



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