

Table of Contents

1. Who will be your Property Management Company? (Page 2)
2. What is your experience with brownfields? (Page 2-3)
3. Who is your environmental contractor? (Page 3)
4. What is your plan for addressing contaminated soil on the site? (Page 3)
5. What are the operating plans for the commercial tenants? (Page 3-4)
Please see attached for Operating Plans
6. What are your plans in case one of the commercial tenants does not work out? (Page 4)
7. Are you open to changing your commercial tenants? (Page 4)
8. How will you increase engagements with the residents who live in the area? (Page 5-6)
9. What is the impact of not receiving one or more of the financing mechanisms listed in your proposal? (Page 6)
10. Additional Comments (Page 7)
11. How do we increase engagement with the building residents? (Page 7-9)
12. Supportive Services Engagement (Page 10 -12)
13. Fair Housing and Management Plan (Page 13-16)
14. Development Team Harambee Offices (page 16)

1. **Who will be your Property Management Company?**

- TEAM Management. TEAM Co-Owner Darnell Williams is also an ACRE Graduate.

2. **What is your experience with brownfields?**

- Please see below for experience from the Architect, Civil, Contractor, and Development team.

Abacus Architecture:

- “Abacus Architects is a full-service Architecture, Civil Engineering and Interior design firm that has 20 years of experience in industry doing projects of all types. To date we have done over 1,391 units and counting with more than five hundred units expected to start design in the next year or so. With this experience we have come across brownfields quite often. Most currently we have done Rincon apartments in Hartford, West River Lofts in Two Rivers, The Tannery in Sheboygan Falls, and River North apartments in Manitowoc all with compromised soils and challenges with the site. We have used companies like The Sigma Group, Fehr Graham and Stantec as partners on these projects to make sure that the projects are done correctly to protect all parties involved. With our in-house civil engineering team, we can identify challenges and solve any issues during schematic design helping the project be much more successful.”

The Sigma Group (Civil and Environmental): Please see attached company profile and project examples, as well as the bullet point below.

- Sigma’s considerable experience with Brownfield investigation, remediation, and redevelopment, Sigma is currently working on the MLK EDC Five Points housing development project located at 3317-3345 N MLK Jr. Drive and 456 W Concordia Ave, which is just up the street from the proposed redevelopment project. Sigma is providing civil, survey, and environmental engineering services at the Five Points project to deliver both site design and engineering as well as remediate and manage the site-wide contaminated soils to ensure the site is protective of human health and the environment following redevelopment and meet the regulatory requirements for WDNR case closure.

KG Development Group

- Anthony Kazee has 7 years of construction experience as a Project Engineer in the construction industry. To date Anthony has managed \$600 Million in construction projects. With this experience Anthony has come across **Brownfield sites** and **Superfund sites** Anthony has collaborated with companies

like The Sigma Group, Kaukauna Environmental Engineers, Fehr Graham and Stantec as partners on projects to ensure projects are done environmentally compliant to ensure safety to residents, the community, and construction trades professionals.

Catalyst Construction

- Brownfield construction can be a complex and challenging process, as it requires careful planning and execution to ensure that the site is properly cleaned up and that the new development does not create any new environmental problems. Catalyst has completed a number of notable projects that involved varying levels of site remediation, including The Milwaukee Ballet, Rocketship Charter School, Freshwater Apartments, Milwaukee Rescue Mission – Cross Trainers Academy and many others.
- Catalyst is engaged from the very first step in brownfield site analysis, assisting the Environmental Engineer (EE) in the assessment of site contamination as necessary through test pits, soil sampling and Phase 1 and Phase 2 review. Once the EE provides their initial findings and recommendations, Catalyst provides construction costing and constructability evaluation, in collaboration with the EE and Civil Engineer to minimize cost impacts while carefully planning the construction activities necessary to properly remediate the site. Once the final site remediation plan is approved, Catalyst's Project Team executes the construction activities while properly documenting all work to meet AHJ requirements and construction standards.

3. Who is your environmental contractor?

- The Sigma Group

4. What is your plan for addressing contaminated soil on the site?

- The plan for addressing contaminated soil initially includes site investigation and characterization of impacted soil at the site to determine the source, nature, and extent of residual contamination. Upon characterizing the degree and extent of contaminated soil (and potentially other subsurface media), we would prepare a site-specific soil management plan to effectively manage contaminated soil during remediation and redevelopment of the site, with the goal of reducing and effectively mitigating the potential risks posed by contaminated soil to human health and the environment. The soil management plan would take into consideration redevelopment plans and future site conditions, as well as alternatives to hopefully reduce landfilling and carbon footprint. On and/or off-site management of contaminated soil and potential construction and maintenance of a site-specific cap over the remaining contaminated soil would comprise the approach to addressing contaminated soil on the site and meet both redevelopment needs and regulatory requirements. The team will continue Constant communication with DCD, DNS,

DNR and all other appropriate orgs to confirm compliance before, during and after construction.

5. What are the operating plans for the commercial tenants?

- The typical operating hours for our commercial owner occupants range from 5:00 a.m. to 9:00 p.m. daily. Similar to MLKEDC's current portfolio, we request TEAM Management to provide onsite maintenance for the commercial spaces instead of requesting the commercial owner occupants to source their own maintenance experts. We collaborate with commercial owner occupants to source grant opportunities when their lack of finances causes delayed rent payments or issues with properly scaling their business on King Drive, including ARPA funding, white box grants and signage grants. We often refer our commercial owner occupants who request marketing assistance to culturally relevant marketing professionals who can assist them with increasing their market share, customer base and brand recognition. We are not the typical property owner because we provide these sources of technical assistance. This technical assistance helps our commercial owner occupants to succeed, while furthering our mission to support and increase the economic vitality of Harambee. Because we are hands-on with our commercial tenants, it increases the likelihood that they will be long-standing tenants and long-standing businesses that residents can rely on.

Please see attached for specific operating plans for each committed commercial owner occupant:

6. What are your plans in case one of the commercial tenants does not work out?

- Currently, MLKEDC has a waitlist of companies seeking commercial spaces. One source to fill any gap is to review our list of prospective commercial owner occupants and pair that with the review of neighborhood charettes to determine if their request for space matches the community needs for goods and service providers. We meet with the prospective owner-occupants to determine if they have the financial capacity to enter a long-term commercial lease and inquire about the benefits, they can offer the neighborhood. If it is a match, we will contact the prospective commercial owner occupant to determine if they still have an interest in collaborating with us and what is their capacity for a long-term agreement with our development team. An additional opportunity to source commercial owner occupants is our continued relationship with the King Drive BID as they often refer viable businesses to us

who are seeking to operate space on King Drive. When these avenues do not provide an option we work with Marnie Noel of Noel, President of Noel Real Estate Advisors, LLC. Ms. Noel is a 2015 ACRE graduate and often sources business for our current portfolio for our commercial spaces.

7. Are you open to changing your commercial tenants?

- Yes, our development team is flexible and is willing to modify the commercial tenants based on resident and neighborhood needs for goods and services. Our current practice is to review neighborhood plans and charrettes to determine wants and needs of the community to ensure that the right commercial mix is available to support individuals and families. We will continue with this process to ensure that neighborhood voices are heard and empowered by our commercial offerings.

8. How will you increase engagements with the residents who live in the area?

Community Convening for Affordable Housing

- The mission of Community Convening is to expand the meaning of a building to empower all residents to build up their neighborhoods.
- KG Development Group implements Open Table's Community Convening focusing on impacting the neighborhoods surrounding the building. Community Convening leverages excitement, commercial investment, and the businesses that benefit from the development. With the businesses that benefit, a Community Convening is formed and then expanded to include additional community sectors. The charge of the Convening is to listen to neighborhood residents about their goals and barriers and then use its collective networks, workforce, skills, influence, and resources to empower the neighborhood to impact the lives of residents.
- **Convening members include** building and neighborhood residents, KG Development and its team members, general and sub-contractors, financing entities, and others.
- **Community Sectors invited to the Convening:** King Drive Business Improvement District, Harambee Community Association, Harambee Neighborhood Improvement District, Harambee Businesses, civic club, education, faith community, government, healthcare, and social service agencies.

- **Training and Coordination:** Open Table provides training and coordination for the Community Convening and its process to remove barriers.
- A neighborhood organization coordinates the referral of priority requests from the neighborhood for support. The Convening develops potential solutions presented to the neighborhood, refined, and implemented.

Potential Neighborhood Support Requests might include:

- Advocacy for city services
- Car service day with volunteer mechanics diagnosing issues and repair solutions.
- Dentistry for those who do not have coverage (rides to dentists offering no cost or sliding scale work)
- FAFSHA help event helping parents fill out the forms.
- Fix-up events with the trades making crisis repairs and community members doing aesthetic work.
- Forum on starting a business.
- Medical equipment not covered by Medicaid.
- Neighborhood events
- Ride availability for doctors' appointments and other needs
- Supportive services for seniors aging in place.
- Safety-related
- Social worker office hours
- Tutor network

9. What is the impact of not receiving one or more of the financing mechanisms listed in your proposal?

- We believe our Five Points project will prove to be more challenging to move towards construction compared to King Drive and Burleigh. In 2021 and 2022, the Five Points project experienced significant increases in construction costs and interest rates due to the pandemic. As of September 2022, the construction environment has stabilized, and we do not foresee cost hikes like we saw in 2021 and 2022. We have multiple measures in place if one of the financing mechanisms is not received. We also have two Nonprofit partners to apply for additional grant opportunities. MLKEDC is a CHDO as well. The following measures we have in place include:
 - Value Engineering
 - Reduce Development Fee
 - Reduced professional Fees (Legal, Contractor, Design team)

- Additional Deferred Fee
- Seek an equity partner who offers debt which will increase the equity pricing.
- Utilize NMTC if needed to offset the commercial costs
- Apply for Project Based Vouchers to help increase the size of the debt
- Seeking additional funding from the County of Milwaukee Housing Division
- Seek additional national grants from our OpenTable non profit partner,
- Apply for RACM loans as there interest rates are more flexible

Additional Responsibilities

10. How do we increase engagement with the building residents?

- All the community is a stakeholder in the building and the lives of its residents. Building residents are both neighborhood and community members. KG Development Groups collaborates with its partner, Open Table, to implement and facilitate its community engagement models.

Community Convening

- Community Convening breaks down community silos and brings together sectors to collaboratively support and integrate the building into the community's life and position the building as a destination for neighborhood and community members. A “Convening” can include representatives from the business, education, faith community, foundations, government, healthcare non-profit, and social services. KG Development Group and its partners, organizations renting commercial space, the management company, the construction company, and a building resident also serve on the Convening. While many business leaders serve on nonprofit boards and participate in an organization's governance, Community Convening is an opportunity to directly

add value to the community and create new service opportunities. Together, using their personal, business, and social connections, a Convening develops strategies and resources for strategic initiatives -- some simple and some complex. The Convening begins meeting upon construction funding to develop relationships with each other and use the time for advance planning. Following are some examples:

- **Welcoming New Residents:** Convening members reach out to connections in the hospitality and retail industries to bring together a welcome gift bag for each resident, individual, or family. The bags include personal care items, snacks, a guide to the neighborhood, and, most importantly, a welcome card signed by convening members.
- **Welcoming the Community:** Convening members reach out to neighborhood organizations to plan an event after leasing and move-in are completed to invite community members to meet their new neighbors and tour the building.
- **Access to Technology:** Convening members reach out to companies, including their own, to access recently retired laptop computers that are certified to be in good working condition, with a commitment that every apartment unit has a well-functioning computer. The Convening taps into computer trainers at local companies who offer basic classes and are available by email to answer computer questions.
- **Activities for Older Adults:** Convening members reach out to a market researcher at one of their organizations who creates a survey for older adults about the kinds of activities they would like to participate in. Residents are invited to form a committee to implement the activities. The Convening then uses its networks, including faith communities and civic organizations, to find a sponsor already involved in the activity who would help bring it to the building. These activities might include book clubs, low-impact aerobics (the Convening sources athletic shoes for those who do not have them), art, and therapy animals.
- **Community Destination Event:** A “Taste of...” event is developed by the grocery store with invited food trucks, and a farmers market experience is developed and with the neighborhood invited. The Convening members invite their workforce members to stop by and participate. Offering food trucks, the opportunity to park also supports community entrepreneurs working to build businesses.
- **Resident Newsletter:** Open Table works with Career and Technical Education classes in school districts. One of the major tracks is “marketing and

communications.” The Convening’s education members will invite a CTE class to take on the development of a quarterly newsletter for residents as part of its external experience requirements.

Network Table

A Network Table is a team of volunteers trained to access their personal, social, and business networks (social capital) to help individuals or families overcome a barrier they cannot solve independently. Open Table organizes Network Tables around the country to develop community-based resources. Examples of solutions Network Tables develop:

- Advocacy with systems
- Apartment furnishings
- Birthday celebrations
- Budgeting
- Car repair and tire replacement
- Children want to learn soccer techniques.
- Children want to learn musical instruments.
- College financial aid navigation
- Credit repair/negotiating
- Dentistry
- Donated bicycles
- Job search (also connect with the network Table)
- Legal - “Ask an attorney” events.”
- Meals delivered after returning home from the hospital.
- Medical bills advocacy
- Medical equipment is not covered by insurance.
- Resume writing and interview practicing.
- Rides for medical and other appointments or needs.
- Television/computer repair
- School supplies and needs

Neighbors

- Neighbors is an evidence-driven relational model based on more than 20 Open Table studies and university case studies about the transformational impact of relationships. In the Neighbors model, an individual in the community is recruited and trained to connect with a building resident who may be affected by isolation. Together they send encouraging texts, ask each other how they are doing, and become relational supports to one another. This model is especially impactful with older adults.

Eviction Intervention

- Should finances or other barriers be causing an eviction possibility both Community Convening and Network Tables can be resources called upon by building management to prevent and/or help cure the situation.

11. Supportive Services Engagement?

- Our vision for the Intergenerational RFP proposal on MLK drive is for it to have 20 percent Permanent Supportive Housing. We will also collaborate with Milwaukee County housing first intuitive which will offer a referral network for those at risk of experiencing homelessness. We will also forge an alliance with Milwaukee County Family Services to work with families, especially grandfamilies to foster family unification of at-risk families through the offering of stable housing, as well as community-based service resources.

The collaboration of supportive services includes the property management:

- **The property management will focus on tenant Relations:** Property managers in supportive housing are responsible for fostering positive relationships with tenants. This includes ensuring clear communication, addressing concerns or complaints, and providing support services or referrals to appropriate agencies or organizations.
- **Lease and Documentation:** Property managers oversee lease agreements and ensure all necessary documentation is completed accurately and efficiently. They may also assist tenants in understanding their rights and responsibilities, as well as any applicable regulations or subsidy programs.
- **Rent Collection and Financial Management:** Property managers are responsible for collecting rent from tenants and ensuring timely payment. They may also manage financial records, budgeting, and accounting for the property, as well as coordinating with relevant agencies or organizations for subsidy programs or rental assistance.
- **Maintenance and Repairs:** Property managers oversee the maintenance and repairs of the supportive housing facility, ensuring that it meets health, safety, and accessibility standards. They coordinate regular inspections, address maintenance requests, and manage relationships with contractors or maintenance staff.
- **Compliance and Regulations:** Property managers ensure that the supportive housing facility complies with local, state, and federal regulations, including

building codes, fair housing laws, and accessibility requirements. They may handle inspections, permits, and necessary documentation to maintain compliance.

- **Safety and Security:** Property managers are responsible for ensuring the safety and security of the supportive housing facility and its residents. This may involve implementing security measures, addressing safety concerns, and coordinating with local law enforcement or security agencies if needed.
- **Community Engagement:** Property managers may facilitate community-building activities and encourage tenant involvement in the supportive housing community in collaboration with provider. This can include organizing events, connecting tenants with local resources or support services, and promoting a sense of belonging and cohesion among residents.

Overall, the property management role in supportive housing is crucial in creating a safe, supportive, and well-maintained living environment for residents, while also addressing their unique needs and promoting their overall well-being.

- The supportive service providers will include the collaboration of **Care Management Plus Health services** a provider that has provided supportive services for Family Care (Mychoice and Community Care) for the past 20 years. They have expertise in supporting those with chronic illness and preventing institutionalization.
- **Vista Care** is another collaborator, and they offer supportive services to individuals with intellectual disabilities and have expertise in life-skills coaching.

Supportive services will include:

- Resource Management and community support connection
- Peer-Support, offering collaboration with persons with lived experience, and create greater self-determination.
- Assistance with daily-living services coordination to increase housing sustainability and retention.
- Services are flexible enough to address each individual tenant's needs, which may involve multiple service agencies working together. These teams also try to link people to mainstream service systems like work training, if appropriate.
- Digital Health Services

According to the U.S. Census Bureau's 2019 American Community Survey, approximately 2.7 million grandparents were responsible for raising their grandchildren. The needs of these Grand-Parent Families will be considered within this development as these families present unique consideration. These services include:

- **Case Management:** Case management services are often provided to grand families to help them navigate the complex systems involved in raising children. Case managers can assist with accessing benefits, connecting with community resources, and providing guidance and advocacy on various issues, including education, healthcare, and legal matters.
- **Counseling and Support Groups:** Supportive services may offer counseling or therapy for both grandparents and grandchildren to address emotional, behavioral, or psychological challenges. Additionally, support groups specifically tailored to grand families can provide a safe space for sharing experiences, obtaining advice, and building social connections with others in similar situations.
- **Educational Support:** Educational support services can be crucial for grand families, as many grandchildren may have experienced disruptions in their schooling. Supportive services may include tutoring, after-school programs, or assistance in navigating the education system to ensure that children receive the necessary academic support.
- **Financial Assistance:** Grand families may face financial challenges due to the additional responsibilities of raising grandchildren. Supportive services may provide information and assistance in accessing financial resources, such as temporary assistance programs, childcare subsidies, or grants specifically designed for grand families.

The development will also include a close collaboration with Open Table, a group that seeks to develop social capital networks, many which are what is known as Bridge Networks. Bridge Networks is defined as; This refers to connections and relationships that extend across diverse groups or communities. Bridging social capital promotes interaction and collaboration between different social, cultural, or professional groups, fostering diversity, cooperation, and exchange of ideas, and resources.

Open Table utilizes social capital to improve the conditions of individuals, as well as community. Yet, Open Table has a collaboration that seeks to draw out research on the effectiveness of social capital, and its impact on key societal issues. These research collaborators include:

- Anthem Blue Cross
- Mayo Clinic

Trust and Reciprocity are the foundation in which social capital is built, and Open Table are the social architects of these initiatives.

12. Fair Housing and Management Plan

KG Development Group, One5Olive, and MLKEDC do not tolerate discrimination in the application for housing not the tendency of housing. KG provides a non-discriminatory process to supply rental opportunities to prioritize tenants. KG does not tolerate the discrimination in housing in any manner including but not limited to age, race, sex, gender orientation or national origin. KG strives to supply quality housing for all qualified applicants. We will supply reasonable access to properties for those physically challenged.

Below is our management plan:

A. Screening Criteria

At KG Development Group we strive to select the best applicants.

Our screening criteria includes the following:

- A WRITTEN APPLICATION. Property Management requires all applicants to complete the application in the office. This helps eliminate false information from being reported. This does not give the applicants an opportunity to take the application off site and craft false answers.
- A CURRENT PHOTO ID: The information on the ID is compared to information on the application and result of the background check.
- EARNEST MONEY DEPOSIT: This assures that the applicant is serious about securing housing and willing to make a financial commitment.
- RENTAL HISTORY: Property Management compares information to what was stated in the original application.
- CRIMINAL RECORD: This is used to obtain evidence of threats to rental property and manufacture or distribution of controlled substances.

- CREDIT HISTORY: The credit report can be used to spot inconsistencies in dates of residency as well as evaluating payment history.

The selection process is a wonderful time to begin building a rapport with prospective tenants.

They will be introduced to our expectations and tolerance level.

B. Tenant Relations

Upon commencement of the management assignment, the management team will personally visit each resident.

what is expected of the residents and take away an impression of what they expect? from us.

C. Lease Up & Leasing

Property Management has been successful in many lease-ups. We begin the leasing process by using floor plans. This gives us an opportunity to lease many of the units before the property is complete. To maintain high occupancy levels, we establish a marketing plan that maximizes the advertising dollar and meets the goals of the property.

D. Operations & Maintenance

The operations plan is designed to protect the assets and maximize savings. This is accomplished through regular property inspections and prompt responses to emergency situations. Our management team maintains a preventative maintenance program by collaborating closely with on-site personnel as well as outside contracting firms.

We will assess each maintenance issue and put it into one of four maintenance categories. These categories are:

- CUSTODIAL MAINTENANCE: The on-site caretaker will reside in the manager unit and receive discounted rent for custodial duties. These duties include day to day housekeeping, policing grounds, assisting with apartment turnovers, and light maintenance.

- **CORRECTIVE MAINTENANCE:** These are service requests received from the residents and are assigned by the property manager. These tasks will be assigned to the maintenance technician or an outside contractor based on skill level required.
- **PREVENTATIVE MAINTENANCE:** The maintenance technician will make regular inspections of the buildings and grounds. Based on these inspections, The maintenance technician will ensure that the facilities are operating properly.
- **EMERGENCY MAINTENANCE:** Twenty-four-hour emergency service is provided to the residents. Depending on the severity of the problem calls may be handled by the maintenance technician or an outside contractor.

E. Financial Control

Financial controls are critical to sound management. This includes accuracy, budgets, cost control, strict collections, income, and expense variance reports, and cash management. These controls are planned and implemented to realize goals and objectives as established in conjunction with ownership.

F. Compliance

Property Management provides compliance services for Section 42 Low to Moderate Income Tax Credit Projects. Our process includes insuring compliance with federal and state regulation, proper and timely reporting, tenant income eligibility, and basic LIHTC program fundamentals.

As property manager, our responsibilities would include, but not be limited to:

- Compliance of Federal, State, and IRS policies/regulations
- Proper and timely reporting to the above agencies
- Certifying eligibility requirements of tenants
- Complying with Low Income Housing Tax Credit Program Fundamental

Development Team offices located in Harambee

One 5 Olive – 400 E Locust

KG Development Group – 3048 N 1st St.

MLKEDC – 2745 N MLK Jr Dr.