

**Submitted by:**

John Ruggini

**Department:**

Finance Department

**A. Issue**

The Procurement Equity Policy requires Tax Increment Financing projects include required Disadvantaged Business Enterprise (DBE) and Distressed Zip Code hiring inclusion. The final results are available for the MSP-Burleigh Triangle multifamily development.

**B. Background/Options**

The City of Wauwatosa provided financial assistance through Tax Increment Financing (TIF) to assist with financing a portion of the eligible costs related to the construction of an approximate 80-unit mixed income affordable housing project at the Mayfair Collection at 11500 West Burleigh Street developed by MSP. Construction has concluded on the 2 buildings that are dedicated for both families and seniors within each respective building. The income levels of the units are a mix of 30%, 50%, 60% and market rate levels.

The Developer was required to hire or sub-contract with firms registered as Disadvantaged Business Enterprises with Milwaukee County or the State of Wisconsin Department of Transportation to complete 25% of the construction and professional services work. In addition, the developer was required to set a goal of hiring 25% of their additional construction work force from distressed zip codes within Milwaukee County. This is a requirement of the City's Procurement Equity policy.

Prism Technical was hired to monitor and support the achievement of these goals. The final report is attached. In summary:

"It is notable that this is the second MSP project under the relatively new Wauwatosa inclusion program, indicating that familiarity and planning is the key to success. The development team exceeded both the workforce and business inclusion goals of 25% target worker hours; as well as 25% of the hard cost coming from Emerging Business Enterprises - achieving 41.9% Target Worker hours and 46.5% EBE Participation by the completion of the project. Though Wauwatosa inclusion program has EBE goals, the development team achieved 30.7% DBE Participation."

Also included in the report are interviews with a DBE contractor and a worker from a targeted zip code to

show the real-life positive impacts of the program.

The Prism Technical Team will be available to present the report.

**C. Strategic Plan (Area of Focus)**

For informational purposes only

**D. Fiscal Impact**

For informational purposes only

**E. Recommendation**

For informational purposes only

# MSP Mayfair Apartment

## Final Inclusion Participation Report



MSP Mayfair Apts.



## EXECUTIVE SUMMARY

MSP, serving as Design Build GC, completed the Mayfair Collection Apartments located east of Hwy 45 and north of Burleigh Street in Wauwatosa. The project involved the construction of two apartment buildings—one for general occupancy and one age-restricted to individuals 55 and older—with a combined total of 80 units. Of these, 56 units were designated as affordable at the 30-60% CMI level. Construction began in mid-2023 and concluded in 2024, lasting approximately 15 months.

### **Inclusion Program Goals**

The DGC received support from a City of Wauwatosa TIF agreement and the Wisconsin Housing and Economic Development Authority (WHEDA) Low-Income Tax Credits (LIHTC). Consequently, the project had specific inclusion goals tied to both agreements. Wauwatosa collaborated with the DGC to accept the WHEDA EBE spending goals at 25% of the base project cost, which included both construction (hard costs) and professional services (soft costs). This approach marked a shift from the standard Wauwatosa inclusion program, as it combined the two cost categories into one overall goal while embracing the WHEDA EBE business inclusion target.

The WHEDA workforce inclusion program calls for the development team and its contractors to employ twelve different individuals from low income households in 12 different trades.

The Tosa workforce inclusion program seeks to have the project as a whole employ 25% of its new hires from any of the twelve most distressed Milwaukee County zip codes, with a provision allowing workers from low-income Milwaukee County households to qualify in this category, regardless of their zip codes. These workers are called “Targeted workers.”

It is notable that this is the second MSP project under the relatively new Wauwatosa inclusion program, indicating that familiarity and planning is the key to success. The development team exceeded both the workforce and business inclusion goals of 25% target worker hours; as well as 25% of the hard cost coming from Emerging Business Enterprises – achieving 41.9% Target Worker hours and 46.5% EBE Participation by the completion of the project. Though Wauwatosa inclusion program has EBE goals, the development team achieved 30.7% DBE Participation.



**Table 3: Final MSP Mayfair Workforce Participation**

Contractor	Sub To	Scope	Total Hours	# Of New Hires Workers	New Hire Hours	Target Workers Hours	Distressed Zip Codes Non-New Hires	50% Credit	Target Plus 50% Credit	Target Workers New Hire %
B V Tetzlaff, Inc aka Bohmann & Vick Inc.	MSP	General Labor	289.7	1	25.5	0.0	0.0	0.0	0.0	0.0%
Builder Service Group Inc.	MSP	Carpentry	1,523.3	7	469.0	0.0	0.0	0.0	0.0	0.0%
Dave Jones	MSP	Fire Sprinkler Fitter	990.0	2	222.1	0.0	0.0	0.0	0.0	0.0%
Foust Foundations	MSP	Carpentry	3,485.4	3	202.8	0.0	0.0	0.0	0.0	0.0%
Gypsum Floor	MSP	General Labor	446.0	1	54.0	0.0	0.0	0.0	0.0	0.0%
Jefferson Glass	MSP	Glazier	192.0	0	0.0	0.0	0.0	0.0	0.0	0.0%
JT RAMS, LLC	MSP	Roofers	907.0	5	97.0	88.5	339.0	169.5	258.0	37.6%
Kadlec Electric	MSP	Electrical	5,529.4	1	1,309.4	0.0	0.0	0.0	0.0	0.0%
KMI Construction, LLC	MSP	General Labor	2,399.0	8	778.0	208.0	529.5	264.8	472.8	164.6%
Kohlmann Chutes, Inc.	MSP	Sheet Metal	121.0	0	0.0	0.0	0.0	0.0	0.0	0.0%
Mid-States Concrete Industries	MSP	General Labor	286.5	1	34.0	0.0	0.0	0.0	0.0	0.0%
Midwest Drilled Foundation	MSP	Heavy Equipment	21.0	0	0.0	0.0	4.0	2.0	2.0	0.0%
On-Track Overhead Door	MSP	Overhead Door Installation	24.0	0	0.0	0.0	0.0	0.0	0.0	0.0%
P.L. Freeman	MSP	Sheet Metal	3,833.0	4	1,469.0	0.0	166.5	83.3	83.3	5.7%
Payne & Dolan, Inc.	MSP	Heavy Equipment	103.5	4	26.8	4.5	33.0	16.5	21.0	78.5%
Regency Janitorial, Inc.	MSP	General Labor	1,961.5	24	851.3	696.8	826.3	413.1	1,109.9	76.7%
Schindler Elevator Corp.	MSP	Elevator Construction	174.0	0	0.0	0.0	0.0	0.0	0.0	0.0%
Selarom Construction, LLC	MSP	Carpentry	9,639.5	15	4,205.0	1,640.5	1,058.8	529.4	2,169.9	51.6%
USA Heating & Cooling, Inc.	MSP	General Labor	2,182.8	4	464.2	0.0	354.7	177.3	177.3	38.2%
Wandel Contractors	MSP	General Labor	278.3	7	90.0	13.8	19.3	9.6	23.4	26.0%
Whitetail Concrete, LLC	MSP	Cement Finisher	65.5	0	0.0	0.0	0.0	0.0	0.0	0.0%
<b>TOTALS</b>			<b>34,452.4</b>	<b>87</b>	<b>10,297.9</b>	<b>2,652.0</b>	<b>3,330.9</b>	<b>1,665.5</b>	<b>4,317.5</b>	<b>41.9%</b>

**Table 4: MKE County Workforce**

Contractor	Sub To	Scope	Total Hours	MKE CNTY Hours	MKE CNTY Hour %
B V Tetzlaff, Inc aka Bohmann & Vick Inc.	MSP	General Labor	289.7	59.4	20.5%
Builder Service Group Inc.	MSP	Carpentry	1,523.3	0.0	0.0%
Dave Jones	MSP	Fire Sprinkler Fitter	990.0	60.9	6.1%
Foust Foundations	MSP	Carpentry	3,485.4	0.0	0.0%
Gypsum Floor	MSP	General Labor	446.0	0.0	0.0%
Jefferson Glass	MSP	Glazier	192.0	0.0	0.0%
JT RAMS, LLC	MSP	Roofers	907.0	778.0	85.8%
Kadlec Electric	MSP	Electrical	5,529.4	2,107.6	38.1%
KMI Construction, LLC	MSP	General Labor	2,399.0	992.5	41.4%
Kohlmann Chutes, Inc.	MSP	Sheet Metal	121.0	0.0	0.0%
Mid-States Concrete Industries	MSP	General Labor	286.5	0.0	0.0%
Midwest Drilled Foundation	MSP	Heavy Equipment	21.0	4.0	19.0%
On-Track Overhead Door	MSP	Overhead Door Installation	24.0	0.0	0.0%
P.L. Freeman	MSP	Sheet Metal	3,833.0	1,941.2	50.6%
Payne & Dolan, Inc.	MSP	Heavy Equipment	103.5	55.3	53.4%
Regency Janitorial, Inc.	MSP	General Labor	1,961.5	1,953.0	99.6%
Schindler Elevator Corp.	MSP	Elevator Construction	174.0	0.0	0.0%
Selarom Construction, LLC	MSP	Carpentry	9,639.5	4,642.8	48.2%
USA Heating & Cooling, Inc.	MSP	General Labor	2,182.8	1,928.5	88.4%
Wandel Contractors	MSP	General Labor	278.3	155.3	55.8%
Whitetail Concrete, LLC	MSP	Cement Finisher	65.5	0.0	0.0%
<b>TOTALS</b>			<b>34,452.4</b>	<b>14,678.2</b>	<b>42.6%</b>

**Table 5: Workforce by Distressed Zip code**

Distressed Zip Code	# of Workers	Total Hours
53204	33	1,975.0
53205	0	0.0
53206	2	141.5
53208	4	574.5
53209	0	0.0
53210	2	116.0
53212	0	0.0
53215	38	2,496.3
53216	1	10.5
53218	7	264.0
53225	1	9.0
53233	2	396.2
<b>Total</b>	<b>90</b>	<b>5,982.9</b>



## DBE Interview with P.L. Freeman



Prentice Freeman and his Crew Supervisor Alex outside finished Mayfair Apts.

Since 1981 P.L. Freeman Co. has been providing roofing service on both residential and commercial projects in Southern Wisconsin. In 2004 the company was incorporated by Prentice and has been growing ever since.

Employing workers from several different trade unions has made it possible for Freeman to provide work in 9 different construction disciplines. He has also recently hired an engineer from the Milwaukee School of Engineering to perform Business Information Modeling.

Company president Prentice L. Freeman, Jr. is a steamfitter by trade and has been providing quality service since 1999. He has prided himself on the integrity and excellence of his workers stating, "sometimes integrity is more important than pricing."

Freeman was a participant in a pre-project meet and greet held for Targeted Business Enterprises, which was held for prospective firms wanting to collect information about the project.

Prentice expressed his pleasure in working with MSP. He liked their attention to detail and their use of quality building materials. "I have worked on affordable housing projects in the past and seen cheap materials being used by contractors. MSP only uses quality materials and installs quality appliances. I'd have the appliances they used in my house."



Prentice looks forward to working with/for MSP in the future. Working on the MSP Mayfair project has afforded Freeman the opportunity to get his own bonding and bid future projects without necessarily having to collaborate with other firms.” Among other things, my growth has allowed me the ability to hire my own designer so that I can show up to a project with my own plans.”

## Onsite Interview

Vicenzo Vassallo



Vicenzo is a 21-year-old, who currently works for Kadlec Electric, and is new to the construction trades. His duties consist of basic electrical work such as splicing outlets.

He got into the construction field because he has family in the field. His uncle was his foreman on the MSP Mayfair project. Vincenzo has been performing electrical work for about 7 months now. His family owns a restaurant and that was where he worked prior to his journey into construction. In 5 years, he sees himself tapping into real estate or becoming a school therapist. Vincenzo encourages those interested in construction to try it. “You’ll never know whether it’s a good fit for you until you put yourself out there”, he says.



# Wauwatosa, WI

7725 W. North Avenue  
Wauwatosa, WI 53213

## Staff Report

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**File #:** 24-1519

**Agenda Date:** 12/3/2024

**Agenda #:** 2.

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Consideration of request by the Assessor's Office to waive the competitive bidding process, transfer funds and enter into a contract for expert assistance in the valuation of complex property up to \$60,000

**Submitted by:**

Sarah Tyrrell

**Department:**

Assessor's Office

A. Issue

In 2025, the Wauwatosa Assessor's office will be completing a city-wide revaluation. This process involves thoroughly reviewing all property assessments. The real estate landscape of Wauwatosa includes complex and unique properties. These distinctive properties can be challenging to value due to the lack of comparable properties and a market for such property types.

**B. Background/Options**

Wauwatosa has some very complex and unique properties within its jurisdiction. Many times the valuation of these properties can lead to assessment appeals and litigation. The Assessor's office is requesting the assistance of an expert for certain properties. This request comes as a proactive measure for current and future litigation strategies.

The Assessor has researched and spoken with numerous experts, but there has only been one company that we felt was experienced and knowledgeable enough for our specific needs.

The Assessor's office intends to enter into a contract with a nationally recognized appraisal firm that will offer assistance in the valuation of specific properties. 2024 carryover funds will be utilized as well as a transfers from the Reserve for Contingencies fund for the amount needed.

We feel it is likely that this valuation could result in litigation against the City in the future, so we can only provide limited detail in public. If the committee desires more specific information on this appraisal, we can discuss this topic in further detail with the City Attorney in closed session.

**C. Fiscal Impact**

Approximately \$8,000 in department carryover funds will be utilized. Additional funds of approximately \$52,000 will be transferred from the Reserve for Contingency fund to cover the remaining contract amount.

**D. Recommendation**

Approval to waive the competitive bidding process, transfer funds and enter into a contract with Federal Appraisal, LLC for expert assistance in valuation of complex property up to \$60,000.

*The Committee may move to convene into closed session for this item pursuant to Wis. Stat. §19.85 (1)(g) for the purpose of conferring with legal counsel for the governmental body who is rendering oral or written advice concerning strategy to be adopted by the body with respect to litigation*

*in which it is or is likely to become involved. The Committee may reconvene into open session to consider the balance of the agenda.*