

# Request for Qualifications: Triangle Redevelopment Partnership CDA of the City of Madison

RFQ No. 10038-0-2021-DJ

August 27, 2021



In partnership with:

**GORMAN**  
& COMPANY

ONE**5**OLIVE

**TK**  
**WA**

**SMITHGROUP**

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Table of Contents	Team Qualifications	03
	Project Understanding + Approach	16
	Experience	19
	References	23
	Disclosures + Compliance	25
	Appendix	27



# Team Qualifications



# 01. Letter of Interest

August 27, 2021

Mr. Dan Johns  
Housing Development Specialist  
Community Development  
Authority of the City of Madison  
215 Martin Luther King, Jr.  
Boulevard, Rm. 130  
Madison, Wisconsin, 53703

RE: Response to Community  
Development Authority of the  
City of Madison Request for  
Qualifications  
#10038-0-2021-DJ

Dear Mr. Johns,

Gorman & Company, LLC, One 5 Olive, LLC, The Kubala Washatko Architects, and SmithGroup as a collective team, submit this Letter of Interest to the Community Development Authority (CDA) of the City of Madison related to the Request For Qualifications for a development partner to redevelop/revitalize what is commonly known as the "Triangle Site".

Gorman is expert in leveraging mixed-finance, mixed-income tools to re-envisioning public housing communities. The firm is very experienced with the RAD program, and the wide array of financing used in combination with RAD: Section 18; 4% and 9% LIHTC; HUD (d)(4) financing; HOME funds; CDBG; Federal and State Historic Credits; CNI Implementation and Planning grants, etc. Gorman's integrated services (development, construction, property management, and relocation services) provide a powerful platform to tackle this unique CDA redevelopment. Gorman is also a national leader in the use of Health Impact Assessments (HIA) to help communities, municipal leaders and practitioners to improve community health through community design. Gorman has partnered with Public Housing Authorities for the past three decades and is currently partnered with PHAs in nine states (Arizona, Arkansas, Colorado, Florida, Illinois, Indiana, Ohio, New Mexico, and Wisconsin).

One 5 Olive, LLC was started 5 years ago by brothers David Griggs and Greg Davis. Graduates of the LISC-supported Associates in Commercial Real Estate (ACRE) Program, One 5 Olive is a close collaborator with Gorman including as partners and community outreach in a Kenosha mixed-use, affordable housing development to be built in the Uptown neighborhood that was recently traumatized by the violence associated with the Jacob Blake shooting. One 5 Olive will, in addition to development services, support the Triangle team with resident and stakeholder outreach.

The Kubala Washatko Architects (TKWA) has completed over 60 planning and design projects in the greater Madison area over the past 35 years. Most notably, TKWA completed the neighborhood planning and design for the Bayview Foundation. TKWA worked closely with Foundation leadership to craft a thoughtful, deeply collaborative and culturally-sensitive engagement process. TKWA site and building design solutions have created a new, resident-supported vision for Bayview. TKWA will use the same care and empathic listening to led a process that imagines an exciting Triangle neighborhood where all residents can thrive.

SmithGroup will provide Site and Civil design services. Since the early 1990s, SmithGroup has developed successful working relationship that have lead to transformative Madison projects including the Bayview Foundation, Law Park, Garver Feed Mill, Madison Yards, The University of Wisconsin-Madison Plan, East Campus Mall, University Square and Alumni Park.

Our Team will be a thoughtful and creative CDA partner during its multi-phased redevelopment and revitalization of The Triangle. We have extensive and successful experience with Public Housing Authorities around the country. Our team also has a deep and unique connection to the Triangle. We have worked closely with residents and community stakeholders to envision a place that first serves the current residents while also imaging a special, sustainable and revitalized Madison neighborhood. We will carry this experience and these values through to advancing the goals of the residents, the CDA, HUD and the ambitions of the adopted Triangle Monona Bay Neighborhood Plan.

Sincerely,

**Gorman & Company, LLC**

**One 5 Olive, LLC**

**TKWA**

**SmithGroup**

By:   
Ted Matkom  
Wisconsin Market President  
(414) 617-9997  
tmatkom@gormanusa.com

By:   
Greg Davis  
Co-Founder  
(414) 699-7997  
greg@one5olive.com

By:   
Chris Socha, AIA  
Partner  
(262) 377-6039  
csocha@tkwa.com

By:   
Tom Rogers, PLA, ASLA  
Principal | Urban Design  
(608) 327-4402  
tom.rogers@SmithGroup.com

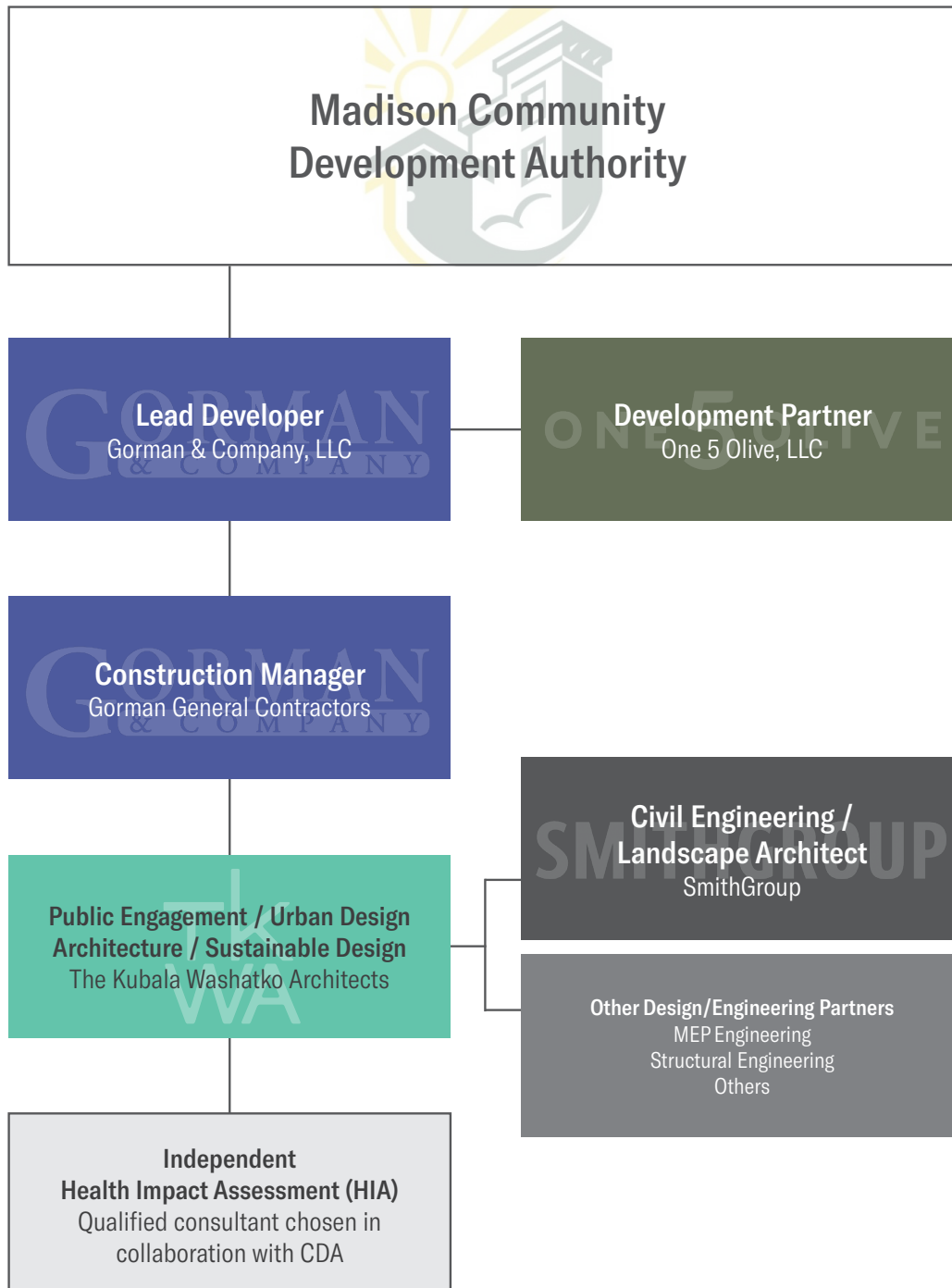
**GORMAN**  
& COMPANY

**ONE5OLIVE**

**TKWA**

**SMITHGROUP**

## 02. Team Structure



### Gorman & Company

Over the past 35 years Gorman & Company has worked closely with local governments and community groups to help communities meet their development, planning, economic and social goals. Gorman's staff brings a broad range of development, construction and management experience to the development process and applies these skills to solve problems and help communities bring their plans to reality. The Gorman & Company employees shown here all have extensive experience working to reposition public housing assets consistent with HUD guidelines and regulations.

Gorman & Company serves as General Contractor on all of its development projects through its affiliate, Gorman General Contractors, LLC. We believe this role is essential to control the quality of what we build. In addition, Gorman General Contractors, LLC acts as a construction manager and does not self perform any trades. This allows us to focus on work force initiatives to promote local contractors and to enable EBE, SBE, MBE, WBE and DBE entities to participate as subcontractors for our projects.

Gorman & Company has always been a leader of Workforce Equity and Diversity Programs as a WHEDA partner since the EBE program was first initiated. We have also worked around the country with our Public Housing partners to achieve maximum Section 3 participation.

We started the Milwaukee Builds program with Northcott Neighborhood House in Milwaukee. Milwaukee Builds trains previously incarcerated individuals how to perform the four main construction trades that provide family supporting wages: carpentry; plumbing; electrical and HVAC. After this classroom and hands on field training program, Milwaukee Builds generated a 90% continued employment rate for its reentry trainees a year after the trainees exited the program.

Within the Milwaukee Public School System, a program was developed to give 11th and 12th grade students a chance to participate in many developmental work experiences. Such experiences include work/study co-op program, after school or summer work, job shadowing, pre-apprenticeships, and internships.

Over the past year in the Madison area, we have fully revamped our approach and process to better recruit and empower disadvantaged subcontractors to participate in our projects.

#### Gorman General Contractors, LLC

Gorman General Contractors, LLC serves as General Contractor on Gorman & Company development projects. The company believes that the best way to ensure high quality and timely construction is to build its own projects. This level of accountability leads to greater attention to detail and the ability to support each construction phase. Gorman continually improves its construction practices with each successive development because everything is done in-house. Gorman General Contractors, LLC has constructed numerous multifamily communities and has often led the way with communities and with State Housing Authorities in establishing higher targets for minority and emerging sub-contractors.

Because it continues to build superior relationships with strong subcontractors, Gorman General Contractors, LLC can achieve top quality results and often finishes its projects ahead of schedule. Gorman's construction team consists of project managers, on-site field superintendents, and a Director of Construction - all of whom daily oversee work in progress.

**Gorman & Company**  
200 N Main St  
Oregon, WI 53575  
(608) 835-3900





**Brian Swanton**  
President & CEO

Brian Swanton transitioned into the role of President & Chief Executive Officer for Gorman & Company in 2018, after serving as the Arizona Market President since 2008. During his tenure as Arizona Market President,

Mr. Swanton led a multi-disciplinary team that designed and constructed over 1,000 units of new housing across the State with an emphasis on permanent supportive housing for families, seniors, veterans, and chronically homeless populations in both urban and rural locations. Mr. Swanton also redeveloped some of the first public housing units in the country using HUD's Rental Assistance Demonstration (RAD) program. As President & CEO, Mr. Swanton oversees all of Gorman's business units, including design, construction, development, property & asset management, and administration. Prior to joining Gorman, Mr. Swanton held various leadership positions in the non-profit sector, where he directed the preservation and construction of over 2,300 units of housing in 29 residential communities across Arizona and successfully refinanced and/or repositioned 1,702 units of existing affordable housing. Mr. Swanton also spent eight years of his career in the public sector, having served as the Housing Development Manager for the City of Scottsdale, as well as other positions in housing and community development with the City of Glendale, AZ, the Arizona Department of Housing, and the City of Quincy, MA.

Mr. Swanton holds a Master of Public Administration and a Bachelor of Science in Urban Planning, both from Arizona State University where he has taught graduate and undergraduate courses in housing finance and neighborhood revitalization. Brian is also certified as a Housing Development Finance Professional by the National Development Council. Brian is the past Chairman of the Board of Directors for the Arizona Housing Alliance, Arizona's only statewide affordable housing advocacy organization, guiding that organization through a merger with the Arizona Coalition to End Homelessness in 2017. Brian continues to serve on the Board of the newly merged organization, the Arizona Housing Coalition. Brian is also an active member of Greater Phoenix Leadership, the Arizona Multihousing Association, the Housing Advisory Group (HAG), the Affordable Housing Developers Council (AHDC), and the Affordable Housing Tax Credit Coalition where he advocates on the federal, state, and local levels to advance affordable housing resources across the U.S.



**Ted Matkom**  
Wisconsin Market President

Ted Matkom has held the role of Wisconsin Market President over the past 10 years with Gorman & Company and has also served as General Counsel for the past thirteen years. During his time at Gorman & Company, Ted Matkom

has closed over 30 deals totalling more than \$400 Million by utilizing Low Income Housing, Historic and New Markets tax credits as a primary source of equity. Ted has a wealth of experience in developing both residential and commercial real estate. He served five years on the board of directors for Menomonee Valley Partners, the non-profit development entity designated to revitalize Milwaukee's Menomonee Valley industrial park. For the past 8 years, Ted has been President of The Corridor, Inc., a nonprofit organization that has been charged with helping to redevelop the "30th Street Corridor" in the heart of Milwaukee. He has also been appointed for the past six years to the Board of Directors for the Milwaukee Area Workforce Investment Board, Inc.

Ted has a Bachelor of Arts in International Relations and Political Science from the University of Wisconsin-Madison, and a Doctorate of Law from Marquette University.

**Zach Johnson**  
Director of Housing Finance

Zach Johnson serves as the Director of Housing Finance, providing oversight and support on financing structure and HUD processes, with a primary focus on Gorman's Public Housing Authority relationships. Since joining Gorman in 2008, Mr. Johnson has led Gorman's deal structuring and financial underwriting efforts across all our national markets. Mr. Johnson has extensive experience with the RAD Program and other HUD programs, concentrating on structuring projects with Low Income Housing Tax Credits and other affordable housing resources. Mr. Johnson received his BA in Finance from the University of Wisconsin-Whitewater.



**Ron Swiggum**

Vice President of Construction

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Ron has over 25 years of experience in construction project management. As part of a vertically integrated development company, he has a breadth of skills beyond general contracting including coordination of design

professionals, space planning, life cycle costing, development and training of personnel, strategic business planning, risk management, staff leadership, profit and loss oversight, and customer relations. Ron directed construction for one of the largest "Green Communities" Public Housing Authority developments east of the Mississippi River and oversaw the construction for an innovative workforce housing development in Monroe County, Florida. He also served as Construction Project Manager for award winning Gorman & Company affordable housing development in Glendale, Arizona as well as a LEED Platinum project. Ron has most recently completed oversight for an \$80M Hotel and Convention Center in the City of Rockford, Illinois.



**Laura Narduzzi**

Director of Operations

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Laura received her degree in Hotel and Restaurant Management from the University of Wisconsin – Stout in 1989. She began her hotel career with The North Central Group, a hotel management and development company. She held various

positions in her 20-year tenure with that company including the Vice President of Operations. In that role, she was responsible for a \$90 million highly reputable hotel portfolio of Hilton and Marriott brands, which received several brand awards. She joined Gorman & Company in 2009 and now is the Director of Operations.

She directly oversees the operations of Gorman & Company's management division as well as supervises several corporate functions including facilities, marketing, training, and compliance. She works closely with the third-party management companies ensuring Gorman & Company's standards are synonymous across all markets. Laura works closely with Development, Design and Construction in the development process to insure strong viability and long-term sustainability.



# ONE 5 OLIVE

Over the last four years One 5 Olive has committed time, effort and resources to enriching the community through real estate development. From our company's inception it was our intention to deliver value that differs from the status quo, relying on our personal and professional experiences to provide unique products and services.



Development does not simply mean financial success and designing cool buildings, it is about accountability to ourselves and the community to deliver projects that will live on today and into the future. As a company we recognize there are a variety of social and economic dynamics that help connect people to physical space. Buildings are more than just brick and mortar, they are places where we experience heartfelt lifelong memories. With this in mind we ensure each development is constructed to maximize its full potential, inside and out, through planning, programming and attention to detail.

Our collective experience and education has allowed our firm to thrive in the current unconventional environment and will position us for success as the world changes and grows with every generation.

# ONE5 OLIVE



David Griggs  
Co-Founder

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I am a double major graduate from the University of St. Thomas with degrees in Real Estate and Entrepreneurship. I have over a decade of real estate experience in both commercial and residential property management, leasing and construction. Also, I am a graduate of the Associates in Commercial Real Estate (ACRE) program through Local Initiatives Support Corporation (LISC). My work history is varied in scope and scale, from single family homes to Class A office space. I feel fortunate to have had the opportunity to work for small firms as well as the world's largest commercial services firm, CBRE. Through my time with these organization, I have been able to synthesize best practices from each and build a company with my business partner that is focused on the future.



Greg Davis  
Co-Founder

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My path to One 5 Olive has been an eclectic one. From a political science major to producing issue based multimedia and then to researching legal precedent, my interest in examining and figuring out complex challenges has always driven me.

In the last 5 years I have been focused on how places and spaces affect community. I was the controller for Renters Warehouse property management, playing a critical role in growing their number of units from 30 to over 300. As a lover of learning, I am always in search of new opportunities. I have recently completed an Architecture & Design certificate at Harvard University and I am a graduate of the Associates in Commercial Real Estate (ACRE) program at Local Initiatives Support Corporation (LISC).

# The Kubala Washatko Architects



TKWA is a full-service architecture, urban design, and interior design studio with offices in Milwaukee, Cedarburg, and Seattle. We embrace a design philosophy of Wholeness, where the built environment supports and enhances both human activity and natural living systems.



The firm was founded in 1980 by principals Tom Kubala and Allen Washatko. We offer award-winning expertise for planning and architectural services for a wide variety of project types, and our firm currently employs 30 dedicated employees.

Allen and Tom's philosophy of collaboration, meticulous design, humility, and reverence for the natural world inspired a new generation of architects to take up their legacy. In 2016, the co-founders entrusted the studio to five partners. The new ownership team is drawn from a deep well of talent, expertise, and experience at TKWA. Collectively, this group represents the ideals, philosophy, and breadth of practice that Tom and Allen envisioned when they started the firm 40 years ago. This larger group of partners is helping expand TKWA's impact locally, nationally, and globally through thoughtful design.

## PROJECT EXPERTISE

Public Realm  
Cultural  
Workplace  
Education  
Religious  
Housing/Residential  
Hospitality  
Historic Preservation  
Sustainability  
Camps

## 3C. WORKFORCE EQUITY + DIVERSITY

In 2018, TKWA became the first Wisconsin design firm registered as a 'Public Benefit Corporation,' a designation given to for-profit companies chartered with an organizational mission of making a positive impact on society.

**Just.** We are committed to equity, diversity, fair pay and benefits, and the wellness of every staff member. Because accountability is essential, **TKWA participates in the JUST label**—a voluntary disclosure platform that makes our internal practices measurable and publicly available.

## SERVICES WE OFFER

Planning  
Architecture  
Programming  
Fund Raising Support  
Stakeholder Outreach  
Code + Zoning Review  
Sustainable Design  
Phasing Options  
Historic Preservation  
Cost Estimating  
Presentation Materials  
Graphic Design  
Wayfinding + Signage

TKWA has received the **AIA Firm Award**, which is the highest honor given by the state's professional service organization.

The Kubala Washatko Architects  
W61N617 Mequon Ave.  
Cedarburg, WI 53012  
(262) 377-6039





# The Kubala Washatko Architects

Cedarburg  
Milwaukee  
Seattle

## Chris Socha, AIA, LEED AP Partner

Architect and prominent urban Milwaukee advocate, Chris Socha leads TKWA UrbanLab. This new venture is focused on supporting ongoing community efforts in making downtown Milwaukee a more vibrant urban center. The studio's physical presence in the City allows TKWA to provide an active voice in shaping the future of Milwaukee at a time of dynamic change and growth in the downtown. A generalist in practice, Chris works to ensure that the built environment contributes to an active and livable public realm.



Click thumbnail to read Chris' interview in Blueprint Future Magazine

### Education

Master of Architecture, University of Wisconsin-Milwaukee  
Bachelor of Science in Architecture, University of Wisconsin-Milwaukee

### Registration + Certification

Member of American Institute of Architects  
Registered Architect in the State of Wisconsin

### Project Experience

Bayview Foundation, Madison, WI  
Vel R. Phillips Transit Center, Milwaukee, WI  
North 2nd Street Redevelopment, Milwaukee, WI  
TKWA UrbanLab, Milwaukee, WI  
Zocalo Food Truck Park, Milwaukee, WI  
Grand Avenue Mall Redevelopment, Milwaukee, WI  
Milwaukee Public Market, Milwaukee, WI  
The Ruckus, Shorewood, WI  
Urban Ecology Center Riverside Site Plan, Milwaukee, WI  
Nomad World Pub, Milwaukee, WI  
City of Milwaukee Parklet Design Guidelines  
Ogden Mixed-Use, Milwaukee, WI  
Lakefront Brewery, Milwaukee, WI  
Crank Daddy's Bicycle Shop, Milwaukee, WI  
Brady & Water St. Mixed-Use, Milwaukee, WI  
Colectivo Humboldt Ave. Corporate & Roasting Headquarters, Milwaukee, WI  
Colectivo Cafes (multiple), Milwaukee, Madison, and Chicago

### Teaching + Lectures

Adjunct Assistant Professor of Architecture, University of Wisconsin-Milwaukee, Fall 2007 - present  
Jury Critic, University of Wisconsin-Milwaukee 2002 - Present



**Why Chris?** Chris led design for Bayview Foundation and is passionate about creating places that bring community together. He believes vibrant settings emerge when care is given to creating invitations at all scales.



Therese Hanson  
Project Architect

As a project architect, Therese enjoys being involved with each phase of a project as it evolves from just a good idea into remarkable spaces that bring people joy. Each project is unique, but all projects need vision, a collaborative spirit, and an embrace of the details. Therese endeavors to bring these characteristics to every team. She believes that is our responsibility to leave the world more beautiful and more whole than when we found it, and each project is an opportunity to make that a reality.



**Why Therese?** Therese led public engagement with a diverse, multi-cultural community as part of site planning for the Bayview Foundation.

# The Kubala Washatko Architects

Cedarburg  
Milwaukee  
Seattle

- Education**  
Master of Architecture, University of Wisconsin-Milwaukee  
Bachelor of Science in Architectural Studies, University of Minnesota College of Design
- Registration + Certification**  
Registered Architect State of Wisconsin
- Community Outreach**  
Committee Member of Women In Design, an organization committed to supporting, connecting, and empowering women in the design fields.
- Project Experience**  
Bayview Foundation, Madison, WI  
Oriental Theater Renovation, Milwaukee, WI  
Racine Hotel, Racine WI  
Life Center, Milwaukee, WI  
Glenview Community Church Renovation, Glenview, IL  
Friedens Church Renovation, Port Washington, WI  
Kohler Memorial Theater Renovation, Kohler, WI  
Kohler Chapel, Mosel, WI



# SMITHGROUP

## 25

Urban Design Awards  
in the Past 2 Years

## 40,000

Acres of Planned  
Urban Developments

Cities are forged through social, ecological, and economic changes, and it's their dynamism and adaptive capacity that make them so remarkable. SmithGroup works to ensure future shifts in use and need can be engaged and seamlessly woven into the future form of our urban environments.



MADISON YARDS AT HILL FARMS, WISCONSIN

## RETHINKING CITIES FOR THE URBAN CENTURY.

The dynamic environment of a city represents a world of potential. With two-thirds of earth's inhabitants projected to live in cities by 2050, urbanizing areas are where we can realize the greatest social, economic and environmental impacts. SmithGroup recognizes the extraordinary opportunities and unprecedented challenges facing our cities. The specialized professionals who make up our Urban Design team have dedicated their careers to the layered complexities of the urban environment, and the rapid changes occurring within them. As urban designers in the urban century, we partner with the public and private sectors to create transformative, human-centered solutions that make a real difference for cities and their residents.



SmithGroup provided civil engineering and landscape design for the Bayview Foundation redevelopment.



# TOM ROGERS

PLA, ASLA



Tom's expertise lies in creating distinct and memorable spaces for people. His experience includes a broad cross section of project types from small urban areas to community and neighborhood redevelopment. He is adept at working with multiple disciplines and stakeholders to develop beautiful and sustainable solutions that embrace the values of a community to create powerful opportunities for positive growth.

## BAYVIEW REDEVELOPMENT

**Madison, Wisconsin.** Principal. The Bayview neighborhood is a unique community in the heart of Madison where affordable housing, diversity, gardening, and the arts all intersect. SmithGroup is crafting a new future based on updated housing and a new community center where quality of life takes center stage.

## MADISON YARDS AT HILL FARMS

**Madison, Wisconsin.** Project Designer. Master plan and urban design of a 22-acre mixed-use infill development. Includes replacing the existing 450,000 sf Wisconsin Department of Transportation headquarters and 15 acres of surface parking with a new 600,000 sf state office building, and a 1,500-vehicle parking structure. The new development, the result of a partnership between the state and private developer, is centered around a public green that will host a weekly area farmer's market, will include a new state office building, residential, retail, restaurants, grocery, and professional and medical offices. SmithGroup's services included urban planning and design, civil engineering, landscape architecture, and leading the public involvement process and City approvals for the private development team.

## GARVER FEED MILL

**Madison, Wisconsin.** Principal. Redevelopment of the historic Garver Feed Mill building into a maker's spot for local food and beverage production. The restored facility will provide additional space for area food producers to create and showcase their craft foods. The site for the feed mill will also showcase international sustainable design trends, including micro-lodging tiny homes.

## UNIVERSITY OF MADISON RESEARCH PARK, EXACT SCIENCES HEADQUARTERS, INNOVATION ONE

**Madison, Wisconsin.** Project Designer. SmithGroup worked with the University of Wisconsin Research Park to develop a master plan for creation of a vibrant, mixed use development on a 120+-acre parcel on the west side of Madison. The plan provides a framework for creation of a dynamic urban neighborhood featuring a mixture of retail and residential uses serving as the core of a world-class research park while providing a regional destination for Madison residents.

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### EDUCATION

Bachelor of Science in  
Landscape Architecture  
University of Wisconsin, 2001

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### REGISTRATIONS

Landscape Architect:  
Colorado  
Iowa  
Wisconsin

# Project Understanding and Approach



## 04. Statement of Project Understanding

**Gorman & Company, One 5 Olive, TKWA, and SmithGroup have reviewed and understand the required scope of services set forth by the CDA within this RFQ. Our extensive public-housing experience coupled with ongoing successful work within the greater Triangle area will help the CDA and its residents realize the greatest ambitions for this redevelopment, including the Brittingham, Gay Braxton, and Karabis Apartments, and the Parkside Towers/Townhouses.**

### **The Triangle Monona Bay Neighborhood Plan and its Impact**

The Triangle Monona Bay (TMB) Neighborhood Plan will be a central guiding document for the development team and its planning efforts. Our team will honor, respect and live the Shared Values articulated by the community (TMB plan, page 20). Significantly, we believe the principles outlined within the Triangle Monona Bay Neighborhood Plan can contribute to “advancing racial equity and social justice through the provision of high-quality housing and resident/community amenities.” Examples of design strategies that our team will consider include:

- Organize structures and outdoor spaces to help retain and promote a sense of community
- Consider opportunities to create wellness/activity/community center spaces within one or more buildings
- Celebrate the unique character of the area, including multicultural traditions
- Improve connectivity, safety, and convenience of pedestrians, bicyclists, and wheelchair users.
- Create appealing green spaces, including children's play areas, informal gathering areas, healing gardens, and native habitats
- Provide family-style housing units

### **Bayview Foundation as Template for Community Outreach + Collaboration**

Understanding cultural and cognitive differences, often subtle, can greatly influence the success or failure of community outreach efforts. How do you convey complex ideas in a way that can be universally understood? For TKWA this issue became manifest during planning for a new community center and residential housing within the Bayview Foundation Hmong and Asian community. The design team needed to ask questions in a way that could be translated and understood in three languages. TKWA quickly learned that asking the right questions, that phrasing questions carefully, and that making questions more tangible and relatable was essential to gaining quality feedback.

TKWA utilized multiple strategies to engage with the Bayview community, including group sessions, one-on-one conversations,

and surveys. A key part of the engagement also included a process called Pattern Writing, an approach which identifies key issues in simple, easy-to-understand, and non-technical language. Overall, this multi-faceted approach allowed Bayview residents a variety of ways to interact with the process, in the ways they individually felt most comfortable.

The Triangle neighborhood is predominantly made up of lower-income individuals with physical disabilities and/or mental health challenges. Understanding and responding to the unique needs of the population is important. According to Lauren Anderson, CDS housing site manager, the Triangle “...is their home, their safe place” (Wisconsin State Journal, July 5, 2021). As with Bayview residents, the design team must address potential concerns over the loss of established routines, or even the fear of losing a beloved home.

The experience and understanding gained during our community outreach for the Bayview Foundation will provide a roadmap for successful engagement with the diverse population resident in the Madison CDA ‘Triangle’. The strong relationship TKWA has developed with the Bayview Foundation can serve as an essential starting point for interaction with Triangle residents. We will seek input from other key Triangle neighborhood stakeholders and service providers including, but not limited to:

- Existing CDA residents and families
- Triangle Monona Bay residents and businesses
- Lauren Anderson and the CDA Property Management Team
- The Triangle Community Ministry staff and board
- Kim Walker and students of the Edgewood College of Nursing
- The UW Morgridge Center for Public Service
- Bayview Foundation
- Triangle Neighborhood Police Officer Steve Chvala
- NewBridge
- Journey Mental Health Center
- CDA Staff
- City of Madison Staff
- Alder Tag Evers

*Continued on next page*



## 04. Statement of Project Understanding

### Health Impact Assessment to Guide Healthy Resident Outcomes

A key tool our team will utilize to promote healthy outcomes in design for the Triangle redevelopment is the use of an independently produced Health Impact Assessment (HIA). HIAs are a tool that can help communities, decision makers, and practitioners make choices that improve public health through community design. HIAs help evaluate the potential health effects of a plan, project, or policy before it is built or implemented. These tools bring potential positive and negative public health impacts and considerations to the decision-making process for plans, projects, and policies that fall outside traditional public health arenas, such as transportation and land use. An HIA provides practical recommendations to increase positive health effects and minimize negative health effects.

Gorman & Company has successfully used HIAs (administered by a third party consultant) to inform the design process in three other Public Housing redevelopments, including the following:

#### Edison-Eastlake / Choice Neighborhoods HIA

<http://livableaz.org/choice-neighborhoods-hia/>

#### Coffelt Lamoreaux HIA

<https://www.pewtrusts.org/en/research-and-analysis/articles/hip/hip-case-study-coffelt-lamoreaux-public-housing-redevelopment/hip-case-study-coffelt-lamoreaux-public-housing-redevelopment>

#### Madison Heights HIA

<https://www.pewtrusts.org/en/research-and-analysis/data-visualizations/2015/hia-map/state/arizona/madison-heights>

### Bayview: A Model of Sustainable Development

In designing new residential buildings for the CDA Triangle complex our design team will help the City of Madison achieve its renewable energy and carbon emission reduction goals. During the Bayview Foundation redevelopment TKWA incorporated a variety of sustainable, yet budget sensitive, design strategies. The new community center and one townhouse building will achieve Passive House certification, which includes rigorous, quantifiable energy efficiency standards matched by defined occupant comfort levels. Passive House strategies include super insulation and airtight building envelope construction, continuous mechanical ventilation of fresh air for improved indoor air quality, and high performance window systems. In addition, all new buildings within the redesigned Bayview Foundation complex are designed to meet Energy Star standards.

During the Bayview design process TKWA collaborated with a multi-disciplinary team to identify, evaluate, and achieve the Foundation's sustainability goals. Project team partners included Madison-based Design Engineers, an MEP Engineering firm that provided full engineering design services, Madison-based Slipstream, a non-profit focused on energy/climate change issues, Precipitate, a Minneapolis-based firm that assisted with Passive House strategies and certification, and Eco-Achievers, a Chicago-based firm providing performance testing and verification. This team work and creativity will help meet and exceed sustainability goals for the Triangle.

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## 05. Impediments to Launching the Revitalization Process

Our Team does not foresee any insurmountable financial or legal issues that would impede the CDA, the residents and community stakeholders to achieve a vibrant and healthy residential community within The Triangle consistent with the goals as stated within this RFQ.

# Experience



# Experience

## **06. Describe the team's experience, as a team, on a HUD Asset Repositioning projects and programs.**

The team, through the lead developer Gorman & Company, has broad experience managing HUD-financed transactions through the rehab, redevelopment and new construction of Project-Based Section 8, Public Housing, RAD/ Section 18 and Mixed-Finance programs, tax credit, FHA-insured, and HOME/CDBG-assisted rental housing. The regulatory overlay statutes that impact these developments are numerous, including Davis-Bacon, URA, Section 3, Section 504, ADA, etc. As a seasoned developer and general contractor, Gorman has extensive experience implementing these requirements into the design and construction of our publicly financed developments.

Since the early 1990s, Gorman & Company has worked collaboratively with communities on significant revitalization efforts including public housing redevelopment. All development projects have a dedicated project manager with experience in that market. Our entire team has extensive experience in Wisconsin and recent experience in the City of Madison, giving us the local knowledge to ensure the success of the repositioning. Our team is well staffed with development, construction and design staffs who are knowledgeable in all these overlay statutes.

## **07. Describe the team's qualifications and experience in complying with HUD Section 3 requirements for resident employment and the use of local businesses.**

**The team has a strong preference to Section 3, minority owned, women owned and emerging businesses.** Gorman & Company strives to engage subcontractors and residents that are near the municipalities in which the project is located. This has a wide variety of benefits to the project schedule, quality, and budget.

Gorman & Company's policy, with respect to all services it renders to HUD-assisted developments, is to make every effort to meet or exceed the goals established by Section 3 of the Housing and Urban Development act of 1968, as amended, 12 U.S.C. 1701u ("Section 3"). Gorman & Company's track record exceeds the minimum standards in nearly all our developments. The team meets or exceeds requirements through on-the-job training, subcontracting provisions, advertising, specific informational meetings, coordination with State & local hiring agencies and Youthbuild to name a few.

In addition to being leaders in Section 3, Gorman has a strong history in employing Emerging Business Enterprise, Minority Business Enterprise and Women owned Business Enterprise firms. Gorman worked in partnership with the Wisconsin Housing and Economic Development Authority to develop the pilot program for the State EBE/WBE/MBE program. Gorman has consistently set the standard for percentages of EBE/MBE/WBE firms used on projects.

## **08. Describe the most challenging issues that were successfully handled in a prior HUD Asset Repositioning project in which any of the proposing team was involved.**

Through Gorman's experience working with Public Housing Agencies across the nation on the repositioning of their portfolios, the team has gained insight on alternative funding sources to use in combination with HUD sources. In past partnerships Gorman has used historic tax credits to renovate public housing while still achieving the transformational change envisioned by the Public Housing Agency. The first such instance was the Coffelt- Lamoreaux Apartment Homes in Phoenix, AZ.

*Continued on next page*



# Experience

Coffelt-Lamoreaux was a community of 301 dilapidated units on a 38-acre site comprised of 151 buildings. These units dated back to the early 1950's and were the first public housing units built in Arizona. Existing conditions were so bad the Housing Authority initially told Gorman to ignore Coffelt, but that path would have resulted in the closing of the neighboring school as 75% of students lived in Coffelt. In desperate need of capital improvements, the scope of work that was initially feasible based on the primary budget fell short of the Housing Authority's wishes. To exhaust all possible funding sources, Gorman was able to list the development on the national register and secure historic tax credits to provide additional equity. Through a careful consideration of design and scope Coffelt- Lamoreaux was transformed into a vibrant community and the neighborhood school was preserved because of Gorman's ability to produce an adequate capital stack for a complex transaction.

## 09. Provide examples of success in applying for Low Income Housing Tax Credit (LIHTC) allocations in WI.

### The team has secured allocations of Low-Income Housing Tax Credits in the state of Wisconsin since 1987.

In the thirty-four years since Gorman's first successful development, our team has cultivated successful partnerships with a wide range of groups including municipalities, corporations, housing authorities, nonprofit organizations, private investors, businesses, and community stakeholders. These partnerships, along with the development expertise of Gorman, have resulted in 69 LIHTC allocations in Wisconsin, with 62 projects successfully completed. Of the remaining seven, four are under construction and three are moving to closing. Recent WHEDA LIHTC allocations in the Madison area include Carbon at Union Corners (90); Generations at Union Corners (60 units); and Valor on Washington (59 units).

Our team assembles a wide array of resources necessary to tackle challenging development projects all while maintaining the desires and visions of the community. Of the 100+ projects completed by Gorman, there has never been a foreclosure, a default, and a general partner has never been replaced by the investor. Our team stands by our commitments and promises.

## Team Experience Working with Public Housing Authorities

Project Name	Location	Type	Unit #
Coffelt-Lamoreaux Apartment Homes	Phoenix, AZ	RAD/4% LIHTC/HTF/CDBG	301
Little Rock Towers	Little Rock, AR	RAD/4% LIHTC/CNI	597
Madison Heights I & II	Avondale, AZ	RAD/9% LIHTC/HOME	143
Heritage at Surprise	Surprise, AZ	RAD/4% LIHTC/CDBG	100
River at Eastline Village	Tempe, AZ	RAD/9% LIHTC/CDBG	56
Orton Keyes	Rockford, IL	RAD/4% LIHTC	175
The Grove	Rockford, IL	RAD/9% LIHTC	49
Sunset Terrace	Little Rock, AR	RAD/4% LIHTC	87
Pinecrest Tower	Cincinnati, OH	RAD/4% LIHTC	190
Carolyn Mosby	Gary, IN	Sec. 18/4% LIHTC/Historic	142
Escobedo at Verde Vista I& II	Mesa, AZ	9% LIHTC/Sec. 8 PBRA	132
Mesa Heights	Yuma, AZ	RAD	58



## Experience

### Team Experience in the Triangle Monona Bay Neighborhood

**Bayview Foundation is a nonprofit organization that provides housing and supportive services to a diverse population of approximately three hundred low-income residents in Madison's Triangle Monona Bay Neighborhood.**

The foundation engaged TKWA to craft a new plan that will dramatically reshape the existing property, which includes re-making all housing, play space, parking and a community center. TKWA sought to utilize a design process that would be both sensitive to the deeply personal nature of such a transformation, while also giving the ability to think expansively about how a new Bayview could enhance resident's lives.

Early planning efforts centered around resident engagement. Team members developed a deep understanding of how residents use and experience their own space. This work paralleled efforts by City of Madison planners who were actively creating a larger neighborhood redevelopment plan.

Working collaboratively with stakeholders, TKWA wrote a pattern language identifying key design issues. The patterns served to bridge cultural and language barriers amongst Bayview community members. They also helped facilitate conversations on connectivity between Bayview leaders and City planning officials.



### Balancing City and Community Goals

City of Madison officials were in the early stages of an update to the Triangle Monona Bay Neighborhood Plan when TKWA was asked to create a site plan for Bayview. The city's desire to reintroduce the historic street grid conflicted with resident concerns for the safety of the many children who call Bayview home. We worked to strike a balanced solution that introduced connections to adjacent city fabric while preserving a more intimate, pedestrian friendly setting.

A new, slow-moving auto street defines the western edge, creating new connections while keeping cars along the perimeter. The existing bounding streets are strengthened with new building frontages. The multi-sided structures simultaneously create new street walls while also connecting to the internal shared spaces. A community green serves as a shared commons for residents while the public is also invited by foot and bike via a network of human-scaled paths.



TKWA Project Manager Therese Hanson leads a stakeholder review of the Bayview site plan.



# References





# References

The following references are provided by Gorman & Company in their role as lead developer in the projects listed. All projects listed are also referenced in the table provided with the Experience section of this RFQ response.

<b>Gloria Munoz</b> Executive Director Housing Authority of Maricopa County 8910 N. 78th Ave. Building D Peoria, AZ 85345 (602) 744-4542 g.munoz@maricopahousing.org	<b>Titus Mathew</b> Housing Director City of Phoenix 200 W. Washington St. Phoenix, AZ 85034 (602) 262-4924 titus.mathew@phoenix.gov	<b>Jim O’Keefe</b> Director, City Of Madison Community Development Division 215 Martin Luther King Jr Blvd, Ste 300 Madison, WI 53703 (608) 266-7851 jokeefe@cityofmadison.com
<b>Project Dates</b> 2012 – 2020	<b>Project Dates</b> 2015 – ongoing	<b>Project Dates</b> 2015 – ongoing
<b>Project Names</b> Madison Heights I & II 1102 N. 6th Place, Avondale, AZ Coffelt-Lameroux Homes 1510 S. 19th Avenue, Phoenix, AZ River at Eastline Village 2102 E. Apache Boulevard, Tempe, AZ Heritage at Surprise 15832 N. Hollyhock Street, Surprise, AZ	<b>Project Names</b> Monroe Gardens 1441 E. Monroe Street, Phoenix, AZ Foothills Village Apartments 920 W. Alta Vista Road, Phoenix, AZ Soluna I and II 1825 E Roosevelt Street, Phoenix, AZ Harmony at the Park One and Two 1950 East Polk Street, Phoenix, AZ	<b>Project Names</b> Carbon at Union Corners 2418 Winnebago Street, Madison, WI Generations at Union Corners 2507 Winnebago Street, Madison, WI Valor on Washington 1322 E. Washington Avenue, Madison, WI

# Disclosures + Compliance



## 10/II. Disclosures + Compliance

It is the intent of Gorman & Company, One 5 Olive, The Kubala Washatko Architects, SmithGroup, and any other entity named in this RFQ response or that in the future would be on our Team for the Triangle redevelopment/revitalization, to comply with the Affirmative Action Ordinance of the City of Madison (MGO 39.02).

Gorman General Contractors, LLC is licensed within the State of Wisconsin and the City of Madison as a general contractor. The Kubala Washatko Architects and SmithGroup are both licensed as architects within the State of Wisconsin in their respective capacity.

Gorman & Company has reviewed the attached Contract For Purchase Of Services; however, if chosen, Gorman & Company reserves the right to further negotiate the terms of this agreement regarding financial and development responsibilities of the respective parties.



# Appendix



# Appendix

## Sample Development Schedule For Neighborhood Plan and Initial Phasing For The Triangle Redevelopment/Revitalization

MILESTONE	TARGET DATE
RFQ Proposal Accepted	October 2021
Finalize Development Agreement	December 2021
Outreach Strategy Meeting with Development Partners	January 2022
Initial Outreach Meeting with Residents and Community Stakeholders	February 2022
Health Impact Assessment Commences	February 2022
Finalize Health Impact Assessment	March 2022
Initial Plan Design Charette Meeting with Development Partners	April 2022
Initial Plan Design Meeting with Residents and Community Stakeholders	May 2022
Subsequent Plan Design Meetings w/Resident and Stakeholders	June/August 2022
Obtain necessary municipal zoning approvals	July/August 2022
Initial Cost Proposal/Finance Plan from Developer to Execute Neighborhood Plan	August 2022
Submit RAD application/Section 18 application (if applicable) to HUD	August 2022
Submit 4% LIHTC application to WHEDA for Phase 1	October 2022
4% 42(M) Letter and Bond Determination from WHEDA	December 2022
Solicit Proposals for Debt and Equity Partners	December 2022
Select Debt and Equity Partners	January 2023
Finalize Debt Term Sheet and Equity LOI with Selected Financing Partners	January 2023
Prepare and submit RAD Financing Plan	January 2023
Begin Due Diligence Calls with Full Financing Team	February 2023
75% Design Completion	March 2022
RAD Conversion Commitment (RCC) Issuance Date by HUD	March 2023
RAD/Section 18 Closing Package Submitted to HUD	April 2023
100% Design Completion	May 2023
Submit to Local Jurisdiction for Plan Review/Building	May 2023
HUD Approval to Close Received	May 2023
Financial Closing	June 2023
Relocation of Existing Residents from First Phase	July 2023
Construction Start	August 2023



# Thank you.

**GORMAN**  
& COMPANY

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WA

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