



# TRIANGLE SITE

## REDEVELOPMENT PARTNERSHIP

**Alexander**  
Company

 **STRANG**

 **bakertilly**  
now, for tomorrow

**JCP**  
CONSTRUCTION

**CULLEN**  
THE TOUGH JOB EXPERTS

 **salki**  
DESIGN

 **ONEIDA**  
Total Integrated  
Enterprises

**JSD**

Prepared for the Community Development Authority of the City of Madison  
Request for Qualifications | August 27, 2021

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August 27, 2021

**Mr. Dan Johns, Housing Development Specialist**  
**CDA Redevelopment c/o the Office of the Director of Planning**  
**Community and Economic Development**  
215 Martin Luther King Jr. Boulevard, Room 130  
Madison, WI 53703

Dear Mr. Johns:

The Alexander Team is pleased to present our qualifications for consideration in a partnership to create and implement a housing plan for the Triangle site, and we thank you for the opportunity to do so.

Through our team's extensive history with urban infill redevelopment, urban planning and revitalization, affordable and public housing, and community engagement, we understand and welcome the complexity of designing and implementing this redevelopment in collaboration with the Community Development Authority (CDA) of the City of Madison.

**We're local.** The Alexander Company began redeveloping the Rail Corridor - adjacent to the Triangle site, in the mid 1980s and has been a neighbor since. Each team member has long-reaching community roots and vital experience gained right here in the Madison and surrounding communities. We have approached, and present, these qualifications as stakeholders in the Madison community.

**We're diverse.** We have consciously built a team with representations mirroring that of the Triangle community that will be served, with cultural insight and knowledge necessary to create meaningful community engagement. Each step of our approach is fortified with extreme care, coordination, collaboration, and deliberation.

**We're experienced.** The CDA will benefit from a team ingrained in the Madison community, and a team with an extensive track record of successfully implementing complex, urban housing, and HUD-repositioning developments. Combined, the Alexander Team has 465 years of collective experience in urban planning, architecture, mixed-income housing, HUD asset repositioning, finance, development, property management, construction, and landscape architecture. Much of that experience has been earned here - in our greater Madison community.

We look forward to the opportunity of partnership in this process. Should you have any questions please contact me.

Respectfully,

**The Alexander Company, Inc.**



Joseph M. Alexander  
President

# TEAM QUALIFICATIONS



# TEAM QUALIFICATIONS / Letter of Interest

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The Alexander Company has assembled the most proven project team for the Triangle Redevelopment Partnership. You have a development partnership that will lead you through the entire process, taking you from concept to implementation, with experts providing ideas, advice, and guidance at every step.



The Alexander Company | Developer | [alexandercompany.com](http://alexandercompany.com)

The Alexander Company has developed numerous **multi-phase, mixed-use projects in the Madison market with an emphasis on affordable housing**, demonstrating a history of success for nearly 40 years. The Alexander Company specializes in reviving urban infill sites through the creative structuring of financing and economic development tools, with affordable housing at the forefront of nearly every development.



Strang | Site Planning, Architect, Public Engagement | [strang-inc.com](http://strang-inc.com)

Strang's proprietary protocol, **Listen | Discover | Design**, ensures stakeholders actively participate in conceptualizing a project. Strang's inclusive project approach allows them to provide exceptional planning and design for the most unique and challenging projects.



Baker Tilly | HUD Repositioning Consultant | [bakertilly.com](http://bakertilly.com)

Baker Tilly has 20+ years of experience working with housing authorities of similar size to the CDA, as well as many in the State of Wisconsin working in conjunction with WHEDA and HUD.



JCP Construction | General Contractor: Interior Build-outs | [jcp-construction.com](http://jcp-construction.com) **DBE**

JCP Construction is committed to employing a workforce that reflects the community in which they serve. Bringing more than 40 years of combined experience, JCP provides an array of construction services.



JP Cullen | General Contractor: Core & Shell | [jpcullen.com](http://jpcullen.com)

JP Cullen is a fifth-generation family-owned business Construction Manager and General Contractor, who has taken on some of the most challenging new construction and historic restoration projects across Wisconsin.



Saiki Design | Landscape Architect | [saiki.design.com](http://saiki.design.com) **DBE**

Saiki Design is an award-winning firm specializing in landscape architecture and sustainable design, with staff consisting of landscape architects, LEED accredited professionals, public artists, and master gardeners.



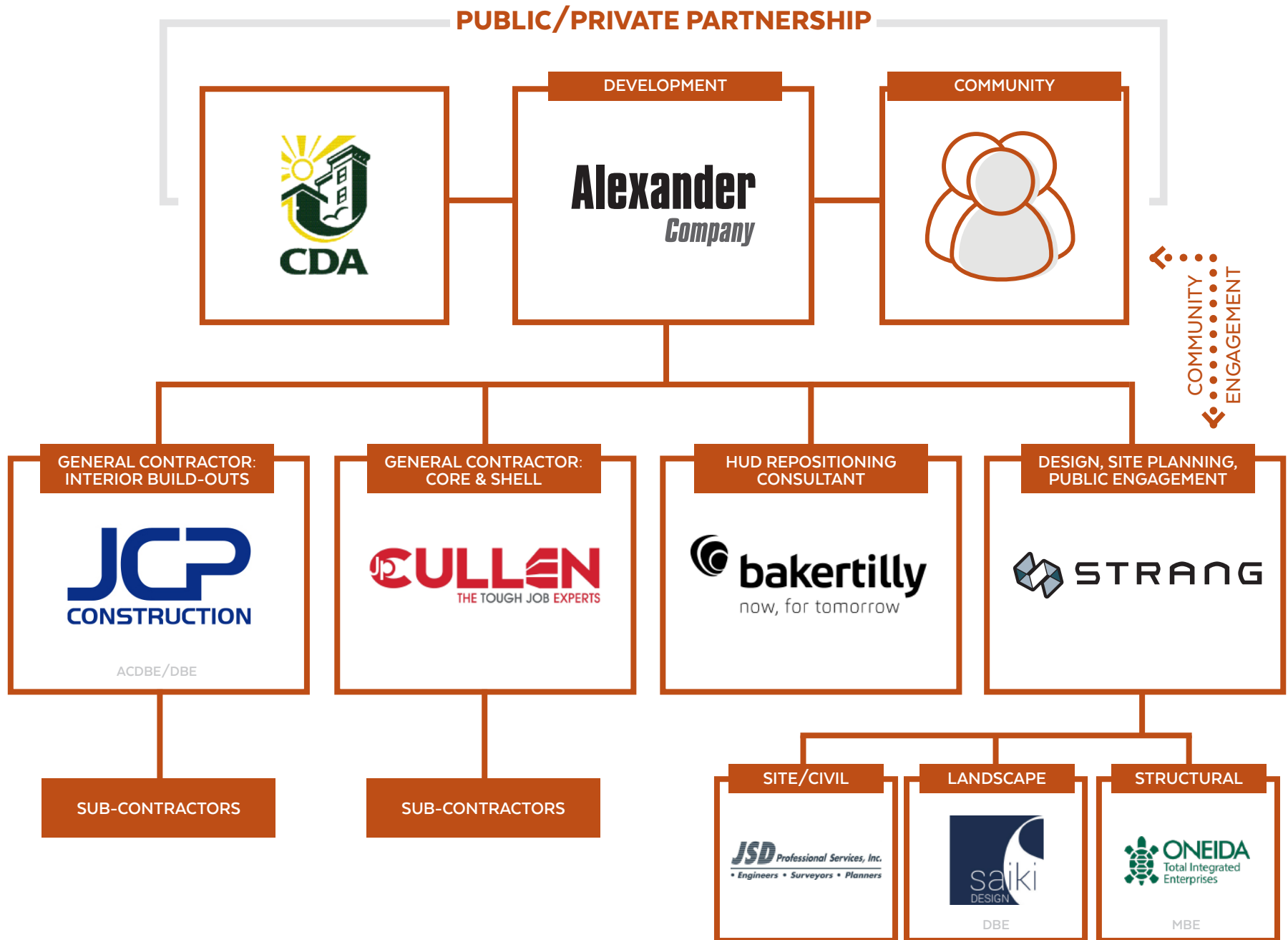
OTIE | Structural Engineer | [otie.com](http://otie.com) **MBE**

Oneida Total Integrated Enterprises (OTIE) is a full-service, multi-discipline engineering company owned by the Oneida Nation of Wisconsin, and have worked on a variety of local Madison projects.



JSD Professional Services | Site and Civil Engineer | [jsdinc.com](http://jsdinc.com)

With a reputation built on trust, service, and true teamwork, JSD provides complete professional planning, design, and construction services with their staff of professional engineers, stormwater management specialists, land surveyors, environmental specialists, and planners.



## TEAM QUALIFICATIONS / Team Structure

# TEAM QUALIFICATIONS / The Alexander Company Resume

*For nearly 40 years The Alexander Company has specialized in urban infill development, urban revitalization, historic preservation, and adaptive reuse.*

Nationally recognized for urban development and historic preservation achievements, the Madison, Wisconsin-based Alexander Company is a leading force behind the creation of affordable, workforce housing communities and solutions. As a master developer, the Company oversees the financing, design, construction, marketing, and property management of developments in-house, providing a diverse team of experts for owners, investors, and partners.

COMMUNITIES  
impacted

46

BUILDINGS  
developed

280

UNITS  
developed

7,928

RETAIL SPACE  
brokered (SF)

1.8M

Alexander Company projects create new urban focal points and restore glory to important landmarks that define cities. The company has completed several mixed-use “urban renaissance” master-planned developments, incorporating new construction, historic preservation or both. The Company has won numerous industry awards, including the National Preservation Honor Award from the National Trust for Historic Preservation, the Best Historic Rehabilitation Project Award from Affordable Housing Finance, the Charles Edson Award from the Affordable Housing Tax Credit Coalition, The Paul Gruenberg Award for Best Adaptive Reuse of a Building, several National Main Street Awards, among many others.

The Alexander Company is separated from other firms by managing all services in-house, providing a one-stop-shop for all real estate needs. This approach results in a single source of accountability for the client and brings efficiency, transparency and ease of communication to the otherwise arduous process of real estate development.

# TEAM QUALIFICATIONS / The Alexander Company Resume

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## DEVELOPMENT AND FINANCE

### Provides creative solutions

financial analysis, debt and equity procurement, land use evaluation, real estate acquisition and support, public regulatory approvals, scope control, communication and public presentations



## IN-HOUSE DESIGN

### Ensures quality

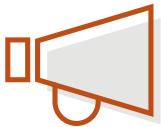
architectural design drawings, architectural contract reviews and administration, master and precinct planned campuses, civic spaces and streetscape and landscape design, site and building evaluation, code review and administration, historic preservation services



## CONSTRUCTION MANAGEMENT

### Avoids unexpected costs

construction contract review and administration, cost estimating, value engineering, scheduling, contractor qualification, contractor and sub oversight, contractor bid, construction close-out



## MARKETING AND PUBLIC RELATIONS

### Integrates management of promotional tactics

earned media relations and publicity, business-to-business and business-to-consumer marketing, collateral creation, website development, signage, media planning and purchasing, digital marketing, event planning



## PROPERTY MANAGEMENT

### Enhances property values through tested techniques

tenant retention programs, preventative maintenance programs, rent collection, lease preparation and audit, energy management, budget preparation, operations management, commercial brokerage, state and federal compliance, specifications review



# TEAM QUALIFICATIONS / The Alexander Company Resume

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**JOSEPH ALEXANDER**  
*President*

Joe's duties at The Alexander Company include senior management, development team oversight, stakeholder relations, new project development and operations oversight. He has overseen developments from Kansas City to Washington D.C. to Fort Worth. Joe has diverse experience in real estate administration, government and public relations. He has served as Special Assistant to the Secretary of the United States Department of Health and Human Services, where his duties included consultation and implementation in the areas of general management, budgeting and facilities development oversight.

## EDUCATION/TRAINING:

- J.D. – University of Wisconsin-Madison Law School
- B.A. – Political Science and History, University of Wisconsin-Madison

## COMMUNITY INVOLVEMENT:

- City of Madison Sustainable Madison Committee
- Unity Point Health - Meriter Foundation Board
- Salvation Army of Dane County Advisory Board
- Madison Museum of Contemporary Art Board of Trustees
- Wisconsin's National and Community Service Board
- University of Wisconsin System Board of Regents

# TEAM QUALIFICATIONS / The Alexander Company Resume

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**JONATHAN BECK**  
*Development Project Manager*

Jonathan coordinates development projects with specific responsibilities for financial structuring, market analysis, land use approvals, and property acquisition. He has specific skills in structuring complex financial tax credit investments and working with other community development programs. Since joining The Alexander Company, Jon's financial expertise has been key to creating thousands of units of high-quality housing across the country.

Jonathan has extensive experience working both as an investor and consultant with Low Income Housing Tax Credits, Historic Tax Credits, and New Markets Tax Credits. He has started his career with a national LIHTC syndicator, then worked with the National Trust for Historic Preservation and for their for-profit subsidiary, which makes both Historic and New Markets Tax Credits investments nationally, and was a senior consultant with Baker Tilly.

## EDUCATION/TRAINING:

- B.B.A. - Real Estate & Urban Land Economics - University of Wisconsin-Madison

## COMMUNITY INVOLVEMENT:

- Former Vice President - Goodman Community Center
- Consultant for Domestic Abuse Intervention Services (DAIS)

## RELEVANT EXPERIENCE:

- State and Federal Historic Tax Credits
- State and Federal Low Income Housing Tax Credits
- New Markets Tax Credits
- TCAP
- Tax Incremental Financing
- HOME
- CDBG / Section 108
- EDI and EDA
- Capital Magnet Funds
- City and Federal Housing Trust Funds
- Tax-Exempt Bonds
- HUD 221(d)(4)
- Brownfield Grants
- National Park Service Grants
- EPA Revolving Loan Funds
- Military Construction Funds
- HUD VASH Vouchers

# TEAM QUALIFICATIONS / The Alexander Company Resume

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**ADAM WINKLER**  
*Development Project Manager*

Adam is responsible for coordinating the entitlements process, which includes architectural coordination, neighborhood meetings and municipal approvals, for complicated master-planned developments throughout the United States. Adam has specific expertise in residential development, including high-quality multifamily housing as well as condominiums.

In addition, Adam is involved in securing construction financing, reviewing legal documents, conducting market research, and performing due diligence. He also has experience in commercial real estate leasing and sales.

## EDUCATION/TRAINING:

- B.B.A. - Real Estate & Urban Land Economics and Risk Management & Insurance - University of Wisconsin-Madison

## RELEVANT EXPERIENCE:

- State and Federal Historic Tax Credits
- State and Federal Low Income Housing Tax Credits
- New Markets Tax Credits
- Tax Incremental Financing
- HOME
- CDBG / Section 108
- Tax-Exempt Bonds
- HUD 221(d)(4)
- Brownfield Grants

# TEAM QUALIFICATIONS / The Alexander Company Resume

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**BARB PARRISH**  
*Director of Compliance*

Barb brings 20+ years of residential property management experience to The Alexander Company, where she is responsible for managing all aspects of affordable housing compliance for the company's growing real estate portfolio, including reporting to various regulatory agencies, owners and investors; staff training on program compliance and fair housing; conducting internal audits and reports; and creating policies and procedures. With extensive expertise in managing housing programs including but not limited to LIHTC, Section 8, RD, HOME, NMTC and CDBG, Barb maintains a working knowledge of all fair housing laws and ensures company-wide consistency in upholding them accordingly.

## EDUCATION/TRAINING:

- B.A. - Business Administration - University of Wisconsin-Madison
- Housing Credit Certified Professional (HCCP)
- Certified Occupancy Specialist (COS)
- Housing Compliance Manager for Home Funds (HCM-HF)

## RELEVANT EXPERIENCE:

- Low Income Housing Tax Credit (LIHTC)
- Section 8 / Housing Choice Voucher Program
- HOME Investment Partnerships Program (HOME)
- New Markets Tax Credit (NMTC)
- Rental Assistance Demonstration (RAD)
- Community Development Block Grant Program (CDBG)
- Tenant Protection Vouchers (TPV)
- Rural Rental Housing Program (RD Section 515)
- HUD VASH Vouchers



# TEAM QUALIFICATIONS / Strang Resume



For 86 years, Strang's 75+ talented professionals have transcended the traditional roles of planning, programming, and design to become proactive catalysts for client growth. Our client-centric and service driven nature has allowed us to develop long-standing relationships with industry-leading organizations of all sizes and disciplines.

Our innovative and client-focused guidance applies insight, creativity, and resourcefulness to every project. The complexity of our projects often demand such professional diversity. Our planning and design services focus on creating a roadmap to achieve your unique project needs. These services lay out easy to implement steps, accounting for budget restrictions and city approval timelines. We create plans that focus on comprehensive design, identify client input, explore opportunities or challenges and only then, consider design direction.

One of our greatest values to clients is the strategy of approaching assignments with an interdisciplinary team of in-house experts collectively dialed into your project.

This is Strang's proprietary protocol entitled, Design Synchronicity®. Here, we share big thinking to strengthen the quality and creativity of our solutions. These big ideas are more likely to occur when people of different disciplines, backgrounds, and expertise share their thinking.

Design Synchronicity® is a business model that expands beyond simple "teamwork" to embrace, elevate, and empower cross-functional excellence inclusive of client-driven input. Strang's integrated expertise ensures complex systems not only perform together, they precisely align to make each other stronger, even better. We believe in synchronous design, where the built environment is respectful of the natural environment and works in tandem to protect and improve human health.



## WHO WE ARE:

**91%** repeat clientele

**70+** pros to serve you

**85** years of experience

**IB EXECUTIVE CHOICE AWARD**  
2020 WINNER

For the past eight consecutive years the readers of InBusiness Magazine have voted Strang the Top Commercial Architectural Firm of the Year within the Greater Capital Region

(2013, 2014, 2015, 2016, 2017, 2018, 2019 & 2020)

# TEAM QUALIFICATIONS / Strang Resume



## ACTIONS SPEAK LOUDER THAN WORDS



Communities and organizations that are more diverse, are in fact the most innovative and ultimately achieve greater success. This success can be measured not only in prosperity, but also in the positive impact they have in society. The leadership at Strang recognizes this fact and is continually working to improve the diversity of talent within our offices.

At Strang we believe our actions speak louder than our words. Our mission is to inspire and enable all individuals to participate and reach their full potential. We strive to be an influential values-driven organization, where a diverse mix of talented people want to come, to stay, and do their best work. Our vision is to lead with compassion and build a culture of diversity that is committed to engaging the voices and respecting the humanity of all people. Our culture specifically encourages professional and personal development. We support lifelong learning and participation in community affairs while building a more diverse, inclusive workplace for all.

Although our resolve is unshakable, it does come with some very real challenges; historically, architecture, engineering, and interior design are industries lacking in diversity. For example, minorities make up only about three percent of registered architects nationwide. This number is unacceptable and as a company, we are working to improve it. Our work goes well beyond the governmental affirmative action plans we have in place. Our approach is multi-faceted, and includes educational partnerships, youth programming, collaboration with minority organizations, governmental agencies, economic development groups, and local businesses.

### EXAMPLES OF OUR CURRENT ACTIONS INCLUDE:

- Job shadow opportunities for grade school students
- An annual week-long STEAM Camp to expose minority middle school students to role models and hands-on experiences in the fields of science, technology, engineering, arts, and math
- Participation in high school career day programs
- An annual college scholarship program reserved for minority candidates pursuing a career in architecture, interior design, or engineering
- Summer internships for college students
- Collaborations with the Urban League, Girl Scouts, and the Boy and Girls Club of America
- Active participation in affirmative action programs for recruiting
- Serving on diversity committees within local business organizations
- We pledge to continue our efforts with vigor, seeking additional opportunities where possible and never giving up on the vision of a more diverse and inclusive society. This is our promise to you.



# TEAM QUALIFICATIONS / Strang Resume

Strang's design philosophy is that we try to elevate the voice of all stakeholders on every project that we do. We understand that a diversity in knowledge, experience, and point of view, will in-turn elevate our designs. We seek out ways to get more people involved because we know that if we build shared value within the process of design, the built product will be injected with energy and activity throughout its lifecycle. With the Triangle project we are doubling down on this philosophy and putting forth Strang's best at Community Engagement, bringing to the table a plethora of diverse experience from knowledge of architectural placemaking, to music therapy, to the lived experience as a member of the Hmong Community. We have a toolbox that will allow us to relay our planning expertise to the community, and simultaneously learn from the real experts: the Triangle Community itself.

## VILLAGE ON PARK

### *City and Community Collaboration*



- Community connections via the arts
- Reflect the diversity of the neighborhood
- Encouragement of children's creativity
- Pride in neighborhood
- A lasting community piece for all to enjoy
- Provide beautiful community-made art for the South Side
- Poetry and Art came together at the Mosaic unveiling
- Creation of a green space, an event space

## THE ARTERY

### *Art for Connective Placemaking*



- Decrease isolation of community
- Use of public space to contribute to the overall well-being of the community
- sound investment of public funds
- Urban regeneration
- Overall neighborhood improvement
- Making Milwaukee a better, safer community – one step at a time
- Social activation
- a learning computer lab
- Access to computer and Internet technology
- Think tank for community organizations
- Cultivate healthy community relationships

## MUSIC THERAPY

### *Music for Healing Interaction*



- Community engagement
- Rehabilitative needs
- Very Special Arts Festival
- Inclusive Volunteering
- Multi-generational involvement
- Assist with learning
- Maximize each person's unique efforts
- Grow and thrive in the community

# TEAM QUALIFICATIONS / Strang Resume



## **PETER TAN, NCARB, AIA, LEED AP**

*Principal-in-Charge / Director of Community Engagement /  
Lead Master Planner / Design Architect*

Peter Tan is an architect with 34 years of experience in master planning and designing award-winning civic, commercial, mixed-use, and urban design projects. As Strang's Chief Design Officer, he is responsible for the design vision and creative direction of the firm and has led the design of every Strang master planning effort for the past two decades. Peter's client-focused design philosophy involves a commitment to thoughtful listening in order to create environments that truly reflect users' needs and visions, while responding to their context of time and place. As a LEED AP, he is passionate about sustainable design and our collective responsibility as stewards of the environment.

## **EDUCATION/ACCREDITATIONS**

- M. Arch, B. Arch, in Urban Design - Cornell University
- Licensed Architect in WI, IL, IN, IA, KY, MA, MI, MO, MS, MN, NC, ND, NH, OR, PA, SD, TX & VA
- Languages: Malay, English

## **COMMUNITY SERVICE**

- Madison Region Economic Partnership (MadREP), Incoming Chair of the Board of Directors
- Fitchburg Center Development Review Committee, Member
- City of Madison Urban Design Commission, Former Member
- Westside Senior Coalition
- Beacon Homeless Day Resource Center

Peter is deeply committed to public service and the greater good of the community, serving on several boards and as a community volunteer. As incoming Chair of the Board of the Madison Region Economic Partnership (MadREP), his passion for equitable economic development and leadership, diversity and inclusion is evident in MadREP's ongoing partnership with the Urban League in their Annual Economic Development and Diversity Summit. His service on Madison's Urban Design Commission was borne out of his passion for design, placemaking and the public realm of our community.

Peter's years of volunteering, serving the elderly in the Westside Senior Coalition and at the Beacon Homeless Day Resource Center provide him with an empathy for the elderly and vulnerable members of our community. As a person of color, and his first-hand experience of the challenges as an immigrant from Southeast Asia, Peter brings to your project a deep understanding of the residents of the Triangle, and is uniquely qualified to lead the community engagement process and design of the Triangle Redevelopment Partnership.

## **RELEVANT EXPERIENCE:**

- Village on Park Master Plan & Redevelopment - Madison, WI
- Ho Chunk Gaming Madison Four Lakes District Redevelopment & Master Plan - Madison, WI
- Gebhardt Building/Sylvee Mixed Use Development - Madison, WI
- Weston Place Housing and Mixed Use Development - Madison, WI
- Agora at Fitchburg Center Mixed use Development - Fitchburg, WI
- City Center West Mixed Use Development - Madison, WI
- EZ Living at Meadow Crossing Housing Development- Sun Prairie WI
- Tamarack Trails Housing Development - Madison, WI
- The Towers and Illini Towers Housing - Madison, WI
- Rapid City Innovation District Master Plan - Rapid City, SD





# TEAM QUALIFICATIONS / Strang Resume



## **SUE LONG LEE, ASSOCIATE AIA**

### *Lead Master Plan Designer / Community Outreach*

Since joining Strang, Sue Long has become one of our most sought after master planners. He draws from his past cultural experiences as a Hmong immigrant and focuses on designs that encompass all nationalities and backgrounds. Sue Long is an inspired Architectural Designer with a passion and drive for creating memorable spaces and experiences in the built form and spaces between. He has a strong interest in integrating and applying emerging design technologies in contemporary architectural practices in both built and design processes. In his words, “Architecture is a poetry of the outdoor spaces and the built environment working in harmony with each other.” With his background in Urban Planning, along with his Architectural skill set, this combination allows Sue Long to bring his visions and skills to further any design team. Sue Long is also a design visualization specialist at Strang who will be able to help the Triangle and community stakeholders capture the vision of how your future will look and feel, using renderings and virtual reality.

## **EDUCATION/ACCREDITATIONS:**

- Master of Architecture - University of Southern California
- Bachelor of Architecture, Urban Planning Undergraduate Certificate - University of Wisconsin-Milwaukee
- American Institute of Architects - Wisconsin, Member
- Languages: Hmong, English

## **RELEVANT EXPERIENCE:**

- Flores Apartments, Facade Renovation - Los Angeles, CA
- Gentry Avenue Townhomes, Multi-housing Unit - North Hollywood, CA
- Tujunga Small-lot Subdivision, Multi-housing Unit - Los Angeles, CA
- Ho Chunk Gaming Madison Four Lakes District Master Plan - Madison, WI
- South Dakota School of Mines Master Plan, Rapid City, SD
- La Perla District Master Plan, Fashion Mall - Guadalajara, Mexico
- Milwaukee Area Technical College Master Plan - Milwaukee, WI
- Ascent Innovation Campus - Rapid City, SD
- Qiantan Cultural Center Master Plan - Shanghai, China
- Qiantan Office Tower and Hotel - Shanghai, China
- Hengqin Village Center, Hengqin Island - Zhuhai, China



Hmong New Year



Design Charrette



Ho-Chunk Gaming Madison Master Plan

# TEAM QUALIFICATIONS / Strang Resume



## KATHY WILLIAMS

*Director of First Impressions / Community Engagement Specialist*

A Director of First impressions brings her “A” game to work every day. Part of her DNA includes joy, attentiveness to detail and a willingness to assist. The impact her demeanor creates results in positive client engagements and increases productivity for employees. She provides exceptional service and support to client needs and the teams she is a part of. Having a willingness to learn new skills while integrating her experience elevates her on-going quest for learning. First impressions matter and she takes her role seriously.

## RELEVANT EXPERIENCE:

Certified Nursing Assistant – 14 years

- Assisted senior citizens with therapies for rehabilitative needs.
- Conduct home care including daily living tasks, assisting with therapies for rehabilitative needs, meal preparation, and light housekeeping.

Board-Certified Music Therapist – 21 years

- As an undergraduate at Augsburg University, was part of a team that organized a “Very Special Arts Festival” in Minneapolis, MN.
- Wrote scripts and developed programs so that people with mental and physical disabilities could perform for various organizations: Volunteer Recognitions, Rotary Clubs, Veteran’s Groups.
- Designed multi-generational Music Therapy sessions for families to attend and participate in together.
- Organized dances for people with developmental, physical, and mental disabilities for their families to attend and participate in.
- Engaged children without disabilities to participate in music activities with children who did have physical and mental disabilities in Penang, Malaysia.

Job Coach – REM, WI for people with intellectual and developmental disabilities and other complex challenges.

- Drove participants to their jobs and assisted them to perform required duties.
- Developed activities that engaged the client at their level.
- Aided in “maximizing each person’s unique efforts to learn, grow and thrive in the communities they call home.”

## EDUCATION/ACCREDITATIONS

- Bachelor of Science, Music Therapy, Augsburg University



Very Special Arts Festival



Music Therapy



# TEAM QUALIFICATIONS / Strang Resume



## MITCHELL BRANSCOMBE, ASSOCIATE AIA

*Public Interest Designer / Community Engagement Specialist*

Mitchell achieves consensus, maintains budgets and schedules, and attains project-critical goals, doing so through an earned value analysis system. His passion for community focused design makes him an active proponent for his projects, injecting energy and excitement into the design and building process. The best qualities in Mitchell as a citizen architect are the ones that make him happy to play while he works, serving as joyful and useful support to his community, clients, employer, and friends. He incorporates progressive design strategies into Strang's client-focused process to provide solutions that appropriately and distinctively address the specific requirements that make each project unique.

### RELEVANT EXPERIENCE:

- The ARTery - Milwaukee, WI  
*The project led by a Milwaukee organization BelNtween in which placemaking strategies were used to support grant funded community Arts festivals.*
- ICAN2 Labs - Milwaukee, WI  
*ICAN2 Labs is a re-imagined shipping container used as an outdoor learning center for community youth.*
- Washington Park Collaborative Studio - Milwaukee, WI  
*Focused on revitalizing the neighborhood through the use of Tactical Urbanism and provisional activation strategies.*
- Badger Prairie Needs Network Schematic Design - Verona, WI  
*This food pantry designed a community center addition through Strang's charrette process.*
- Ridgeway Community Center - Ridgeway, WI  
*The community center renovation is focused on the long-term needs of the community within newly occupied historic building.*
- UW Oshkosh Buckstaff Planetarium - Oshkosh, WI
- Summit Credit Union Branches, Various Locations

### EDUCATION/ACCREDITATIONS

- University of Wisconsin - Milwaukee, Bachelor of Architecture
- Undergraduate research focus in Public Interest Design, Place-making, and Tactical Urbanism
- American Institute of Architects - Wisconsin, Member
- Languages: Portuguese, English

### COMMUNITY SERVICE

- Freedom by Design
- City of Minneapolis Disaster Relief



Washington Park Alley Design



The ARTery Main Stage



The ARTery Community

# TEAM QUALIFICATIONS / Strang Resume



## **RUSSELL KNUDSON, PE, LEED AP, BD+C, BCXP** *MEP Specialist Energy Alternatives / Commissioning / LEED*

Russell leads Strang's energy modeling and sustainable design services and has nine years of consulting and engineering experience. He has experience providing energy consulting, commissioning, and HVAC design across multiple market sectors including industrial, commercial, higher-education, science + tech, and entertainment facilities. In addition to his engineering design experience, Russell leads a team that serves clients in early design energy modeling and facility retro-commissioning. Russell's typical involvement on a project is to demonstrate cost/benefit value for design alternatives that aide the building owner's decisions relating to building performance, financial return-on-investment, building maintainability, third-party certification (e.g. LEED, WELL, Green Globes, Energy Star), and environmental sustainability. He evaluates system alternatives as they relate to performance, energy efficiency, owners' requirements, maintainability, and sustainable design guidelines. Russell's specialized project work at Strang includes building façade solar analysis, LEED certification, mission-critical heating and cooling systems, campus centralized mechanical plants, geo-thermal, solar power, solar heating, carbon modeling, energy efficiency financing, critical lab fume exhaust and energy recovery systems, and high-rise life safety systems.

Russell brings his unique passion for sustainable design and community resilience to his public service on the Madison Urban Design Commission.

### **EDUCATION/ACCREDITATIONS**

- Masters of Science, Mechanical Engineering - University of Wisconsin-Madison
- Bachelor of Science, Mechanical Engineering - Texas Tech University
- Professional Engineer
- Wisconsin LEED Accredited Professional (BD+C) ASHRAE Building Commissioning Professional
- Associate Member, American Society of Heating, Refrigeration, and Air-Conditioning Engineers (ASHRAE)

### **COMMUNITY SERVICE**

- City of Madison Urban Design Commission Member
- Presenter, US Green Building Impact Conference 2018

### **RELEVANT EXPERIENCE:**

- Ho-Chunk Gaming Master Plan - Madison, WI
- Ascent Innovation Center Master Plan - Rapid City, SD
- UW-Platteville Karmann Library Renovation - Platteville, WI
- Milwaukee Area Technical College Main Building Renovation - Milwaukee, WI
- University Research Park Accelerator Building Retro-commissioning - Madison, WI
- National Guardian Life Headquarters Renovation - Madison, WI
- Mead Witter School of Music University of Wisconsin-Madison - Madison, WI
- Gebhardt Building - Madison, WI
- American Family East Regional Building - Madison, WI
- Strang Office - Madison, WI
- Summit Credit Union Headquarters - Cottage Grove, WI
- Eurofins Food Solutions - Madison, WI



# TEAM QUALIFICATIONS / Baker Tilly Resume

## Baker Tilly's depth and breadth of resources

Baker Tilly is a leading global advisory, tax, and assurance firm whose specialized professionals help clients succeed today and better anticipate the challenges of tomorrow. They originated in 1931 with a commitment to deliver innovative financial solutions and business strategies. Key firm facts include:



**4,600+**

*employees across the U.S.,  
including 450 partners*



**70+**

*Best Places to  
Work awards*



**50+**

*office locations  
across the U.S.*



**9th**

*largest U.S. accounting  
and advisory firm*



**\$1B**

*firm revenue in  
fiscal year 2021*

## 20+ years of experience

Baker Tilly has more than 20 years of experience working with housing authorities of a similar size to the CDA, as well as many in the state of Wisconsin working on conjunction with WHEDA and HUD. In Wisconsin, we have worked with Milwaukee, Green Bay, Wausau, Wisconsin Rapids, Kaukauna, and Antigo. We have worked on portfolio repositioning with housing authorities such as Flint, MI, LaGrange, GA, and Anne Arundel, MD.

## At the forefront of the RAD program initiative

Baker Tilly served as a sub-contractor to HUD on a national contract to provide technical assistance to PHAs for the RAD program from 2012 - 2014. They assist PHAs in assessing their developments as it relates to RAD/Section 18 feasibility as well as present on the topic at several state and regional housing conferences. Baker Tilly collaborates with developers experienced in housing and the HUD repositioning programs to efficiently and effectively address the challenges and opportunities presented with each project. In addition, Baker Tilly has a long track record with WHEDA and works on development teams with many successful projects annually.

**28,000** UNITS FOR RAD APPLICATIONS

**2,807** UNITS CLOSED RAD TRANSACTIONS

**\$431M** DEVELOPMENT COSTS

By teaming with Baker Tilly, we will be able to help the CDA convert your housing units under HUD's repositioning tools, access other affordable housing financing options, and navigate the development process successfully. We will review the details of each project, potential funding sources, and capital needs as we work on the program to confirm the best project structure.

# TEAM QUALIFICATIONS / Baker Tilly Resume

## Commitment to Diversity, Inclusion and Belonging for Success (DIBS)

At Baker Tilly, diversity, inclusion and belonging is who we are rather than what we do. Creating an environment where all team members are valued empowers us to bring our authentic selves to work each day. When our contributions reflect our individual best, we achieve better results for CDA.

Belonging is a core Baker Tilly value. We foster a deep level of mutual respect where each one of us feels seen, heard, value, and connected. Each team member commits to upholding a diverse and inclusive workplace driven by fairness, compassion, and equality.

Throughout the firm, you will find our DIBS philosophy and practices embedded in everything we do. We hire people who bring new perspectives and experiences. We embrace our differences and believe a more open, connected world serves everyone better. DIBS is the lens that helps us see things more broadly and lights the path for us to follow. This benefits our people, our clients, and our communities.

### DIBS Steering Committee

Baker Tilly's national DIBS steering committee is designed to strengthen our firm's culture of diversity, inclusion, and belonging. Theresa Nickels, principal and general counsel, chairs this committee. A cross-section of leaders across the firm oversees our strategy - from inclusion-related communications to accountability measures for our key diversity goals and coordination of our signature initiatives described to the right.

Visit [bakertilly.com](https://bakertilly.com) for additional information on these initiatives and to see public recognition and awards from independent publications for our diversity and inclusion efforts.



Growth and Retention of Women (GROW)



Supporting Opportunity, Advancement and Retention for all (SOAR)



NexGen: joining workforce generations



PRIDE team member network



Racial Equity Action Plan and focus on social justice



Baker Tilly Foundation support for racial justice advocacy

CEO **ACTION** FOR DIVERSITY & INCLUSION

Tone from the top: CEO Action for Diversity & Inclusion

# TEAM QUALIFICATIONS / Baker Tilly Resume

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**JENN KRIEHER, MPA, LEED AP**  
*Manager*

Jenn has 17 years of affordable housing experience, with a strong housing preservation background. Working for 11 years at the U.S. Department of Housing and Urban Development (HUD) in the office of Recapitalization gave Jenn the opportunity to interact directly with owners of affordable housing, including Public Housing Authorities (PHAs). As a RAD Transaction Manager at HUD, Jenn became familiar with repositioning from public housing to Section 8. Her previous position at the Housing Authority of the City of Milwaukee gave Jenn insight on resident relations, relocation, and reporting to HUD. Jenn earned her MPA degree as a HUD Community Development Work Study Scholar. She has working relationships with key players in housing across the country and deep knowledge of RAD and SAC programs.

## EDUCATION/ACCREDITATIONS:

- Master of Public Administration (MPA) - University of Wisconsin-Milwaukee
- Bachelor of Arts in political science - Marquette University

## INDUSTRY INVOLVEMENT:

- National Association for Housing and Redevelopment Officials (NAHRO)
- Women in Government Relations
- Community Development Financial Institutions (CDFI) Women's Network
- Frequent speaker at national and regional affordable housing conferences, including the National Association of Housing and Redevelopment Officials, National Leased Housing Association, and National Housing & Rehabilitation Association

## SPECIFIC EXPERIENCE:

- Strategically analysis affordable housing portfolios for developers and housing authorities to determine potential repositioning and recapitalization options
- Provides consulting to developers and housing authorities on all repositioning programs offered by HUD, including the Rental Assistance Demonstration Program (RAD), Section 18 Demolition and/or Disposition, RAD/Section 18 Blends, and Voluntary Conversion, from initial application to closing
- Consults on and prepares all pre-application and application components for Section 18 Demolition and/or Disposition Applications through HUD's Special Application Center (SAC), including application for Tenant Protection Vouchers (TPVs) and project-basing

# TEAM QUALIFICATIONS / Baker Tilly Resume

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## **DONALD N. BERNARDS, CPA**

*Partner*

Don is well versed in structuring affordable housing transactions, including the tax issues. Don is adept at creating a checklist of major issues for each project that can put a deal at risk. Immersed in the affordable housing practice, Don has a wide range of experience with projects, owners, and investors and has built a wide network of contacts within the field. His enthusiasm and passion for the industry are infectious. "It's not just about numbers," he says, "it's about the end product and growing capacity." Don has worked on affordable housing transactions in 26 states, and has been active in many aspects of affordable housing since 1999.

### **EDUCATION/ACCREDITATIONS:**

- Bachelor of Business Administration in Accounting - University of Wisconsin-Madison

### **INDUSTRY INVOLVEMENT:**

- Wisconsin Institute of Certified Public Accountants (WICPA)
- American Institute of Certified Public Accountants (AICPA)
- American Bar Association - Member Forum on Affordable Housing & Community Development Law; also, Tax Credits and Equity Financing Committee
- Tax Credit Advisory Board Member for State Housing Finance Agency
- Frequent speaker at regional and national conferences on affordable housing issues, including the RAD Collaborative, Affordable Housing Finance, National Housing & Rehabilitation Association, National Association of Housing and Redevelopment Officials, and more

### **SPECIFIC EXPERIENCE:**

- Manages a portfolio of clients with the affordable housing industry utilizing various programs including Section 42 and Section 8
- Provides financial modeling for acquisition/rehabilitation and new construction tax credit deals
- Part of HUD technical assistance team providing Rental Assistance Demonstration (RAD) technical assistance nationwide to housing authorities through one-on-one training as well as presenting at educational conferences and seminars
- Consults on various 4% and 9% deals that have a RAD award and are working toward closing
- Assists in the preparation of Low Income Housing Tax Credit (LIHTC) applications and applications for soft sources of financing, including HOME, Affordable Housing Program (AHP), and Community Development Block Grants (CDBG)
- Determines optimal Historic Tax Credit transaction structure, works with attorneys to ensure structure abides by safe harbor guidelines and advises on maximizing qualified rehabilitation expenditures (QREs)
- Assists with obtaining debt for various types of affordable housing, including taxable and various tax-exempt debt totaling more than \$350 million over the past five years
- Provides assistance with portfolio acquisition and disposition strategies and implementation
- In the past five years, assisted in raising and closing more than \$500 million in equity for LIHTC and Historic Tax Credit projects
- Assists with cost segregation studies for affordable housing properties
- Involved in many tax aspects of a project, from transaction structuring to planning and preparation

# TEAM QUALIFICATIONS / Baker Tilly Resume

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## **KAITLIN M. KONYN**

*Senior Manager*

Kaitlin specializes in consulting with, and assisting developers to apply for various sources of funds to build multi-family, affordable housing developments. She provides advisory services on real estate transactions that typically involve tax incentives such as Low Income Housing Tax Credits (LIHTC).

### **EDUCATION/ACCREDITATIONS:**

- Bachelor of Science in Housing Studies - University of Minnesota-Twin Cities

### **COMMUNITY INVOLVEMENT:**

- Rodney Scheel House Foundation Board Member

### **SPECIFIC EXPERIENCE:**

- Manages client relationships including nonprofit, for-profit, and public housing authorities and assists with transaction structuring from concept to closing
- Assists in the preparation of LIHTC applications including 9% and tax-exempt bonds
- Consults on applications for soft financing sources including HOME and CDBG
- Prepares applications for AHP funds to various Federal Home Loan Bank regions including Boston, Chicago, Cincinnati, Indianapolis, and Pittsburgh
- Provides financial modeling for acquisition/rehabilitation and new construction LIHTC deals
- Provides consulting to housing authorities and developers on the US Department of Housing and Urban Development (HUD) Rental Assistance Demonstration (RAD) program from initial application to award to financing plan to RCC to closing
- Strategically analysis portfolios for housing authorities to determine potential repositioning options
- Assists with tracking and monitoring construction budgets
- Assists in coordinating and executing due diligence for prospective mixed-use and residential developments
- Assists in securing equity for LIHTC projects through networking with investors and reviewing letters of intent
- Completes first year tax credit delivery calculations
- Provides Year 15 analysis for LIHTC projects



# TEAM QUALIFICATIONS / JCP Construction Resume



## We are JCP

Today, JCP Construction employs a workforce reflective of the diverse and hardworking Wisconsin community we serve. Our deep experience in pre-construction, general contracting and construction management allows us to contribute on a wide-range of projects. And our expertise in self-performing selective demolition, cast-in-place concrete, and rough & finish carpentry on projects sets us apart in the industry. At JCP Construction, we are proud to have contributed to some of Wisconsin’s most recognizable structures, including the Fiserv Forum, Summerfest grounds, and Northwestern Mutual headquarters.



OVER  
**50YRS**

LEADERSHIP  
EXPERIENCE

OVER  
**500**

COMPLETED  
PROJECTS

OVER  
**\$400M**

DEVELOPER  
INVESTMENTS



# TEAM QUALIFICATIONS / JCP Construction Resume



## JAMES PHELPS

### *President*

As President, James works closely with the project team to ensure that cost, schedule, and quality commitments are met. He oversees project cost management, identifying and preparing bid packages for design and construction phases, reviewing bids, and negotiating subcontract work.

James brings 19 years of experience in the construction industry, starting as an apprentice and proceeding through various fields, engineering, and project management roles for projects ranging from \$100k to \$50M. Project types range from residential to complex commercial structures.

### EDUCATION/ACCREDITATIONS:

- B.A. Finance - University of Wisconsin-Milwaukee
- Completed Practices for Effective Construction Project Management - University of Wisconsin-Madison
- ACRE Commercial Real Estate Certificate - Marquette University
- OSHA 10-hour Training Program
- Project Manager Forum - AGC
- United States Green Building Council (USGBC) Green Building Principals Seminar
- LEED Accredited Professional

### COMMUNITY INVOLVEMENT:

- Dr. Martin Luther King Jr. Dr. Bid #8 - Board Member
- MMAC's COSBE - Board Member
- MMAC's The Business Council - Board Member
- Association of General Contractors (AGC) - Milwaukee
- The Repertory Theatre - Board of Trustees

### RELEVANT EXPERIENCE:

- Parish Battle Apartments - Milwaukee, WI  
*HUD-financed community, rehabilitation of 24 units to meet HUD standards*
- Calvary Apartments - Milwaukee, WI  
*HUD-financed community, rehabilitation of 48 units to meet HUD standards*
- King Drive Commons Scattered Sites - Milwaukee, WI  
*Affordable multi-family community, construction management provided*
- Westlawn Scattered Sites - Milwaukee, WI  
*Affordable multi-family community, construction management provided*
- The North End Phase II - Milwaukee, WI  
*4% LIHTC housing community, rough carpentry provided*
- Bader Philanthropies World Headquarters - Milwaukee, WI  
*Construction management provided, \$8M*
- Fiserv Forum - Milwaukee, WI  
*Prime site concrete and security, as well as framing, railings, and millwork packages, \$6.7M*
- Northwestern Mutual Tower & Commons Project - Milwaukee, WI  
*Prime waterproofing contractor and framing and millwork carpentry packages, \$7M*
- Scattered Sites III - Milwaukee, WI  
*24 single-family infill houses for Universal Housing Systems, \$6.3M*
- Project Honor - Racine, WI  
*Museum located on the S.C. Johnson Campus, LEED Silver Certified, \$7M*
- First Place Condominiums - Milwaukee, WI  
*154 units, 263 parking stalls, \$50M*

# TEAM QUALIFICATIONS / JCP Construction Resume

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## **CLIFTON PHELPS**

### *Vice President of Business Development*

As Vice President of Business Development for JCP Construction, Clifton focuses on building relationships, project forecasting, marketing, preparing bid packages, and working with leadership on strategic elements of upcoming projects.

His career includes more than 20 years of experience in commercial real estate, property management, public policy, and non-profit management.

Clifton recently served as the co-chair for the Running Rebels Community Organization Capital Campaign in which they successfully raised \$4.1 million. He is also a former chairman of the African American Chamber of Commerce - Wisconsin. While serving, he led the transition to a new Executive Director and coordinated the AACCW move to their new location on King Drive.

Clifton currently serves on the Martin Luther King Economic Development Corporation Board and is on the Minority Business Enterprise Input Committee for the North Central Supplier Diversity Council.

Clifton was honored in 2018 as a winner of the *Milwaukee Business Journal's* 40 Under 40 Award.

## **EDUCATION/ACCREDITATIONS:**

- “Building a High Performing Minority Business Program” - Tusk School of Business, Dartmouth
- Master of Arts in Public Administration - University of Wisconsin-Milwaukee
- Bachelor of Arts in English - Tuskegee University
- ACRE Commercial Real Estate Certificate - Marquette University

## **COMMUNITY INVOLVEMENT:**

- Running Rebels Board Member
- Former Chairman of the African American Chamber of Commerce - Wisconsin
- Martin Luther King Economic Development Corporation Board Member
- Wisconsin Healthcare Engineering Association
- National Association of Minority Contractors
- International Facility Management Association

# TEAM QUALIFICATIONS / JCP Construction Resume

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## JALIN PHELPS

### *Project Executive*

As a partner and Vice President of Field Operations, Jalin is a critical component of JCP Construction, positively impacting the company's bottom line through planning, directing, and coordinating operations in support of JCP's growth. Jalin is responsible for ensuring every project is expedited and completed with the utmost quality and to the satisfaction of clients. He is directly involved in all facets of JCP's projects including estimating, preparing submittals, reviewing shop drawings, scheduling subcontractors, assessing and evaluating field crews, compliance and projected needs to maintain quality. Jalin establishes, communicates, and evaluates progress towards field goals and deadlines, while managing budgets and coordinating materials to ensure ongoing operations.

Jalin brings over 20 years of experience in the construction industry, starting as an apprentice and working his way up through leadership roles in the field and transitioning into the office. His wide range as an experienced carpenter has equipped him with valuable knowledge and skill in nearly every aspect of construction. Jalin has been integral to residential, multi-family, and commercial projects ranging from \$100,000 to \$50M.

### EDUCATION/ACCREDITATIONS:

- ACRE Commercial Real Estate Certificate - Marquette University
- OSHA 30-hour Training Program
- SE Carpentry Training Center of Wisconsin - Completed Carpentry Apprenticeship
- Supervisor Training Center

### COMMUNITY INVOLVEMENT:

- SE Carpentry Training Center of Wisconsin - Board Member

### RELEVANT EXPERIENCE:

- The Moderne - Milwaukee, WI  
*HUD-financed community, subcontractor for door and hardware installation*
- Bader Addition and Alterations - Milwaukee, WI  
*Addition and alterations at bank facility for Bader Philanthropies, \$4M*
- Bader Philanthropies World Headquarters - Milwaukee, WI  
*Construction manager, \$8M*
- Froedtert and the Medical College of Wisconsin - Milwaukee, WI
- Fiserv Forum - Milwaukee, WI  
*Prime site concrete and security, as well as framing, railings, and millwork packages, \$6.7M*
- Northwestern Mutual Tower & Commons Project - Milwaukee, WI  
*Prime waterproofing contractor and framing and millwork carpentry packages, \$7M*
- Marquette Law Office - Milwaukee, WI  
*Concrete package, \$8M*
- University of Wisconsin-Milwaukee - Milwaukee, WI  
*Cambridge Commons, \$33M*
- Wells Fargo Home Mortgage - Milwaukee, WI

# TEAM QUALIFICATIONS / JCP Construction Resume

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## **ANDY BORK** *Project Engineer*

Andy is responsible for assisting project managers and superintendents in coordinating and expediting the flow of information; ensuring cost, schedule, document control, and quality standards are met. Because of his background in both the design and construction process, his unique perspective allows him to foresee impacts multiple steps in advance. He is closely involved in the construction process from field support to procurement and change management of project.

Andy has over five years of experience in the construction industry, and five years of experience in design. He holds a Bachelor of Science degree in Civil Engineering from the University of Wisconsin-Madison. Throughout his construction career, he has held various positions including cost estimator, project engineer, and civil site coordinator. His experience includes involvement on several notable projects ranging from commercial and healthcare, to complex road projects in excess of \$1 billion.

### **EDUCATION/ACCREDITATIONS:**

- B.S. Civil and Environmental Engineering - University of Wisconsin-Madison
- OSHA 30-hour Training Program

### **RELEVANT EXPERIENCE:**

- Komatsu South Harbor Headquarters - Milwaukee, WI  
*Multi-use office and manufacturing global headquarters*
- Advocate Aurora St. Francis - St. Francis, WI  
*Health clinic renovation, \$1.4M*
- S.C. Johnson - Racine, WI  
*West campus renovation, \$80M*
- Capitol Drive Reconstruction - Pewaukee, WI  
*1.5-mile road reconstruction, \$8.5M*
- Zoo Interchange - Milwaukee, WI  
*Complete interchange redesign and reconstruction, \$1.2B*

# TEAM QUALIFICATIONS / JCP Construction Resume

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## **JEFF HUBBELL** *Senior Project Manager*

As a senior project manager, Jeff has over 21 years of experience in government/military, healthcare, education, and industrial construction. Jeff is responsible for managing healthcare and education projects from the JCP office with an eye on budget, scheduling, subcontractor, and JCP self-performance management as well as quality and safety.

Jeff possesses excellent construction management skills, including managing subcontractors, working with project owners, architects/engineers, and subcontractors to ensure projects meet deadlines and are completed within budget. Additional experience includes understanding life safety and infection control parameters for the healthcare industry.

Jeff has extensive experience as a project manager and applies this knowledge in ensuring the satisfaction of project owners is met or exceeded. As a senior project manager, Jeff oversees projects from \$150,000 to over \$10M

### **EDUCATION/ACCREDITATIONS:**

- Bachelor's Degree
- OSHA 30-hour Training Program
- USACE QC Management for Contractors

### **RELEVANT EXPERIENCE:**

- MPS OASIS Renovation - Milwaukee, WI
- Advocate Aurora St. Francis Clinic Renovation - Milwaukee, WI
- Advocate Aurora Finish Carpentry - Sheboygan, WI
- SSM Health - Madison, WI  
*Doors, frames, and hardware, \$1.1M*
- Kikkoman Foods Shikomi Utility Addition - Walworth, WI  
*Structure, enclosure, and mechanical, \$2.6M*
- 1420 Wright Street Armory - Madison, WI  
*Addition and renovation, \$2.5M*
- Civil Support Team Addition - Madison, WI  
*Enclosure and addition, \$2.5M*
- Veterans Memorial Cemetery Improvements - King, WI  
*New construction, civil and site improvements, \$3.5M*
- Sterile Processing Facility - Milwaukee, WI  
*Existing building repurpose, \$10M*

# TEAM QUALIFICATIONS / JCP Construction Resume

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## **TRACY CARSON** *Assistant Project Manager*

Tracy joined the JCP construction team in 2017. She is responsible for assisting project managers and superintendents in coordinating and expediting the flow of information; ensuring cost, schedule, document control, and quality standards are met. Because of her attention to detail, she is closely involved in the construction process from field support to procurement and management of project through use of the Procore management system.

Tracy has nearly 30 years of experience in the construction industry. She holds a Bachelor of Science degree in Architectural Engineering and an Associate Degree in Business Management from the Milwaukee School of Engineering. Throughout her construction career, she has held various positions including cost estimator, marketing coordinator, project engineer, and assistant project manager. Her experience includes involvement on several notable projects ranging from commercial and healthcare, to complex office projects in excess of \$450M.

### **EDUCATION/ACCREDITATIONS:**

- Graduate Studies - Marquette University
- B.A. Architectural Engineering A. A. Business Management - Milwaukee School of Engineering (MSOE)
- OSHA 30-hour Training Program
- AGC Supervisor's Training Program
- Dale Carnegie Leadership Training
- National Technical Association/  
National Society of Black Engineers (NTA/NSBE)

### **RELEVANT EXPERIENCE:**

- Bader Philanthropies Headquarters - Milwaukee, WI  
*Multi-use corporate office global headquarters, \$7M*
- Milwaukee Bucks Arena - Milwaukee, WI  
*Prime site concrete and security, as well as framing, railings, and millwork packages, \$6.7M*
- Northwestern Mutual Insurance - Milwaukee, WI  
*Tower and Commons project, 32-story high rise office and corporate headquarters, \$450M*
- VA Spinal Cord Injury Disorder Center - Milwaukee, WI  
*38-bed hospital facility, \$27.5M*
- Racine County Law Enforcement Center - Racine, WI  
*Renovation and new construction, \$20M*
- Potawatomi Bingo Casino - Milwaukee, WI  
*Parking garage and casino expansion, \$180M*



# TEAM QUALIFICATIONS / JP Cullen Resume



JP CULLEN FORTH & FIFTH GENERATION OWNERS

JP Cullen is a fifth-generation family-owned union Construction Manager and General Contractor. Since 1892, we have taken on the most challenging government, education, healthcare, commerce, industrial, arts & entertainment and historic restoration projects across Wisconsin, Illinois, and Iowa. Today we are a \$400 million full-service pre-construction and construction company managing projects from \$1,000 to over \$80 million in size. We pride ourselves on our award-winning projects, such as the Milwaukee Bucks Training Center and Arena, Camp Randall Stadium, Epic Headquarters, and renovations of the Wisconsin State Capitol.

JP Cullen employs one of the largest union workforces in the region. Since 2015, we have paid over \$223,000,000 in union wages and fringes. JP Cullen is signatory to the following trade unions: Bricklayers, Laborers, Iron Workers, Operators, Millwrights, Cement Masons, Cement Finishers, and Carpenters. The unions and JP Cullen work closely to develop workers in the construction industry. Since 2018 and in partnership with local union trades, we have employed 92 apprentices as well as 10 youth apprentices. The proud partnership between JP Cullen and the local unions dates back to the formation of our company in 1892.

**OUR MISSION IS TO IDENTIFY, HIRE, TRAIN AND RETAIN THE BEST PEOPLE TO SERVE OUR CUSTOMERS.**

# TEAM QUALIFICATIONS / JP Cullen Resume

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## **JEANNIE CULLEN SCHULTZ, LEED AP BD+C**

### *Project Leader & JP Cullen Co-President*

Jeannie is a 5th generation family business owner of JP Cullen and serves as the company's Co-President. She is an active member of her community both professionally and personally. Jeannie serves on several nonprofit and local organization boards and steering committees across Dane County. One of her biggest passions is encouraging women to pursue careers in construction.

#### **RELEVANT EXPERIENCE:**

- VA Soldiers Home - Milwaukee, WI  
*Preserved and rehabilitated six vacant buildings into 101 supportive housing units for veterans and their families who are homeless or at risk of becoming homeless.*
- Baker Tilly Corporate Headquarters - Madison, WI  
*Working with Livesy group, a new four-story headquarters office building was built for anchor tenant, Baker Tilly, in the American Center Business Park.*
- Epic - Verona, WI  
*Over 60% of the Epic Campus has been built by JP Cullen including office buildings, training centers, auditoriums, utility buildings, and parking structures.*

#### **EDUCATION/ACCREDITATIONS:**

- B.S. Psychology - Dartmouth College
- M.S. Educational Leadership & Construction Management - University of Wisconsin-Madison



## **TIM JORDAN**

### *Project Manager*

Tim is responsible for construction management of your project. He will be in communication daily with the entire team, monitor schedule and budget, and will be a part of the safety team. Tim brings more than 22 years of experience to the project.

#### **RELEVANT EXPERIENCE:**

- Camp Randall Student Athlete Performance Center - Madison, WI  
*Camp Randall got a 56,000 sq. ft. addition to the north end zone, a new tunnel to the stadium floor for the football team, a new scoreboard, and the artificial turf was replaced.*
- The Wisconsin State Capitol - Madison, WI  
*A 13-year partnership restoring the Capitol, starting with the north wing and continuing counter-clockwise through each wing, then to the dome, rotunda, grand stairs, and outside grounds.*
- Milwaukee City Hall - Milwaukee, WI  
*Repair work includes the rebuilding of the clock tower, restoring exterior bricks, and designs.*

#### **EDUCATION/ACCREDITATIONS:**

- B.S. Construction Management - University of Wisconsin-Madison

# TEAM QUALIFICATIONS / JP Cullen Resume

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**CHAD NENNO**  
*Superintendent*

Chad, one of JP Cullen's most experienced experts with over 20 years of experience, will lead as the Superintendent on this project. He will be responsible for project supervision and daily job site management.

## RELEVANT EXPERIENCE:

- UW-Madison Meat Science & Muscle Biology Lab - Madison, WI  
*A new state-of-the-art research laboratory for the UW-Madison to be used by students, professors, researchers, and food and meat processing companies.*
- Camp Randall Student Athlete Performance Center - Madison, WI  
*Camp Randall got a 56,000 sq. ft. addition to the north end zone, a new tunnel to the stadium floor for the football team, a new scoreboard, and the artificial turf was replaced.*
- Epic - Verona, WI  
*Over 60% of the Epic Campus has been built by JP Cullen including office buildings, training centers, auditoriums, utility buildings, and parking structures.*

## EDUCATION/ACCREDITATIONS:

- B.S. Construction Management - University of Wisconsin-Stout
- Carpentry Apprenticeship - Blackhawk Technical College



**SAMANTHA POTTS**  
*Preconstruction Estimator*

Samantha will gather, calculate, and compile data for use in conceptual/bid proposal estimates, and in preparation of routine estimates. Samantha will seek out subcontractor involvement to ensure a complete project price is developed.

## RELEVANT EXPERIENCE:

- Camp Randall South End Zone Renovation - Madison, WI  
*UW-Athletics is renovating the South End Zone of Camp Randall Stadium to include new premium seating sections.*
- UW-Madison Meat Science & Muscle Biology Lab - Madison, WI  
*A new state-of-the-art research laboratory for the UW-Madison to be used by students, professors, researchers, and food and meat processing companies.*
- Camp Randall Student Athlete Performance Center - Madison, WI  
*Camp Randall got a 56,000 sq. ft. addition to the north end zone, a new tunnel to the stadium floor for the football team, a new scoreboard, and the artificial turf was replaced.*

## EDUCATION/ACCREDITATIONS:

- B.S. Civil and Environmental Engineering - University of Wisconsin-Madison



# TEAM QUALIFICATIONS / Saiki Design, OTIE & JSD Resumes

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Saiki Design is an award winning, specialty landscape architecture firm. Organized in 1989, the company provides services to both public and private clientele with project locations throughout the State of Wisconsin and the Upper Midwest.

The creation of high quality spaces is central to their practice. Their work spans multiple sectors and their team has delivered high-quality design services for public, private, and joint-venture clients.

Saiki Design built work can be found in botanical gardens, retail development, corporate campuses, university campuses, mixed use, and residential developments. They pride themselves on the ability to work from the master plan scale down to the detailed design, where the personal experience of a space and its surroundings comes to life.

Saiki treats all of their projects as unique challenges. They do not apply previously developed solutions, although they lean heavily upon the collective wisdom and experience of their staff, collaborators and clients. They are an office with over 100 years of combined staff experience; the team is comprised of licensed landscape architects, LEED accredited professionals, landscape designers with degrees in landscape architecture, master gardeners, and student interns.

They know that they are practicing in a world that is changing. Therefore, their team is committed to continued learning and teaching and their staff regularly attend local and national conferences and workshops. Saiki Design is a Certified Minority Business Enterprise (MBE), and is committed to equal employment opportunities for all individuals.



Oneida Total Integrated Enterprises (OTIE) is a Native-American business, owned by the Oneida Nation of Wisconsin. They have grown into an integrated, multi-disciplined firm of qualified, experienced, and professional engineers. OTIE is a registered Minority Business Enterprise (MBE) with the Wisconsin Department of Administration and Targeted Business Enterprise (TBE) with Milwaukee County.

OTIE offers structural engineering to cost-effectively tackle a diverse range of projects with emphasis on practicality and a commitment to detail. Their experience and creativity is coupled with a complete understanding of your goals, to create design solutions optimized to fit your needs. The structural engineering design team works closely with architects and owners in an integrated manner to completely understand your project goals and make your vision a reality. They are very familiar with all methods of project delivery and have proven success working creatively and pro-actively with fast track, phased, design-build, and other customized project delivery methods.



Established in 1998 JSD Professional Services, Inc. strategically serves local, regional, and national clients. JSD's civil engineers, surveyors, and planners are all focused on delivering exceptional services from project concept through ribbon cutting. Their team of specialists have a broad knowledge base in creative design, site evaluation,

municipal entitlements, land survey documentation, and site infrastructure. JSD believes effective communication and their commitment to service are the foundations of project success. They are responsible for their clients' ever-changing needs and have proudly built a reputation with clients for more than 20 years.



# TEAM QUALIFICATIONS / Saiki Design Resume

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## **KEN SAIKI, PLA** *Landscape Architect*

Ken Saiki is a principal and founder of Saiki Design, Landscape Architects, of Madison, Wisconsin. The firm, established in 1989, is the recipient of numerous design awards, both nationally and on a state-wide basis. In addition to his work at his firm, Ken has lectured at the University of Wisconsin-Madison for the Departments of Landscape Architecture and Urban and Regional Planning. He has served on the City of Madison's Zoning Ordinance Re-write Advisory Committee, the Lisa Link Park Advisory Committee, and the Urban Design Commission. He is a Past President of the Wisconsin Chapter of the American Society of Landscape Architects. Ken excels at place-based design solutions grounded in extensive stakeholder and community engagement.

### **EDUCATION/ACCREDITATIONS:**

- Bachelor of Science, Landscape Architecture - University of Wisconsin-Madison
- Licensed Landscape Architect in Wisconsin
- Project Review Committee, The American Center - Madison, WI

### **RELEVANT EXPERIENCE:**

- Judge Doyle Square Redevelopment - Madison, WI
- The Breese Apartments Site and Rooftop Gardens - Madison, WI
- The Lyric Apartments Site and Rooftop Terraces - Madison, WI
- Fair Oaks Apartments - Madison, WI
- James Madison Park Master Plan - Madison, WI
- Olin Building Renovation - Madison, WI
- The Edgewater Hotel Rooftop Plaza and Site Design - Madison, WI
- Madison Public Market Site and Landscape Design - Madison, WI
- Ho Chunk Gaming, Madison Campus Redevelopment and Expansion - Madison, WI
- Vel R. Phillips Streetcar Plaza Site Design - Milwaukee, WI
- Lark at Kohl Site and Rooftop Terraces Design - Madison, WI
- Community Space Concept Design - Brown Deer, WI
- Allen Centennial Gardens Master Plan - Madison, WI
- Olbrich Gardens Education Center and Greenhouse Additions - Madison, WI
- American Players Theatre, "Up the Hill" Site Renovation - Spring Green, WI

# TEAM QUALIFICATIONS / Saiki Design Resume

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## **ABBIE MOILIEN PLA, ASLA** *Landscape Architect*

Abbie Moilien is a principal and vice president of Saiki Design. She is a licensed landscape architect and certified master gardener with experience in master planning, site-scale planning and design, green roof design, detailed design, and construction administration. Abbie has designed and managed several significant public and private projects, most notably the Bee Branch Creek Restoration, UW Health at the American Center site and green roof, and the Gardens of St. Mary's Hospital. Abbie is skilled at listening closely to clients and stakeholders and translates her understanding of design and material selection into elegant and award-winning projects. She is especially enthusiastic about therapeutic landscapes and nature-based play spaces for all ages.

### EDUCATION/ACCREDITATIONS:

- Bachelor of Science, Landscape Architecture, Certificate of Environmental Studies - University of Wisconsin-Madison
- Wisconsin Landscape Architect: 673-14
- Master Gardener Certification

### RELEVANT EXPERIENCE:

- Madison Youth Arts Center Green Roof and Site Design - Madison, WI
- Lyric, Phase III Green Roof and Site Design - Madison, WI
- Olin Park Building Expansion and Renovation - Madison, WI
- Madison Children's Museum Green Roof Design - Madison, WI
- Comiskey Park Master Planning and Design - Dubuque, IA
- Bee Branch Creek Restoration Master Plan - Dubuque, IA
- 722 Williamson Street Site, Green Roof and Planting Design - Madison, WI
- 1603 Monroe Street Site, Green Roof and Planting Design - Madison, WI
- UW-Eau Claire Science & Health Science Building - Eau Claire, WI
- Mercyhealth Cherry Valley Clinic Site and Planting Design - Rockford, IL

# TEAM QUALIFICATIONS / OTIE Resume

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**PAUL KAROW, PE**  
*Structural Engineer*

Paul has over 30 years of experience in structural design and construction. He has conducted projects from conceptual design to cost-estimation, from detailed construction documents and bidding and through full construction administration, including shop drawing review, site observation, and field resolution. Paul brings strong technical skills, combined with his personal and collaborative skills, to projects to provide clients with an integrated and successful project and an enjoyable consultant experience. Paul has been responsible for structural design of a wide variety of projects such as mixed use, performing arts, residential, commercial, office, industrial, civic, sports, retail, and parking facilities.

A strong background in all types of structural systems is Paul's stock-in-trade. He has completed numerous projects using structural steel systems in conventional design; composite steel/concrete framing and open-web joists and girders; and one-way, two-way, and post-tensioned cast-in-place concrete structures. Paul has also integrated other structural systems design into his projects such as concrete masonry, wood/timber framing, cold-formed steel; and lateral bracing systems using moment frames, braced frames, and shear walls.

## EDUCATION/ACCREDITATIONS:

- BS, Civil/Environmental engineering with Structural Concentration - University of Wisconsin-Madison
- Professional Engineer: WI
- American Institute of Steel Construction
- Industry Mentor, University of Wisconsin-Madison: Civil Engineering Capstone Project, 2006-present

## RELEVANT EXPERIENCE:

- Williams Fieldhouse Addition Phase II, UW-Platteville, State of Wisconsin Division of Facilities Development (DFD) - Platteville, WI
- Lubar Center for Entrepreneurship and Welcome Center, UW-Milwaukee, DFD - Milwaukee, WI
- Wisconsin Energy Institute - Madison, WI
- School of Human Ecology Renovation and Expansion, UW-Madison, DFD - Madison, WI
- Student Recreation & Wellness Center, UW-Oshkosh, DFD - Oshkosh, WI
- Wisconsin Veterinary/Diagnostic Laboratory, DFD - Madison, WI
- Edgewood College "The Stream" Visual and Technological Arts Center - Madison, WI
- Rothwell Student Center, UW-Superior, DFD - Superior, WI
- Centennial Hall Academic Building, UW-La Crosse, DFD - La Crosse, WI
- Technological Arts Center - Madison, WI
- Electronic Theater Controls, Corporate Headquarters - Middleton, WI
- Sundance Theater Interface Requirements at Hilldale Mall - Madison, WI

# TEAM QUALIFICATIONS / OTIE Resume

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**JAMES HALL, PE, SE**  
*Structural Engineer*

James is a structural engineer with more than 20 years of experience in engineering design. His experience includes conceptual and detailed design, cost estimating, preparation of specifications and construction drawings. He brings strong project coordination skills and has served as project manager and construction administrator on many projects. He has been responsible for the structural design of performing arts, commercial office buildings, and educational facilities nationwide. This has provided him with the knowledge of the primary building codes, high snow load regions, high wind regions, seismic, and experience with construction techniques regarding specific regional factors.

He has a solid background in structural steel framing, composite floor systems, built-up plate girders, concrete structures (both mild reinforced and post-tensioned concrete), concrete masonry units (CMU), precast concrete, deep foundations (piles and caissons) with grade beam systems, spread footing foundations, large earth retaining systems, post-tension slab-on-grade, timber framing and lateral systems such as moments frames, braced frames, and shear walls.

## EDUCATION/ACCREDITATIONS:

- BS, Civil Engineering - University of Nevada
- Professional Engineer: WI (#36292), IA (#21027), MN (#51586)
- Structural Engineer: IL (#081.006115)

## RELEVANT EXPERIENCE:

- Northwest Quadrant Renovations, UW-Milwaukee, DFD - Milwaukee, WI
- University Square, Mixed-use Development, UW-Madison, DFD - Madison, WI
- City Hall Expansion - Ripon, WI
- First United Methodist Church Expansion - Madison, WI



# TEAM QUALIFICATIONS / JSD Resume

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**HANS JUSTESON, PE, PLS**  
*Principal Civil Engineer*

Hans holds a Bachelor of Science in Civil Engineering and is registered as a Professional Engineer and Land Surveyor. He has over 22 years of experience as a professional engineer with expertise in commercial, institutional, industrial, and residential development, utility design, stormwater management, platting, construction administration, site surveying, and hydrographic surveying. His professional experience includes significant work in the area of commercial/retail development, residential development, and a large variety of municipal projects.

## EDUCATION/ACCREDITATIONS:

- Bachelor of Science, Civil Engineering  
- University of Wisconsin-Madison
- Professional Land Surveyor, WI
- Professional Engineer, WI
- American Congress on Surveying  
and Mapping (ACSM)
- Madison Area Surveyors Council  
(MASC)
- Wisconsin Land Information  
Association (WLIA)
- Wisconsin Society of Land Surveyors  
(WSLS)

## RELEVANT EXPERIENCE:

- Madison Yards Development - Madison, WI
- City of Madison Fire Stations #4, #5, and #12 - Madison, WI
- City of Madison Parking Utility, Government East Parking Garage Condition Evaluation - Madison, WI
- Novation Campus - Madison, WI
- Door Creek North, Phase II, for City of Madison Engineering Department - Madison, WI
- Dane County Public Works, Alliant Energy Center, Livestock & Exhibition Space - Madison, WI
- Dane County Capitol Square South Parking Ramp - Madison, WI
- Dane County Sheriff's Southeast Precinct - Stoughton, WI
- Dane County Badger Prairie Health Care Center - Verona, WI
- Fitchburg Center GMP Facility - Fitchburg, WI
- Juneau County Health & Human Services - Mauston, WI
- Verona Public Works Facility - Verona, WI
- Village of Oregon, Master Plan for Keller Alpine Meadows Park - Oregon, WI

# TEAM QUALIFICATIONS / JSD Resume

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**MATTHEW HAASE, PE**  
*Civil Engineer*

Matthew has over seven years of design and construction experience on a multitude of projects. As a project engineer, he has experience in designing commercial, industrial, institutional, recreational, and residential sites from initial conception through construction documents. His role also includes coordination of design and development teams, utilities, municipal and regulatory entitlement, and permitting processes as well as managing project scope, budget, and timelines. Matthew also has valuable field experience on construction projects including observation, administrative, and field engineering responsibilities with multifaceted private development projects as well as public sector projects with WisDOT and local municipal projects.

## EDUCATION/ACCREDITATIONS:

- Bachelor of Science, Civil Engineering  
- University of Wisconsin-Platteville
- Professional Engineer, WI

## RELEVANT EXPERIENCE:

- Madison Yards - Madison, WI
- Novation Campus - Madison, WI
- American Transmission Company, Site, Stormwater & Utility Design - Dane County, WI
- Certco Inc, Warehouse Building, Civil & Stormwater Management Design - Dane County, WI
- Certco Maintenance Facility - Fitchburg, WI
- Shady Grove Subdivision Design, Lift Station & Stormwater Management - Dane County, WI
- Urban Site Commercial/Retail Multi-use Building, Stormwater & Utility Design - Dane County, WI
- Verona Area Schools Existing Campus, Redevelopment - Verona, WI
- MAYSA Reddan Soccer Park, Soccer Complex Designs - Verona, WI
- Driftless Ridge Rural Condominium Development Design & Const. Admin - Verona, WI
- Oregon School District - Oregon, WI
- Aspen Meadow Estates Rural Subdivision Design & Const. Admin. - Middleton, WI

# TEAM QUALIFICATIONS / JSD Resume

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**TODD BUHR, PLS**  
*Director of Surveying*

Todd manages JSD survey operations for all regional locations. His duties include performing and coordinating survey project workload between offices, staffing, QA/QC, department, and capital improvement budgets and company standards. Todd is the liaison between engineering and surveying staff, facilitating standards meetings to identify and resolve issues as a team effort. Todd has over 30 years of land survey coordination, project management and staff management experience in the public and private sector. Todd's background using LEAN manufacturing principles has made JSD's surveying operations efficient and cost effective in the market. His expertise is in managing and performing land surveying tasks on transportation project plats, right-of-way plats, large utility corridor projects with major private utility companies, airport surveys, stadium projects, private development, railroad surveys, condominiums, subdivisions, municipal projects, and construction observation projects. His diverse background includes working for both small and medium sized engineering/land surveying firms and a large public utility company.

## EDUCATION/ACCREDITATIONS:

- AD Civil Engineering - Northeast Wisconsin Technical College
- Professional Land Surveyor: WI #2614
- USA Team Member vs. China at Sino American International Surveying Competition, Washington DC
- Member, Wisconsin Society of Land Surveyors
- Vice President, Madison Area Surveyors Council

## RELEVANT EXPERIENCE:

- Madison Yards Development - Madison, WI
- Dane County Public Works, Alliant Energy Center, Livestock & Exhibition Space - Madison, WI
- GEF2 - GEF3 Public Plaza Renovations - Madison, WI
- UW-Madison Alumni Center - Madison, WI
- UW-Madison School of Music - Madison, WI
- UW-Madison Chemistry Building - Madison, WI
- Madison College Goodman Sports Complex - Madison, WI
- Madison College Southwest Plaza Addition - Madison, WI
- Madison College Truax Campus East Lot - Madison, WI
- Edgewood College - Madison, WI
- UW-Whitewater Chiller Plant - Whitewater, WI
- MAYSA, Reddan Soccer Park - Verona, WI

# TEAM QUALIFICATIONS / Workforce Equity & Diversity

The Alexander Team is committed to building an inclusive workforce welcoming to people of all backgrounds. This commitment is woven into our broader mission and values which believe that our people are our greatest assets. It is important for us to represent the communities we are building for. Our Diversity & Inclusion program is centered around mentoring, teaching, and guiding the subcontractor firms in our communities.



JP Cullen proactively seeks to do business with diverse suppliers. Their program has resulted in exceeding their inclusivity goals on over 20 recent projects and \$24 million paid to diverse firms in the last five years alone. They participate in community job fairs and partner with firms such as Big Step, Prism Technical, Cross Management, and community leaders to ensure they're reaching as many individuals as possible. One of their most recent successes was at the Milwaukee Bucks Training Center. Their goals were: 25% minority firm participation, 25% Milwaukee County residents participation, and 15% apprentice participation. Each of these goals was exceeded with 28% minority firm participation, 28.8% Milwaukee County residents participation, and 22.1% apprentice participation. These efforts were recognized when WRTD/BIG STEP awarded JP Cullen the 2017 Employer Project Partnership Award for their commitment to build a more diverse, qualified workforce in construction, as well as the 2018 Diversity Award from Froedtert Health.



JCP Construction believes in employing local residents to help build and sustain their dedicated and diverse workforce. As a minority-owned business, they see it as a priority to ensure all the construction projects they lead are assisted by businesses with similar, forward-thinking mindsets that support the advancement and success of all nationalities, cultures, races, and genders. JCP Construction has tremendous respect for the local workforce and are proud to actively recruit from within as they continue to grow and thrive.



DIVERSE SPENDING DOLLARS DURING THE PAST FIVE YEARS (SUBCONTRACTORS + JCP CONSTRUCTION)



TOTAL SPENT ON CONTRACTS DURING THE PAST FIVE YEARS WHEN SERVING AS LEAD CONSTRUCTION MANAGER



DIVERSE SPENDING DOLLARS DURING THE PAST FIVE YEARS (SUBCONTRACTORS)



# PROJECT UNDERSTANDING AND APPROACH

## Introduction & Statement of Understanding

The Alexander Team will collaborate with the CDA and identified stakeholders in providing master planning services, assist city staff in leading a robust public and resident engagement process, and the development and implementation strategy for the completion of the Triangle redevelopment objectives.

Many of the key components of the specific project approach require an in-depth technical knowledge of building types, sustainable building design, infrastructure needs and cost considerations. The Alexander Team is well-equipped to address these technical issues, as we have done so in many neighborhoods, streets, sites, and buildings throughout Wisconsin and beyond. More importantly, the Alexander Team is also highly qualified to engage in the crucial task of listening and designing to meet the person-centered needs, challenges, and visions of community residents.

## Community Engagement

The Triangle neighborhood is a community with a rich and diverse history and culture. Our community engagement process will be designed to create a safe and energized context and place for the residents and stakeholders to fully express and share their authentic selves – their needs, their challenges, and their dreams for their community. This will lay the groundwork for a design that contributes significantly to the overall well-being of the community by advancing equity and social justice through the provision of robust and adaptable housing and urban infrastructure with an approach rooted in the City of Madison’s RESJI mission.

**EQUITY:** The residents in the CDA-owned units at the Triangle consist of seniors and younger adults, most of whom have identified physical and/or mental challenges. Nearly half are people of color, many with economic resource barriers. We need to make sure we are engaging with the whole community and that there is equity in all forms of communication, creating pathways to equal access and expression. We will design an inclusive process collaborating with the community, the CDA, and the stakeholders to provide a diverse and adaptable plan spanning generations. While taking into consideration cognitive challenges, assistance needs, language and cultural diversity and potential lack of internet access, the process will create shared ownership. Communications to the community needs to be ongoing, informative, and engaging.

**ACCESS:** Since a key goal of the redevelopment is to reduce social isolation, we will kick off the community engagement process by meeting the residents where they are – by hosting social events that will draw them in and inspire them to visually, verbally, and physically to communicate their needs, challenges, and dreams. This ongoing dialogue will be thoughtfully planned to be culturally sensitive and relevant to this diverse population.

**TRUST:** Marginalized communities maintain a level of trust (or mistrust) based on their life experiences: experiences that contribute to a heightened awareness of historical failures of similar projects. The Alexander Team will engage the community as an equal partner, approaching with sensitivity and empathy in order to earn trust. Our methodology involves open communication, ongoing action, and active listening to carefully consider all of what makes them citizens with value.

**EMPATHY:** The voices of the people in this community are what is most important, and therefore the basis of our strategy. Our team brings a skillset in the areas of planning, design, and construction, that will respond to the community’s needs, ideas and dreams. Community engagement is inherently a process of utilizing skillsets empathetically to elevate the voices of the people, therefore providing the foundation of support for the successful future of the Triangle neighborhood.

## Listen/Discover/Design

All our efforts will involve Strang’s tried and true “Listen, Discover, Design” methodology that has been used successfully for all our projects for decades. This was used in Strang’s outreach efforts with Village on Park to yield highly successful planning results.

**LISTEN.** We take the time to really listen as our first step. What is your vision? What are your growth and space needs projections? How can we best illustrate your values in your places, landscaping, signage, buildings, and community access? We want to hear you weigh in on these questions. Most importantly, we want to clarify your objectives.

**DISCOVER.** After listening, we collect, review, and analyze your input and the existing conditions of your community and facilities. This analysis facilitates discovery of unique opportunities inherent to you and your project. By drilling down and challenging assumptions, we discover what your true needs and values are and use them for design.

**DESIGN.** Our team won’t be designing anything until we have completed the first two steps in our methodology. The Listen and Discover phases inform Design. As we steward your vision, you are engaged as co-creators resulting in a design that perfectly fits your vision, budget, and schedule.

## Community Engagement Toolbox

**VISIONING:** In this highly interactive forum, we use images and stories to explore new ideas. “Visioning” explores new concepts of how you live, function and flourish as a community, what values you hold, how you live out your vision, and ideas for change. We explore things you are most proud of, hopeful for, and most concerned about. The tangible result is to build consensus and establish your drivers of success.

**DESIGN CHARRETTE:** A charrette is a hands-on session that brings together the community and the design team to collaborate together, creating ideas and possible solutions through words, Post-Its and sketches. We test them to see if they will fit within budget and schedule parameters. You and your stakeholders provide hands-on instant feedback, which keeps things moving forward. This process allows for momentum and excitement to build as consensus emerges in the form of a conceptual design that reflects the collective vision.

### THE *Engagement* Toolbox

#### LISTENING

- Public meetings
- Open houses
- Question and answer sessions
- Charrettes and workshops
- Diversity, Equity & Inclusion

#### ANALYZING

- Mapping
- Demographics research
- Community polling
- Interactive community history
- Expert Interviews

#### ACTIVATING

- Community meals
- Informal events (e.g. movie night)
- “Walk and Talk” the Triangle
- Provisional activation
- Leveraging connections

#### STORY TELLING

- Open-mic night
- Public displays and exhibits
- Print & online content
- Community presentations
- Case study presentations
- Cultural celebrations

#### MAKING

- Tactical urbanism
- Placemaking
- Physical polling
- Community maker event
- Community art & culture event

### VILLAGE ON PARK MASTER PLAN AND REDEVELOPMENT

Strang has been collaborating with the City of Madison to strategically transform an aging strip mall into a vibrant community asset, a catalyst for the revitalization of the challenged South Park neighborhood. Today, the Village stands as a shining testament of a municipality’s ability to shape urban context for the betterment of all.

This is a story of collaboration between city and community, public and private involving the engagement of the entire community of diverse ethnicities, cultures and age groups. Multiple on-site visioning sessions and workshops helped align neighborhood goals with user groups and stakeholders that would occupy the site.

This project involved a “Peace Mural” for the project’s atrium, creating community connections via the arts, involving the children’s creativity and reflecting the diversity and pride in the neighborhood through a lasting community art piece for all to enjoy. Renovating an existing building instead of tearing it down to re-build, was consistent with the city’s sustainable goals.

The collaboration continues today, as we are currently updating the master plan to include a Black Owned Business Hub, a parking structure, affordable housing and the creation of a vibrant pedestrian oriented “Town Square” with a landscaped areas and plaza spaces with trellises.



## PROJECT APPROACH

Availability & Basic Schedule

Each identified partner is local, available, and stands ready to commit their talent and energy to the Triangle Redevelopment immediately upon award of a contract by CDA. The CDA will have a team of partners that will lead them through this entire process, from outreach to concept to implementation to management, with experts providing ideas, advice, and guidance at every step.

With respect to the identified three phases - 1: Vision and Master Plan, 2: Financial Plan, and 3: Implementation - the Alexander Team believes it is imperative that the three phases have overlap and run simultaneously rather than sequentially to ensure the success of this project. The Alexander Team purposefully combines community engagement, finance, construction, design, and management from beginning to end of each project. This is done to ensure what was designed can be built within budget, that it is designed and built to operate efficiently, that it will best serve its tenants and customers, and that it is structured in a way that can be financed and executed.

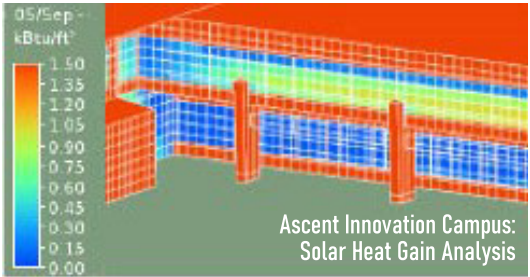
An integrated approach as described allows for our team to move forward faster than might otherwise be the case. As such, we anticipate the related subtasks under the three phases to take approximately 24 to 36 months, not including construction.

Energy Efficiency, Renewable Energy and Sustainable Building Design

Strang has always been passionate about integrating sustainable design solutions within their projects. Projects you may have heard of include American Family East Regional Building, Summit Headquarters, Dane County Job Center, Eurofins Food Solutions, Hamel Music Center, Agora at Fitchburg Center, National Guardian Life, Village on Park and Ho-Chunk Gaming Madison. Strang’s history involves some of the earliest energy recovery systems developed in the 1960’s. More recently, Strang’s new office in the Capitol East District of Madison received LEED Gold certification. In this space, Strang utilized a VRF mechanical system and specialized lighting controls to minimize energy usage. Strang was also the first business/project in Wisconsin to receive a WELL program designation and it was a gold level certification. Strang also received the first designated LEED certified laboratory/pharma-based project in Wisconsin. Their integrated design approach focuses on potential sustainable design elements and their value for every project. Their engineers work closely with the architectural team to evaluate potential sustainable solutions, costs, and benefits. Strang understands the value of the sustainable workshop sessions to rank and evaluate the various options.

Strang’s engineering team recognizes the various criteria that represent the City’s Net Zero carbon emissions 2030 goal and plans to implement this process in their design for the Triangle community. They believe in the program and support the importance of minimizing carbon emissions. As such, they incorporate renewable energy and sustainable designs into majority of their projects. Strang has done that themselves, by being part of a utility program to utilize wind power for their office. Additionally, they have integrated solar arrays into several building projects to reduce the dependence of that project upon carbon fuel sources.

As part of their energy modeling process, Strang evaluates the Energy Use Intensity to define energy targets for each project. This defines a project’s preliminary basis to achieve energy reduction or net zero standards. Strang’s engineering and energy modeling team evaluate how the architecture and site conditions will inform the potential design solutions for the engineering systems. They analyze the relationship between passive and active systems, including energy consumption. Other project areas to be evaluated include daylighting and integrated lighting design, right-sizing and controls from equipment, potential renewable energy resources, and how commissioning and maintenance play a role in effectively achieving 2030 standards.



Advancing Equity in Multi-family

Advancing equity in multi-family requires intentional engagement and community input, which leads to placemaking with equitable development principles at its core. Several of these principles are physical in nature, such as constructing unit sizes that match the sizes of low-income renter households. The trend in new market-rate multi-family developments has grown towards smaller unit sizes; however, studies show that low-income renter households may have disproportionately larger household sizes due to multi-generational living. Other principles are administrative in nature with respect to resident screening and establishing a high bar for marketing requirements to ensure low-income renters and renters of color have access. The Alexander Company has seen first-hand how housing can be the foundation for life improvement through their creation and management of over 3,000 units of affordable housing, including housing for homeless and at-risk veterans in addition to a partnership with the Salvation Army of Dane County for professional property management services for housing communities serving those struggling with homelessness.

The Alexander Company typically makes a deliberate effort to mix income groups as a fundamental part of a community’s financial and operating plans and has achieved great success in doing so. With elevated design standards, effective management, preventative maintenance, and an experienced in-house compliance team, the company has created mixed-income communities that serve as shining examples of success while also setting a precedent for the appropriate and responsible methods of multi-family development and management. A mixed-income community offers individuals and families a platform to achieve and sustain upward mobility. With various levels of incomes served, residents are able to move into the “next phase” of housing without uprooting their lives and incurring the expenses associated with moving. Residents benefit from affordable housing in an urban core - an area and lifestyle that they might not otherwise be able to afford and enjoy. With greater access to transportation and employment opportunities individuals and families thrive.

Financial & Legal Issues

Closing the financing transaction in a timely manner remains the most notable difficulty and concern with respect to financing challenges. With the inclusion of RAD/Section 18 blends and LIHTC this becomes a complicated deal, and any potential lenders will want ample time to complete a plan and cost review prior to closing and funding. Specifically, the application for LIHTC with the Wisconsin Housing and Economic Development Authority is a competitive process, whether we proceed with a 9% or 4% application. Syncing the timing of various funding streams - competitive and otherwise, will be critical, and is something the Alexander Team is adept at handling.

RAD resident training will be integral to ensuring a smooth rehabilitation process. The Alexander Team will approach the rehabilitation putting residents first and will work with the CDA to ensure residents are aware of their rights and the broader rehabilitation/relocation plan(s). Triangle residents represent a vulnerable population experiencing many challenges, and providing resident support throughout the conversion process must be a priority, especially for those potentially experiencing temporary relocation.

The Alexander Team has built a partnership of trusted advisers to help the CDA navigate the complexities of rehabilitation. The parties around the table are well-versed in RAD, LIHTC, and the transaction as a whole, affording the ability to reach closing faster, more smoothly, and with less potential value left on the table.

# EXPERIENCE



HUD Asset Repositioning Experience

The Alexander Team has extensive experience with PHAs and the rules and regulations promulgated by HUD that govern their operations and finances. The Alexander Team, including Baker Tilly, have served in various capacities from program manager to development consultant to financial advisor in areas such as developer evaluation and selection, relocation, demolition, disposition, funding applications, revitalization planning, asset management construction management, financial leveraging, and the Capital Fund Financing Program (CFFP). The team has experience with HUD mixed-use finance requirements and frequently consults with clients on the regulatory requirements of their major funding sources and housing programs.

Baker Tilly has played an integral part of the RAD program since its inception in 2012 and has assisted in the conversion of thousands of affordable housing units. The Alexander Team has experience assisting clients through each stage of the LIHTC, RAD, and HUD mixed finance processes. They evaluate existing facilities or proposed new development sites, prepare the preliminary development and operating budgets, apply for and obtain tax credits, structure and negotiate financing terms with public and private entities, investors, and other stakeholders. The Alexander Team’s specialists are experienced with obtaining many layers of financing and understand the complexity of compliance that comes with using mixed and tax credit financing. Specifically, Baker Tilly’s recent work with 13 different housing authorities across six states resulted in over 1,500 units of housing, \$257,100,000 in total project costs, and entailed 16 LIHTC allocation awards – both 4% and 9%.

The Alexander Team leverages their experience with obtaining many layers of financing and with understanding the complex layers of compliance that come with using them to:

- Evaluate RAD/Section 18 feasibility and perform financial modeling
- Complete the RAD program application/Section 18 application and manage HUD processing
- Identify, apply for, and obtain tax credits, tax-exempt bonds, and other financing sources, if necessary
- Structure and underwrite mixed-finance transactions
- Negotiate with equity investors and lenders

HUD Asset Repositioning Challenges

As a partnership with unmatched enthusiasm and experience for housing redevelopment, the Alexander Team has successfully navigated clients through all stages of each HUD repositioning program. Collectively and individually, the team is familiar with asset, phased, and full housing authority portfolio repositioning. Among the most challenging of prior HUD repositioning projects was at the asset level, as the RAD consultant for a 50-year-old property consisting of 200 units (“the Project”). The Public Housing Authority client (“the PHA”) was interested in a straight-subsidy conversion (no utilization of debt) to RAD PBV. However, the program, financing, and transaction paths changed several times between initial stages and RAD closing. Work is currently in progress on the substantial rehabilitation at the Project, with the repositioning and rehabilitation funded by over \$32 million in tax credit equity, a HUD-FHA loan, and various sources of soft funding from local agencies.

Like each of the Alexander Team’s projects, they conducted monthly progress meeting with the PHA. The effectiveness of each progress meeting was boosted by their team’s repositioning progress documents<sup>1</sup>. Regular email communication and adding calls/ meetings as needed made for solid communication between the internal team and client throughout repositioning. For three to four months, progress meetings may have felt repetitive for the PHA.

<sup>1</sup> Each client progress meeting is made more effective by the following repositioning progress documents: topic-specific agendas, timelines (summary and detail versions), and comprehensive checklists. While these documents align with HUD program requirements, they also track development milestones. In advance of each progress meeting, the client will receive a detailed agenda along with the latest timeline and checklist. Following the meeting, the Alexander Team uses thorough meeting notes to update the timelines and checklists. Meeting minutes and action items are circulated to the client and internal team.

HUD Asset Repositioning Challenges Continued

Upon review of the RAD Capital Needs Assessment (CNA) and e-Tool, the transactional path needed re-evaluation. The CNA identified deferred maintenance items along with a multitude of capital needs for completion over the 20-year reserve period. Even more significantly for the deal structure was the high cost associated with the identified capital items including HVAC systems, electrical wiring, plumbing, and some roof replacement.

The Alexander Team brainstormed ideas that related to every aspect of repositioning – and for the Project used in this example, what they could see was turning out to be a redevelopment and revitalization:

- What can be re-evaluated in the CNA?
- What are financing needs and options?
- What is the status of soft funding application rounds (e.g. tax credits, Federal Home Loan Bank, federal HOME and CDBG)?
- Are any environmental issues expected to have a cost associated?
- Will the opposite RAD conversion type offer more rental income?
- What benefits/challenges would another HUD repositioning program bring?

The project was 50 years old with more capital needs than anticipated by the PHA, so the Alexander Team literally went back to the drawing board with the design team. Since Fair Market Rents (FMRs) in the area were not high, the percentage increase in rental income through a Section 18 conversion would be minimal. The PHA was already administering RAD PBVs. Administratively and operationally, continuing with RAD PBV was the best program option. On-site demolition and new construction appeared to be a viable, but costly and time-consuming, redevelopment alternative.

The client and team determined the best option was a change in unit configuration. FHEO approved the request to re-configure two larger units into two two-bedroom units, as needed for the market. Also approved was the request for a de minimis reduction of two dwelling units, allowing for conversion of a duplex into a non-dwelling residence services space. None of these actions required new construction activities. The team’s feasibility analysis correctly determined that per-unit rehab needs would meet criteria for a HUD 221(d)(4) FHA loan.

Every design change impacted General Contract costs, the CNA e-Tool, and Plan and Cost Review, requiring updates to each. The Alexander Team consistently monitored the project management timeline, which tracked required HUD (RAD and Multifamily FHA) milestones along with development, tax credit, and soft funding deadlines that needed to be met on a parallel basis. It was challenging to align the requirements and schedules for each agency (and HUD program office), particularly amid design and budget changes. Understanding the impact of changes specific to certain requirements/schedules was imperative in managing the complete project timeline and achieving the Project’s successful repositioning.

This is an example of the return-on-investment value of a team who respects and trusts one another; one teammate may view a change as “minimal” while another teammate has information about the bigger picture implications. While the team and clients may choose to move forward, the internal team maintains trust and communication and the project timeline remains updated and reliable. The strong communication and active listening skills of The Alexander Team are advantageous to partnerships in every step of repositioning and redevelopment, from kick-off to Certificate of Occupancy.

HUD Section 3 Experience

The Alexander Company, JP Cullen, and JCP Construction all have experience in complying with HUD Section 3 requirements for resident employment and the use of local businesses. Most recently, The Alexander Company and JP Cullen complied with these requirements on Milwaukee Soldiers Home - a 101-unit supportive housing development in Milwaukee serving veterans who are homeless or at risk, in partnership with the Housing Authority of the City of Milwaukee.

The Alexander Team confirms that when there is a need for new hires on the Triangle redevelopment, JP Cullen and JCP Construction - and their subcontractors - will make every effort at their disposal to hire Section 3 businesses and residents to the greatest extent feasible. Steps the aforementioned contractors will take to do so follow the City of Madison Section 3 Guidebook:

- Notifying and sending bid notices to businesses listed in the Section 3 Business Enterprise Directory.
- Notifying community-based organizations of Section 3 contracting opportunities by sending an e-mail to cdbg@cityofmadison.com requesting that they pass the information along to interested businesses.
- Notifying and sending bid notices to Section 3 Certified Business Concerns listed on HUD’s website at hud.gov/Sec3Biz.
- Using the existing participation-increasing methods outlined below to include Section 3 businesses and residents.

All notifications of contracting opportunities will contain a statement signifying that Section 3 Business Concerns (low-income) may receive preferential status in contracting opportunities.

M/D/WBE Experience

The Alexander Team is pleased to share that three of the eight included development partners are certified disadvantaged business enterprises. Additionally, JP Cullen and JCP Construction have proven success in meeting or exceeding M/D/WBE participation goals as noted previously, and do so via several methods including but not limited to:

- Segmenting portions of the work for only diverse firms to bid on to maximize participation and inclusion.
- Engaging in a collaborative process with the trade unions to allow for non-union minority owned business to participate in the project to maximize participation.
- Developing an inclusion plan that lays out methodology, requirements, commitments, and timelines.
- Using stakeholder meetings to identify and notify prospective diverse firms, residents, and apprentices about the project, work categories, and requirements.
- Assisting in the certification process for any qualified diverse firms.
- Hosting pre-bid conferences for diverse firms to answer questions, assist in quantity verifications, and scope clarifications.
- Producing and distributing reports to all stakeholders that show current and forecast future participation.

The City of Madison has approved JP Cullen’s Affirmative Action Good Faith Efforts on projects that have had utilization goals. This included documenting and demonstrating their efforts to assure that M/D/WBEs were provided opportunities to participate on any given project and used whenever possible. Such steps included, but were not limited to: dividing total project requirements into smaller tasks/quantities, negotiating directly with M/D/WBEs, contracting M/D/WBEs to answer questions and provide information regarding the work to be performed.

A list of JP Cullen’s recent experience with inclusion of M/D/WBE on past projects in Madison is available upon request.

LIHTC Allocation Experience

Over the past ten years, The Alexander Company has completed projects across six states, ranging from smaller multi-family communities to master-planned developments, with cumulative project costs from that time frame in excess of \$700 million. Nearly every Alexander Company project has entailed an affordable housing component, and the company has been working with the LIHTC program since its inception in 1986. One of the thrusts of The Alexander Company has always been providing quality affordable housing in downtown cores, and areas most in need, offering housing to those who would not otherwise be able to afford a desirable downtown location. This is done not only for sustenance, but because it aligns with company values. The Alexander Company will work closely with the CDA to ensure the most competitive application possible for these credits, and to efficiently use city, county, state, federal, and non-profit housing resources to fill any funding gaps.

Examples of LIHTC Allocation Success

The most recent examples of Alexander Company success include a 4% LIHTC application and award for the 169-unit Artisan Village in Madison, a hybrid 4% and 9% LIHTC application and award for the 101-unit Soldiers Home in Milwaukee - which also entailed 101 project-based HUD-VASH vouchers, and a 9% LIHTC application and award for the 101-unit Paragon Mill in Providence, Rhode Island. Furthermore, over the past four years, Baker Tilly has consulted on 43 projects awarded either 9% or 4% tax credits in Wisconsin, working in all of the set-asides (general, non-profit, supportive housing, and preservation).

Leveraging Funding Opportunities

The Alexander Team has extensive experience in the creative use of public economic development tools to ensure a successful, quality project that meets the needs of the community as well as financial stakeholders. To date, The Alexander Team has used almost every economic development tool available, including but not limited to:

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| • State and Federal Low Income Housing Tax Credits        | • Economic Development Administration Grants |
| • State and Federal Historic Tax Credits                  | • RAD/Section 18 Blends                      |
| • New Markets Tax Credits                                 | • Tax-exempt Bonds                           |
| • Tax Credit Assistance Program (TCAP) Grants             | • HUD 221(d)(4)                              |
| • Tax Incremental Financing                               | • Brownfield Grants                          |
| • HOME  | • National Park Service Grants               |
| • Community Development Block Grants (CDBG) / Section 108 | • EPA Revolving Loan Funds                   |
| • Economic Development Initiative Grants                  | • Military Construction Funds                |
|   | • VASH Vouchers                              |
|   | • Project-based Vouchers                     |
|   | • Tenant Protection Vouchers                 |
|   | • Rental Assistance Demonstration (RAD)      |







**CRESCENT LOFTS**    DAVENPORT, IOWA

*Pioneering an abandoned warehouse district to create mixed-income housing in an urban core*

As stated by former Davenport Alderman Gene Meeker, before The Alexander Company’s involvement the Crescent Warehouse Historic District was a “total, total disgrace” and an unwelcome, unpleasant area that was to be avoided. Many were skeptical that downtown loft housing would succeed.

In spite of that, five historic, dilapidated buildings received new life under a \$42 million master planning effort, ultimately providing downtown Davenport with 255 mixed-income apartments. Throughout the development process, The Alexander Company attracted additional developers and set a precedent for the appropriate and responsible methods for creating and operating mixed-income communities. Former Mayor Bill Gluba gave special credit to The Alexander Company for spurring major efforts to renovate historic buildings into housing, entertainment, and employment uses.

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| <b>Types of housing provided:</b>  | <b>Funding sources:</b>   |
| <ul style="list-style-type: none"><li>Affordable housing serving 50%, 60% and 80% of Area Median Income levels</li><li>Market rate housing</li></ul> | <ul style="list-style-type: none"><li>CDBG</li><li>HOME</li><li>State and Federal LIHTC</li><li>State and Federal Historic Tax Credits</li><li>Brownfield Grant</li><li>Enterprise Zone Tax Credits</li></ul> |



**PRINTWORKS MILL**    GREENSBORO, NORTH CAROLINA

*Bringing much-needed affordable housing and economic development to a forgotten mill district*

Once one of the most innovative fabric-printing mills in the South, Printworks Mill had been reduced to a shell with flooded floors, broken windows, and a gaping roof exposing the interior to the elements. It was an eyesore for the neighborhood.

Community neighborhood groups hailed the rehabilitation as a “fantastic example of using a distressed asset and turning it around and making it a productive place for people to live,” and providing more affordable housing had been a priority for Greensboro city officials for some time.

Today, Printworks Mill is a thriving community hub providing 217 mixed-income apartments in addition to a wide variety of indoor and outdoor community spaces. 9,000 sq. ft. is available for neighborhood-serving retail space, and 80,000 sq. ft. for climate-controlled self-storage facilities.

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| <b>Types of housing provided:</b>   | <b>Funding sources:</b>   |
| <ul style="list-style-type: none"><li>Affordable housing serving 60% of Area Median Income levels</li><li>Market rate housing</li></ul> | <ul style="list-style-type: none"><li>State and Federal Historic Tax Credits</li><li>Federal LIHTC</li><li>Tax-exempt loan</li><li>Developer equity</li></ul> |



**NOVATION CAMPUS**    MADISON, WISCONSIN

*From brownfield to mixed-use, mixed-income, thriving community just south of Downtown Madison*

Located just off a major highway interchange, Novation Campus is a multi-phase, master-planned \$120M development incorporating over 62 acres of land with a planned 1,000,000 sq. ft. of commercial space, housing, and hospitality.

The inherent difficulty in developing the site was that it entailed urban infill on a former brownfield. Through creative financing and perseverance, The Alexander Company was able to begin development in this prime location that otherwise would have been left unused. Four housing communities are currently found on campus, offering 314 units of mixed-income housing and a variety of opportunities to suit personal preferences. Located just five minutes from downtown Madison, this prime location offers convenient access to public transportation, Madison’s network of bike paths, and employment opportunities on campus and the surrounding area.

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| <b>Types of housing provided:</b>  | <b>Funding sources:</b>   |
| <ul style="list-style-type: none"><li>Affordable housing serving 50%, 60%, 70% and 80% of Area Median Income levels</li><li>Market rate housing</li><li>Aged 55+ housing</li><li>Live/Work housing</li></ul> | <ul style="list-style-type: none"><li>HOME</li><li>Economic Development Administration Grant</li><li>State and Federal LIHTC</li><li>Brownfield Grant</li><li>New Markets Tax Credits</li><li>Tax Incremental Financing</li><li>Tax-exempt Bonds</li><li>Other soft financing</li></ul> |



**SOLDIERS HOME**    MILWAUKEE, WISCONSIN

*Leveraging blighted federal buildings to create supportive housing for homeless veterans*

The Soldiers Home Historic District on the grounds of the Milwaukee VA Medical Center is a National Historic Landmark, and one of Milwaukee’s most important historic assets.

In Wisconsin’s first hybrid LIHTC structure using both 4% and 9% credit allocations, and as part of an Enhanced Use Lease agreement with the U.S. Department of Veterans Affairs, The Alexander Company and the Housing Authority of the City of Milwaukee created 101 permanent supportive housing units for veterans and their families who are homeless or at risk of becoming homeless. The project-based HUD Veterans Affairs Support Housing (HUD-VASH) vouchers are available so that residents pay approximately 30% of their monthly adjusted gross household income towards rent. Supportive services are provided on-site by the Milwaukee VA Medical Center HUD-VASH program.

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| <b>Types of housing provided:</b>   | <b>Funding sources:</b>   |
| <ul style="list-style-type: none"><li>Project-based HUD-VASH vouchers for veterans and families who are homeless or at-risk of homelessness, with wrap-around supportive services</li></ul> | <ul style="list-style-type: none"><li>State and Federal Historic Tax Credits</li><li>State and Federal LIHTC</li><li>Military Construction Funds</li><li>City Housing Trust Funds</li><li>Capital Campaign</li><li>Other soft financing</li></ul> |

# REFERENCES



# REFERENCES

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**Reference:** Amy Mauel, LCSW, Homeless Prevention Program Manager  
Milwaukee VA Medical Center  
5000 W. National Avenue, Milwaukee, WI 53295  
414.384.2000 x41276 | amy.mauel@va.gov

**Project Name:** Milwaukee Soldiers Home

**Location:** Milwaukee, Wisconsin

**RFQ Member:** The Alexander Company

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**Reference:** Bonnie Robertson, Asset Manager  
Wisconsin Housing and Economic Development Authority  
PO Box 1728, Madison, WI 53701  
608.266.7367 | bonnie.robertson@wheda.com

**Project Name:** Multiple, completed and ongoing

**Location:** Throughout Wisconsin

**RFQ Member:** The Alexander Company

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**Reference:** Fernando Aniban  
Housing Authority of the City of Milwaukee  
809 N. Broadway Street, Milwaukee, WI 53202  
414.286.5885 | fernando.aniban@hacm.org

**Project Name:** Multiple, completed and ongoing

**Location:** Milwaukee, Wisconsin

**RFQ Member:** Baker Tilly

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**Reference:** Dan Brown  
Executive Manager, Ho-Chunk Gaming Madison  
(Board of Directors, Madison Region Economic Partnership)  
4002 Evan Acres Road, Madison, WI 53718  
608.223.9576 x3538 | dan.brown@ho-chunk.com

**Project Name:** Ho-Chunk Gaming Madison 4 Lakes District  
Redevelopment and Master Plan

**Location:** Madison, Wisconsin

**RFQ Member:** Strang

# DISCLOSURES

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Neither The Alexander Company nor any included team members have had any foreclosure, default or bankruptcy within the past ten years.

Furthermore, neither The Alexander Company nor any included team members have had any litigation completed, pending, or underway in relation to any financing or construction project within the past five years.

# COMPLIANCE



# COMPLIANCE

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## Affirmative Action

The Alexander Team intends to comply with the Affirmative Action Ordinance of the City of Madison (MGO 39.02).

## Appropriate Licensing



The Alexander Company does not require licensing for development purposes, but is a WHEDA-approved Certified Management Agent for housing tax credit programs. Sufficient Errors and Omissions Insurance will be carried for the project duration.



Strang is licensed in the State of Wisconsin and has the proper licensing requirements for their architects and engineers. They are happy to provide such certificates if desired. They also have sufficient insurance to carry Errors and Omissions for the project duration.



Baker Tilly is licensed to practice public accounting in 36 states, including Wisconsin. State licensing certifications are documented and can be provided upon request. All key CPAs assigned to the CDA's engagement are licensed to practice public accounting.



Wisconsin does not require a contractors' license; however, JCP Construction has a Dwelling Contractors License #031000091. JCP Construction is insured by Sentry Insurance a Mutual Company. Their insurance coverage includes Commercial General Liability, Automobile Liability, Umbrella Liability, Worker's Compensation and Employers' Liability, Professional and Pollution Liability.



Wisconsin does not require a contractors' license; however, JP Cullen does have a Dwelling Contractors License #386327. JP Cullen is insured by Travelers Casualty and Surety Company of America. Their insurance coverage includes Commercial General Liability, Automobile Liability, Umbrella Liability, Compensation and Employers' Liability, Professional and Pollution Liability.



For Saiki Design, both Ken and Abbie are licensed in the State of Wisconsin to practice landscape architecture. Their license numbers are included on their previously provided biographies.



OTIE is licensed in the State of Wisconsin and will carry Errors and Omissions insurance for the project duration.



JSD is a fully-licensed engineering and surveying firm in the State of Wisconsin. JSD will maintain both their state-required licenses, as well as the individual professional Engineer and Professional Land Surveyor licenses throughout the duration of the project.

# CONTACTS



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**Alexander**  
Company



STRANG



bakertilly

**JCP**  
CONSTRUCTION

**CULLEN**  
THE TOUGH JOB EXPERTS



**ONEIDA**  
Total Integrated  
Enterprises

**JSD**

*Thank You*

FOR YOUR TIME AND CONSIDERATION