



# City of Milwaukee

City Hall  
200 East Wells Street  
Milwaukee, WI 53202

## Meeting Agenda COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

*ALD. JOE DAVIS, SR., CHAIR*

*Ald. T. Anthony Zielinski, Vice-Chair*

*Ald. James Witkowiak, Ald. Willie Wade, Ald. Terry Witkowski*

*Staff Assistant, Tobie Black, 286-2231*

*Fax: (414) 286-3456, E-mail: [tblack@milwaukee.gov](mailto:tblack@milwaukee.gov)*

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Tuesday, April 6, 2010

9:00 AM

Room 301-B, City Hall

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Amended 4/1/10

1.     [091503](#)     Appointment of Matthew O'Neil to the Business Improvement District Board #16 (West North Avenue) by the Mayor. (4th Aldermanic District)  
  
          Sponsors:     THE CHAIR  
  
          Attachments:   [Appointment Letter](#)  
                              [Resume](#)  
                              [Hearing Notice List](#)
  
2.     [091522](#)     Appointment of John Grunau to the Business Improvement District Board #42 (Schlitz Park) by the Mayor.  
  
          Sponsors:     THE CHAIR  
  
          Attachments:   [Appointment Letter](#)  
                              [Resume](#)  
                              [Hearing Notice List](#)
  
3.     [091506](#)     Appointment of Jake Provan to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor.  
  
          Sponsors:     THE CHAIR  
  
          Attachments:   [Appointment Letter](#)  
                              [Resume](#)  
                              [Hearing Notice List](#)
  
4.     [091510](#)     Appointment of Steven Ste. Marie to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor.  
  
          Sponsors:     THE CHAIR  
  
          Attachments:   [Appointment Letter](#)  
                              [Resume](#)  
                              [Hearing Notice List](#)
  
5.     [091511](#)     Appointment of Michael Marx to the Business Improvement District Board #44

(Kinnickinnic Avenue) by the Mayor.

**Sponsors:** THE CHAIR

**Attachments:** [Appointment Letter](#)  
[Resume](#)  
[Hearing Notice List](#)

6. [091509](#) Appointment of Joyce Parker to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor. (14th Aldermanic District)
- Sponsors:** THE CHAIR
- Attachments:** [Appointment Letter](#)  
[Resume](#)  
[Hearing Notice List](#)
7. [091593](#) Appointment of Frank Giuffre to the Business Improvement District Board #43 (South 27th Street) by the Mayor. (13th Aldermanic District)
- Sponsors:** THE CHAIR
- Attachments:** [Appointment Letter](#)  
[Biography Pages](#)  
[Hearing Notice List](#)
8. [091595](#) Appointment of Rodney Reider to the Business Improvement District Board #43 (South 27th Street) by the Mayor. (8th Aldermanic District)
- Sponsors:** THE CHAIR
- Attachments:** [Appointment Letter](#)  
[Resume](#)
9. [091594](#) Appointment of Milan Kresovic to the Business Improvement District Board #43 (South 27th Street) by the Mayor. (13th Aldermanic District)
- Sponsors:** THE CHAIR
- Attachments:** [Appointment Letter](#)  
[Resume](#)  
[Hearing Notice List](#)
10. [091592](#) Appointment of David Bardon to the Business Improvement District Board #43 (South 27th Street) by the Mayor. (13th Aldermanic District)
- Sponsors:** THE CHAIR
- Attachments:** [Appointment Letter](#)  
[Resume](#)  
[Hearing Notice List](#)
11. [091596](#) Appointment of Thomas Bernacchi to the Business Improvement District Board #43 (South 27th Street) by the Mayor. (13th Aldermanic District)
- Sponsors:** THE CHAIR

Attachments: [Appointment Letter](#)  
[Resume](#)  
[Hearing Notice List](#)

9:15 A.M.

12. [091401](#) Communication from the Brewery Project LLC relating to a 2009 progress report.

Sponsors: THE CHAIR  
Attachments: [The Brewery Progress Report](#)  
[Hearing Notice List](#)

13. [091616](#) Communication relating to the Milwaukee Continuum of Care's report on the Ten-Year Plan to End Homelessness.

Sponsors: THE CHAIR  
Attachments: [10 Year Plan to End Homelessness](#)  
[Hearing Notice List](#)

14. [091566](#) Resolution relating to the intent to issue Industrial Development Revenue Bonds for the Alterra Coffee Roasters, Inc. Project.

Sponsors: THE CHAIR  
Attachments: [Exhibit A](#)  
[Notice of Intent-Job Estimate Form](#)  
[Department of City Development Letter](#)  
[Fiscal Note](#)  
[Hearing Notice List](#)

*---Consideration of Resolution relating to the intent to issue Industrial Development Revenue Bonds for the Alterra Coffee Roasters, Inc. Project. Information with respect to the job impact of the project will be available at the time of consideration of the Initial Resolution.*

15. [091588](#) Substitute resolution authorizing an expenditure of \$25,000 from the Development Fund to relocate electrical service for the 35th Street Viaduct street lighting substation to facilitate the Silver City Townhomes project, in the 8th Aldermanic District.

Sponsors: Ald. Donovan  
Attachments: [Fiscal Note](#)  
[Hearing Notice List](#)

9:30 A.M.

16. [091215](#) Communication from the Community Development Grants Administration relative to the Final Year 2009 Consolidated Annual Performance and Evaluation Report.

Sponsors: THE CHAIR

**Attachments:**    [Neighborhood Strategic Planning Coordinating Agencies](#)  
[Homebuyer Counseling & Other Homebuyer Assistance Activities](#)  
[Home Purchases from 2004 to 2008 Assisted by the United Community Center](#)  
[Report from Housing Resources, Inc](#)  
[Report from Select Milwaukee, Inc](#)  
[Special Economic Development-Business Assistance](#)  
[Report from Career Youth Development, Inc](#)  
[Report from Wisconsin Women's Business Initiative](#)  
[Report from Avenues West Association](#)  
[Report from the SOHI District](#)  
[Report from Lincoln Neighborhood Redevelopment Corporation](#)  
[Hearing Notice List](#)

This meeting will be webcast live at [www.milwaukee.gov/channel25](http://www.milwaukee.gov/channel25).

Members of the Common Council and its standing committees who are not members of this committee may attend this meeting to participate or to gather information. Notice is given that this meeting may constitute a meeting of the Common Council or any of its standing committees, although they will not take any formal action at this meeting.

Upon reasonable notice, efforts will be made to accommodate the needs of persons with disabilities through sign language interpreters or auxiliary aids. For additional information or to request this service, contact the Council Services Division ADA Coordinator at 286-2998, (FAX)286-3456, (TDD)286-2025 or by writing to the Coordinator at Room 205, City Hall, 200 E. Wells Street, Milwaukee, WI 53202.

Limited parking for persons attending meetings in City Hall is available at reduced rates (5 hour limit) at the Milwaukee Center on the southwest corner of East Kilbourn and North Water Street. Parking tickets must be validated in Room 205, (City Clerk's Office) or the first floor Information Booth in City Hall.

Persons engaged in lobbying as defined in s. 305-43-4 of the Milwaukee Code of Ordinances are required to register with the City Clerk's Office License Division. Registered lobbyists appearing before a Common Council committee are required to identify themselves as such. More information is available at [www.milwaukee.gov/lobby](http://www.milwaukee.gov/lobby).



## Legislation Details (With Text)

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**File #:** 091503      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/2/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of Matthew O'Neil to the Business Improvement District Board #16 (West North Avenue) by the Mayor. (4th Aldermanic District)

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 16

**Attachments:** Appointment Letter, Resume, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/2/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091503

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of Matthew O'Neil to the Business Improvement District Board #16 (West North Avenue) by the Mayor. (4th Aldermanic District)

**Drafter**

Mayor

TB

3/2/10

March 2, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to make the following appointments to the Business Improvement District Board #16  
(West North Avenue):

Mathew O'Neill – Replacing Juergen Hartter  
Friebert, Finerty & St. John  
Two Plaza East – Suite 1250  
330 East Kilbourn Avenue  
Milwaukee, Wisconsin 53202

Barbara Behlke – Replacing Laura Pryor  
Behlke Consulting, Inc.  
P.O. Box 100906  
Milwaukee, Wisconsin 53210

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and Common Council File No. 950718. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Tom Barrett", with a stylized flourish at the end.

Tom Barrett  
Mayor

**MATTHEW W. O'NEILL**

**FRIEBERT, FINERTY & ST. JOHN, S.C.**

Two Plaza East, Suite 1250

330 East Kilbourn Avenue

(414) 271-0130 (Work)

(414) 426-9318 (Cell)

[mwo@ffsj.com](mailto:mwo@ffsj.com)

**EDUCATION & WORK HISTORY**

- Bachelor of Arts - University of Notre Dame (1988) (*cum laude*)
- Juris Doctorate - Marquette University Law School (1991) (*magna cum laude*)
- Law Clerk to Wisconsin Supreme Court Chief Justice Nathan S. Heffernan (1991-92)
- Attorney, Friebert, Finerty & St. John, S.C. (1992-present)

**LEGAL PRACTICE**

Mr. O'Neill, a partner at Friebert, Finerty & St. John, focuses his practice on commercial litigation and appellate work. Mr. O'Neill has tried many cases and conducted numerous hearings in state court, federal court and before administrative decision makers. He was awarded Legal Action of Wisconsin's 2008 Exceptional Pro Bono Advocacy Award for obtaining a six-figure verdict for a local family whose belongings were wrongly sold at auction by a self-storage company. He has been recognized as a "Super Lawyer" by Milwaukee Magazine in the area of business litigation each year since 2006.

Mr. O'Neill has argued numerous cases before the Wisconsin Supreme Court, Wisconsin Court of Appeals and Seventh Circuit Court of Appeals, including *Einhorn v. Culea*, 2000 WI 65 (establishing standards for Special Litigation Committees and derivative litigation), *Notz v. Everett Smith Group*, 2009 WI 30 (establishing standards for claims by minority shareholders), and *Brew City v. Ferchill Group*, 2006 WI 128 (relating to dispute over Pabst Brewery development). Mr. O'Neill has been involved in several successful high-profile cases, including *City of West Allis v. WEPCO*, 2001 WI App. 226 (reversing \$100 million award against WEPCO), *Northwest Airlines, Inc. v. Wis. Dept. of Revenue*, 2006 WI 88 (upholding tax exempt status of Midwest Airlines), *Clean Wisconsin v. PSC*, 2005 WI 93 (upholding approval of new power plant in Oak Creek).

Mr. O'Neill also has substantial experience with campaign finance and election law, counseling numerous clients in campaign and election-related matters. He served as State Counsel for the Obama for America campaign and trained over 1,200 lawyers to monitor the polls on election day. He has testified before the United States Congress and the Wisconsin Senate on proposed reforms to federal and state election laws.

Mr. O'Neill is Vice President of the Eastern District of Wisconsin Bar Association, and serves as the Secretary of the Board of Trustees for Woodlands School in Milwaukee.

**PERSONAL BACKGROUND**

Mr. O'Neill was born in 1966 and is married to Shannon O'Neill. They have three beautiful daughters, Audrey, Sylvie and Daphne. In his spare time, Matt enjoys golfing, running with his dog Fergie, and completing the occasional marathon.



**NOTICES SENT TO FOR FILE: 091503**

[illegible]



## Legislation Details (With Text)

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**File #:** 091522      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/2/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of John Grunau to the Business Improvement District Board #42 (Schlitz Park) by the Mayor.

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 42

**Attachments:** Appointment Letter, Resume, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/2/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

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**File #:** 091522      **Version:** 0

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**Number**

091522

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of John Grunau to the Business Improvement District Board #42 (Schlitz Park) by the Mayor.

**Drafter**

Mayor

TB

3/2/10

March 2, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to make the following appointments to the Business Improvement District  
Board #42:

Sam Denny  
1555 North RiverCenter Drive, Suite 204  
Milwaukee, Wisconsin 53212  
(3-Year Term)

John Grunau  
849 East Birch Avenue  
Milwaukee, Wisconsin 53217  
(3-Year Term)

Susan Press  
W5151 Young Road  
Eagle, Wisconsin 53119  
(2-Year Term)

Tracey Villa  
1008 South Main Street  
Cedar Grove, Wisconsin 53013  
(3-Year Term)

Ken Deweerdt  
1858 North Commerce Street  
Milwaukee, Wisconsin 53212  
(1-Year Term)

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and  
Common Council File 090561. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Tom Barrett", with a stylized flourish at the end.

Tom Barrett  
Mayor

## JOHN GRUNAU

John Grunau has been in the Construction/Project Development industry for over 7 years. Working as a Project Manager for Gilbane Building Company as well as Manager of Construction for Brewery Works, Inc. John has been able to utilize his professional knowledge in the construction of multiple award winning projects in the community including Potawatomi Bingo and Casino Expansion, Schuster's Historic Building Renovation, Convent Hill Housing, just to name a few. John has been exposed to the intricacies of construction financing including traditional commercial loans, historic and new market tax-credits, TIF loans as well as the differences in public and private construction financing. John has grown up in Milwaukee and has begun to raise his family here. John's desire to assist in the betterment in Milwaukee is represented through his increasing level of community involvement.

### Profession

- Brewery Works, Inc - Manager of Construction

### Education

- BS - Economics - University of New Mexico

### Licenses and Certifications

- LEED Accredited Professional
- OSHA 30 Hour Certification

### Community Service

- Schlitz Audubon Center - Board Member - Facilities Committee Member
- Milwaukee RiverKeeper - Board Member - Fund Development Committee Chair
- Rebuilding Together Greater Milwaukee
- YWCA - Milwaukee
- NAWIC - Block Kids

**NOTICES SENT TO FOR FILE: 091522**

[illegible]



## Legislation Details (With Text)

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**File #:** 091506      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/2/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of Jake Provan to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor.

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 44

**Attachments:** Appointment Letter, Resume, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/2/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091506

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of Jake Provan to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor.

**Drafter**

Mayor

TB

3/2/10



March 2, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to make the following appointments to the Business Improvement District Board #44  
(Kinnickinnic Avenue):

William F. Doyle  
3042 South Wentworth Avenue  
Milwaukee, Wisconsin 53207  
(1-Year Term)

Steven M. Ste. Marie  
6155 North Shoreland Avenue  
Whitefish Bay, Wisconsin 53217  
(2-Year Term)

Jake M. Provan  
1410 Gabriel Drive - #5  
Waukesha, Wisconsin 53188  
(1-Year Term)

Michael M. Marx  
1630 East Decorah Road  
West Bend, Wisconsin 53095  
(2-Year Term)

Greg Mertens  
2800 West Lincoln Avenue  
Milwaukee, Wisconsin 53215  
(1-Year Term)

Jason C. Wedesky  
2983 South Superior Street  
Milwaukee, Wisconsin 53207  
(3-Year Term)

Ron Romero  
2768 South Lenox Street  
Milwaukee, Wisconsin 53207  
(1-Year Term)

Michael B. Krolick  
16325 West Marietta Drive  
New Berlin, Wisconsin 53151  
(3-Year Term)

Joyce Parker  
2685 South Kinnickinnic Avenue  
Milwaukee, Wisconsin 53207  
(1-Year Term)

To the Honorable, the Common Council

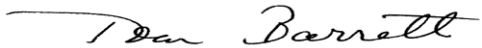
Page 2

March 2, 2010

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and Common Council File 090559. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in cursive script that reads "Tom Barrett". The signature is written in dark ink and is positioned to the left of the printed name.

Tom Barrett

Mayor

**Jake M. Provan**

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**Sales & Management Experience**

**Van Buren Management, Inc** **May 2005-Present**  
**Project Manager /Leasing Specialist & Downer BID Executive Director**  
Responsible for obtaining and negotiating new leases, maintaining current leases, and providing property management solutions for company owned properties in Downtown Milwaukee and surrounding areas.  
Created and presently manage the daily operations of the Historical Downer Avenue Business Improvement District.  
Raised \$300,000 in grant dollars and saved an additional \$93,000 for the 2009 Downer Avenue streetscape renovation project.

**Franklynn Development, Inc.-Brookfield, WI** **October 2001-May 2005**  
**Sports & Marketing Sales/Manager**  
Assisted in the development and management of a 5.5 million dollar soccer/multi-sport facility since the company's inception in 2001  
Responsibilities:

- Developed and executed marketing and sales proposals to large and small corporations such as Wyndham Hotels, Kohl's, Fed-Ex, and local companies.
- Face to Face sales presentations to potential clients.
- Created and built sport leagues and programs to attract sponsors and successful sales relationships emphasizing customers' needs.
- Recruited and Hired Staff based upon facility needs.
- Responsible for day to day operations.

**Viropharma, Inc./Aventis, Inc.-Naperville, IL** **March 2002-September 2002**  
**Pharmaceuticals Sales Representative/Co-Director Business Advisory Committee**  
Sold three different products to practicing physicians, hospitals, and pharmacy personnel within one of company's largest territories.  
Responsibilities:

- Head of Business Advisory Committee for Viropharma which included developing strategic business applications for associates throughout the Midwest to ensure successful sales and business practices while addressing accountability and professional discipline/focus.

**Education**

**UW-Whitewater** **2002-2005**  
Masters of Science Business Education / MBA Marketing (12 Credits)  
GPA 3.6  
**UW-Milwaukee** **1992-1996**  
BBA

**Professional Soccer/Coaching Experience**

**Milwaukee Bavarian NPSL Head Coach** **Present**

- Highest level of Soccer in the state of Wisconsin
- Recruited players from Division I colleges throughout the country

**Waukesha West Varsity Soccer Head Coach** **Present**

- Led team to 5<sup>th</sup> in State ranking in first season as coach.

**Milwaukee Wave- Milwaukee, WI** **1999-2001**  
**Professional Soccer Player**

- Won World Indoor Soccer Championship in 2000

**Milwaukee Rampage- Milwaukee, WI** **1996-1999**  
**Professional Soccer Player**

- Won A-league National Champion ship in 1997.

## **Achievements**

- |  |                  |
|--|------------------|
| <b>Waukesha West Varsity Soccer Head Coach</b>   | <b>Present</b>   |
| ▪ Led team to 5 <sup>th</sup> in State ranking in first season as coach.   |                  |
| <b>Franklynn Development</b>   | <b>2002</b>      |
| ▪ Created and implemented youth and adult football league that grew from eight teams to 42 within the first year generating additional revenue of 42K. |                  |
| <b>Milwaukee Wave- Milwaukee, WI</b>   | <b>1999-2001</b> |
| <b><u>Professional Soccer Player</u></b>   |                  |
| ▪ Won World Indoor Soccer Championship in 2000   |                  |
| <b>Milwaukee Rampage- Milwaukee, WI</b>  | <b>1996-1999</b> |
| <b><u>Professional Soccer Player</u></b>   |                  |
| ▪ Won A-league National Champion ship in 1997.   |                  |
| <b>UW-Milwaukee Men's Soccer team</b>  | <b>1992-1996</b> |
| <b><u>Soccer Player</u></b>  |                  |
| ▪ Team Captain 1995-1996   |                  |
| ▪ 4 Time All-Tournament selection  |                  |
| ▪ All-Midwest Team Selection   |                  |
| ▪ Awarded Coaches Award for Leadership   |                  |
| ▪ Leading Goal Scorer 1996   |                  |
| ▪ 3-time Student-Athlete Award for Academics and Athletic Performance  |                  |
| ▪ Drafted to Detroit Rockers of NPSL   |                  |

**NOTICES SENT TO FOR FILE: 091506**

[illegible]



## Legislation Details (With Text)

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**File #:** 091510      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/2/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of Steven Ste. Marie to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor.

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 44

**Attachments:** Appointment Letter, Resume, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/2/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091510

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of Steven Ste. Marie to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor.

**Drafter**

Mayor

TB

3/2/10

March 2, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to make the following appointments to the Business Improvement District Board #44  
(Kinnickinnic Avenue):

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Milwaukee, Wisconsin 53207  
(1-Year Term)

Steven M. Ste. Marie  
6155 North Shoreland Avenue  
Whitefish Bay, Wisconsin 53217  
(2-Year Term)

Jake M. Provan  
1410 Gabriel Drive - #5  
Waukesha, Wisconsin 53188  
(1-Year Term)

Michael M. Marx  
1630 East Decorah Road  
West Bend, Wisconsin 53095  
(2-Year Term)

Greg Mertens  
2800 West Lincoln Avenue  
Milwaukee, Wisconsin 53215  
(1-Year Term)

Jason C. Wedesky  
2983 South Superior Street  
Milwaukee, Wisconsin 53207  
(3-Year Term)

Ron Romero  
2768 South Lenox Street  
Milwaukee, Wisconsin 53207  
(1-Year Term)

Michael B. Krolick  
16325 West Marietta Drive  
New Berlin, Wisconsin 53151  
(3-Year Term)

Joyce Parker  
2685 South Kinnickinnic Avenue  
Milwaukee, Wisconsin 53207  
(1-Year Term)



To the Honorable, the Common Council

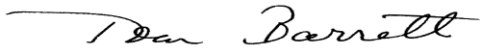
Page 2

March 2, 2010

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and Common Council File 090559. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in cursive script that reads "Tom Barrett". The signature is written in dark ink and is positioned to the left of the printed name and title.

Tom Barrett

Mayor

## STEVEN M. STE. MARIE

6155 N. Shoreland Avenue  
Whitefish Bay, Wisconsin 53217  
414-964-2196

### **PROFESSIONAL EXPERIENCE**

1997-present **PRESIDENT**—Shoreland Investments 4 LTD, parent company of Bay View Maytag Laundromat 2510 S. Kinnickinnic Ave. Milwaukee.

2000-2005 Jewel-Osco, Milwaukee, Wisconsin

**OPERATING MANAGER** Oversee sales and operations for a retail location of approximately \$4,000,000/yr with a staff of 25 while keeping within payroll constraints. Responsible for planning general merchandising of store products. Personally plan and execute all seasonal space and order merchandise accordingly. Promote sales plans and set goals for sales staff, resolve customer service issues.

1991-1999 Spic and Span, Inc-Milwaukee, Wisconsin

**ASSISTANT PRODUCTION MANAGER, DRYCLEANING MANAGER, PLANT MANAGER** for this privately held Dry Cleaning and Laundry plant with 40 drop stores and \$10 million in gross sales. Supervised approximately 90 employees in the areas of general production, garment finishing and full service alterations.

\* Reduced productive labor year over year in five of the last seven years, costs that ran 1% under prior year.

\* Provided technical advice in local newscasts and television spots on dry cleaning related issues (tapes are available).

1985-1990 Steiner Corporation-Milwaukee, Wisconsin and Chicago, Illinois  
(*American Industrial Service Division*)

**ASSISTANT PRODUCTION MANAGER** (1988-1989) for this privately held international industrial textile firm with annual sales of \$700 million. Supervise a 17 person production crew; hold accountability for maximizing employee productivity and ensuring smooth work flow.

**MANAGER- Office Administration / Electronic Data Processing / Credit and Collections / Personnel / Safety / Legal Liaison** (1986-1988). Primary responsibilities encompassed the administration of a \$250,000 budget in directing office operations and supervising both the EDP and Accounting departments.

### **MILITARY EXPERIENCE**

1976-1984 United States Navy, United States Naval Reserve

**SECOND CLASS PETTY OFFICER.** Promoted through positions of increasing scope and authority during Persian Gulf and Southeast Asian deployments. Honorable Discharge.

### **EDUCATION**

1981-1984 University of Wisconsin - Green Bay

**Bachelor of Arts in Economic (International).**

**Bachelor of Arts in Business (Management).**

### **COMMUNITY INVOLVEMENT**

2009-present Member Bay View Business Association, sponsor Bay View Maytag Laundromat Night at Chill on the Hill, Humboldt Park, June 2009 for the Bay View Neighborhood Association.

**NOTICES SENT TO FOR FILE: 091510**

[illegible]



## Legislation Details (With Text)

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**File #:** 091511      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/2/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of Michael Marx to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor.

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 44

**Attachments:** Appointment Letter, Resume, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/2/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091511

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of Michael Marx to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor.

**Drafter**

Mayor

TB

3/2/10

March 2, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to make the following appointments to the Business Improvement District Board #44  
(Kinnickinnic Avenue):

William F. Doyle  
3042 South Wentworth Avenue  
Milwaukee, Wisconsin 53207  
(1-Year Term)

Steven M. Ste. Marie  
6155 North Shoreland Avenue  
Whitefish Bay, Wisconsin 53217  
(2-Year Term)

Jake M. Provan  
1410 Gabriel Drive - #5  
Waukesha, Wisconsin 53188  
(1-Year Term)

Michael M. Marx  
1630 East Decorah Road  
West Bend, Wisconsin 53095  
(2-Year Term)

Greg Mertens  
2800 West Lincoln Avenue  
Milwaukee, Wisconsin 53215  
(1-Year Term)

Jason C. Wedesky  
2983 South Superior Street  
Milwaukee, Wisconsin 53207  
(3-Year Term)

Ron Romero  
2768 South Lenox Street  
Milwaukee, Wisconsin 53207  
(1-Year Term)

Michael B. Krolick  
16325 West Marietta Drive  
New Berlin, Wisconsin 53151  
(3-Year Term)

Joyce Parker  
2685 South Kinnickinnic Avenue  
Milwaukee, Wisconsin 53207  
(1-Year Term)

To the Honorable, the Common Council

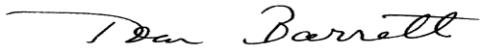
Page 2

March 2, 2010

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and Common Council File 090559. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in cursive script that reads "Tom Barrett". The signature is written in dark ink and is positioned to the left of the printed name.

Tom Barrett

Mayor

Michael M. Marx

1630 East Decorah Road  
West Bend WI 53095

Experience

1958-1962      U.S.A.F.  
Motor Pool Heavy Mechanic

1962-1973  
Braeger Chevrolet Milwaukee, Wi  
Member of Legion of Leaders

1973-1985  
Active Real Estate Broker  
Owner of Bay Homes Realty in Bay View Milwaukee

1985-2009  
Property Management and Brokerage Services

2010  
Commercial Brokerage Services

Education

Real Estate, Financial Services, Insurance Loss Control, Agriculture,

Interests

Farming, Dog Training, Horse Handling, Camping, Conservation, Travel

Community  
Involvement

Member of Lafayette Lodge No. 265 Milwaukee  
Past Member of Kiwanis and Rotary Clubs



**NOTICES SENT TO FOR FILE: 091511**

[illegible]



## Legislation Details (With Text)

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**File #:** 091509      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/2/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of Joyce Parker to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor. (14th Aldermanic District)

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 44

**Attachments:** Appointment Letter, Resume, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/2/2010	0	COMMON COUNCIL	ASSIGNED TO		
4/1/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
4/1/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091509

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of Joyce Parker to the Business Improvement District Board #44 (Kinnickinnic Avenue) by the Mayor. (14th Aldermanic District)

**Drafter**

Mayor

TB

3/2/10

March 2, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to make the following appointments to the Business Improvement District Board #44  
(Kinnickinnic Avenue):

William F. Doyle  
3042 South Wentworth Avenue  
Milwaukee, Wisconsin 53207  
(1-Year Term)

Steven M. Ste. Marie  
6155 North Shoreland Avenue  
Whitefish Bay, Wisconsin 53217  
(2-Year Term)

Jake M. Provan  
1410 Gabriel Drive - #5  
Waukesha, Wisconsin 53188  
(1-Year Term)

Michael M. Marx  
1630 East Decorah Road  
West Bend, Wisconsin 53095  
(2-Year Term)

Greg Mertens  
2800 West Lincoln Avenue  
Milwaukee, Wisconsin 53215  
(1-Year Term)

Jason C. Wedesky  
2983 South Superior Street  
Milwaukee, Wisconsin 53207  
(3-Year Term)

Ron Romero  
2768 South Lenox Street  
Milwaukee, Wisconsin 53207  
(1-Year Term)

Michael B. Krolick  
16325 West Marietta Drive  
New Berlin, Wisconsin 53151  
(3-Year Term)

Joyce Parker  
2685 South Kinnickinnic Avenue  
Milwaukee, Wisconsin 53207  
(1-Year Term)

To the Honorable, the Common Council

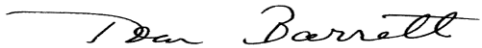
Page 2

March 2, 2010

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and Common Council File 090559. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in cursive script that reads "Tom Barrett". The signature is written in dark ink and is positioned to the left of the printed name.

Tom Barrett

Mayor

**NAME**

Joyce Parker

**Experience**

1980-present Milwaukee Symphony Orchestra

**Fashion Show Coordinator**

- Full organization and coordination of fashion shows for Milwaukee Symphony Orch. concerts.
- Works with marketing manager of MSO to boost concert attendance via fashion shows.

2003-present Joyce Skylight Court properties

**Rehab and Property Development**

- Complete rehabilitation of property at 2680 S. Kinnickinnic Avenue into commercial rentals
- Development of indoor shopping center (4 units + common area)
- High standard of building presentation will elevate entire neighborhood.

1994-present Music Management Booking Services

**Music Booking Agent**

- Talent booking (music, theatre & fashion) for private occasions and select venues.
- Audition, assembly of performance groups to client specifications.
- Dependable high standard of performance for discriminating clients.

1992-present Music on KK Community Concert Series

**Director of Operations**

- Established and organization for Weekly FREE community concert series.
- Board Chair for 501c3 Music on KK
- Regular highly supportive audience of neighborhood residents

1998-2000 Mixed residential/commercial development 2681 S Kinnickinnic Ave

**Rehab and Property Development**

- Complete rehabilitation of former dry cleaner business into mixed res/com
- Development of lower business space and two upper apartments
- Provides opportunities for beginning businesses, and classy housing to single professionals

2002-2006 Bay View Village Dance Factory

**Owner/Operator of dance instruction facility**

- Created instructional facility with suspended floor for beginning and intermediate dance classes
- Coordinated instructors, class schedules, etc.
- Provided a service for dance education

1988-1994 2685 South Kinnickinnic Avenue

**Rehab and Property Development of former bank building**

- Complete rehab of bank building into instructional and performance facility
- Fashion Modeling School instructional facility
- Performance area for concerts, theater, and community events
- Creation and Rehabilitation of apartment spaces within building.

1994-2006 Theatre on KK

**Director of operations for community theatre group.**

- Furnished a facility for theater rehearsals and presentations, especially youth.
- Casting, costumes, rehearsals, direction, publicity, staging, etc.
- Afforded a neighborhood outlet for theatrical aspirations of the community.

1960-1990      Rosemary Bischoff Studios

**Professional Fashion Modeling Instructor**

- Individual modeling instruction and counseling
- Instruction of new modeling teachers
- Fashion lectures
- Fashion show commentary

1960-1990      Marshall Field, Boston Store, etc.

**Fashion Model in Milwaukee and Chicago areas**

1980-1985      Wool Bureau & Leather Industry

**Representative of National Mfr. Assoc. & Fashion Designers for Wool and Leather clothing & accessories**

1980-1990      Tahlia Chamber Music Artists

**Manager of Performance Ensemble, bookings, venues, etc.**

1992-1993      Milwaukee Chamber Orchestra

**Manager, engagements, funding, etc.**

1955-1960      First Wisconsin Bank, Bay View

**Head Bank Teller - Now owns the building (see above)**

## Continuing Education and Interests

1980-1985      Interlochen, Michigan. Chamber Music Camp - Advanced music instruction

2008-present      UW-Milwaukee, Accelerated Study of Spanish Language

The betterment of the neighborhood is the essence of the term "Community Development" .  
Improvement of my surroundings has always been uppermost in my mind and continues to be my standard.

**NOTICES SENT TO FOR FILE: 091509**

[illegible]





## Legislation Details (With Text)

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**File #:** 091593      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/24/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of Frank Giuffre to the Business Improvement District Board #43 (South 27th Street) by the Mayor. (13th Aldermanic District)

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 43

**Attachments:** Appointment Letter, Biography Pages, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/24/2010	0	COMMON COUNCIL	ASSIGNED TO		
4/1/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
4/1/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091593

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of Frank Giuffre to the Business Improvement District Board #43 (South 27<sup>th</sup> Street) by the Mayor. (13th Aldermanic District)

**Drafter**

Mayor

dkf

3/24/10

March 24, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to appoint the following persons to the Business Improvement District Board No. 43 (South 27<sup>th</sup> Street Business District Association):

Jeffrey Steren (1-year term)  
5354 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

David Bardon (1-year term)  
4040 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Frank Giuffre (2-year term)  
3804 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Milan Kresovic (2-year term)  
5790 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Rodney Reider (3-year term)  
2900 West Oklahoma Avenue  
Milwaukee, Wisconsin 53215

Thomas Bernacchi (3-year term)  
3700-3750 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and Common Council File Number 090560. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in cursive script that reads "Tom Barrett".

Tom Barrett  
Mayor

## **Frank Giuffre President, Mallory Properties**

People who buy distressed real estate have been characterized by the local media as "bottom feeders" and "vultures." But Mallory Properties President Frank Giuffre would seem to be anything but. Giuffre, who with his brother Dominic owns Mallory Properties, has a history of buying distressed commercial and industrial buildings and transforming them into marketable properties. "He is a redeveloper - a visionary type of guy," says Barry Chavin of MLG Commercial. "Frank looks for properties that have an upside," Chavin said. "He looks for buildings that are challenged - some might call them distressed. Frank is a character, and he tries to put character into the building. He is the ultimate marketer and salesman."

The Giuffre brothers' business holdings currently include not only Mallory Properties, but their crane rental and sales operation, a finance division started to help contractors and other buyers finance their cranes, a marina facility in Florida and other entities.

"Our first development was a building we utilized ourselves in 1967 in Cudahy," Giuffre said. "We built a shop for our cranes."

"Next, we built a multi-tenant building," Giuffre said. "We were in the process of looking for tenants when a single tenant came along - a telephone company - AT&T it would have been 35 years ago - and they used the whole thing. So we built another building and it went on from there. It evolved slowly. I was more active in the development end of it, and my brother was more active in the crane end of it."

"The first rehab we did was a car dealership in South Milwaukee," Giuffre said. "We converted it into a Wonderbread discount store. That was our first venture into rehab. I enjoyed that. I liked doing that. I thought I knew what the potential was and it worked out pretty well. We rehabbed a couple of Firestone stores -- both were turned into auto body shops. And I think the first large project was 25th and St. Paul. That was an old gasification works owned by the gas company. It's an 8-sided tower in the Menomonee Valley - 200,000 square feet. We turned it into warehousing and transportation." Giuffre bought an additional 12.5 acre tract south of St. Paul Avenue and west of the 16th Street Viaduct - adjacent to the former gasification plant. The deal includes 30,000 square feet of building space - making Giuffre one of the largest property owners in the Menomonee River Valley. "Our most significant one now is the Oster Building," Giuffre said, referring to the facility at 5301 North Ironwood Lane in Whitefish Bay. "The unique thing about that

building is that it was an old industrial building - vacant - and had some environmental problems. It was a location suitable for office or retail." Giuffre bought the property in 1995, and things started to happen. "We brought in some warehousing people," he said. "We used it as a warehouse, and then we made our contact with Manpower - which was a natural because they were neighbors. The building lent itself to rehab - the column spacings were right, the ceiling spacings were right - it had the right amount of plumbing. It had adequate parking - you need more parking per square foot for an office development than an industrial property. It had all the elements of a conversion. We negotiated long-term leases and rehabbed the space."

But as much as Giuffre likes the Oster building, his favorite project is still a combination swap/purchase deal he put together with compressor manufacturer Vilter Manufacturing in 1994. Giuffre had bought and rehabbed former Ladish Co. facilities on Packard Avenue. Giuffre leased the space to machinery clients until trading the building to Vilter for Vilter's own 1st Street facility, just south of downtown Milwaukee, and an undisclosed amount of cash. What it takes - "One thing these buildings all had in common was they had some type of environmental problem - or brownfields issues," Giuffre said. "One reason that we have been able to acquire these buildings is that we have an environmental remediation company. We like to buy buildings that are environmentally challenging."

The ability to buy the whole enchilada gives Mallory a natural negotiating advantage, Giuffre said. "Machinery people aren't interested in real estate and real estate people aren't interested in machinery or ongoing businesses."

**NOTICES SENT TO FOR FILE: 091593**

[illegible]



## Legislation Details (With Text)

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**File #:** 091595      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/24/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of Rodney Reider to the Business Improvement District Board #43 (South 27th Street) by the Mayor. (8th Aldermanic District)

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 43

**Attachments:** Appointment Letter, Resume

Date	Ver.	Action By	Action	Result	Tally
3/24/2010	0	COMMON COUNCIL	ASSIGNED TO		

**Number**

091595

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of Rodney Reider to the Business Improvement District Board #43 (South 27<sup>th</sup> Street) by the Mayor. (8th Aldermanic District)

**Drafter**

Mayor

dkf

3/24/10



March 24, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to appoint the following persons to the Business Improvement District Board No. 43 (South 27<sup>th</sup> Street Business District Association):

Jeffrey Steren (1-year term)  
5354 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

David Bardon (1-year term)  
4040 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Frank Giuffre (2-year term)  
3804 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Milan Kresovic (2-year term)  
5790 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Rodney Reider (3-year term)  
2900 West Oklahoma Avenue  
Milwaukee, Wisconsin 53215

Thomas Bernacchi (3-year term)  
3700-3750 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and Common Council File Number 090560. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in cursive script that reads "Tom Barrett".

Tom Barrett  
Mayor

## **RODNEY DEAN REIDER**

691 Broadmoor Drive  
Blue Bell, Pennsylvania 19422

rdreider@earthlink.net  
home: 610/278-1049  
cell: 215/692-3595

### **EXPERIENCE**

#### **Spectrum Health Partners, LLC – July 2006 to present**

##### **Consultant**

Brentwood, Tennessee

Perform specialization work in financial and operational performance improvement services for the healthcare industry. This has included merger and acquisitions, management transitions and financial operations.

#### **Community Health Systems/University of Pennsylvania Health System – May 2005 to May 2006**

##### **President/Chief Executive Officer**

Chestnut Hill Health System · Philadelphia, Pennsylvania

Administer all aspects of a 2 campus urban and suburban health system (Net Revenue: \$413M) which includes an acute care hospital, independent and assisted living, rehabilitation hospital, geropsych, adult daycare, women's health center and physician clinics. Total bed capacity: 416. Residencies in Surgery, Internal Medicine, Family Practice, Obstetrics & Gynecology and Podiatry are also coordinated throughout the health system.

- Instituted a team approach focusing the health system on quality, financial and operational processes to improve patient care and financial viability.
- Worked with Board, physicians, employees and community to develop a facility master plan to address current as well as future needs [\$100M].
- Develop, negotiate and monitor clinical programs, residencies and affiliations with University of Pennsylvania Health System, Temple University, Thomas Jefferson University and Einstein Medical Center.
- Led Board and Physician Leadership Retreat, setting up strategic and business plans for Years 1-3.
- Successfully recruited the following physicians:
  - ❖ University of Pennsylvania: Chair(s) – Department of Surgery, Department of Obstetrics and Gynecology, and Physical Medicine and Rehabilitation.
  - ❖ Primary Care – four Family Practice physicians and three Internal Medicine physician.
  - ❖ Surgical – one Orthopedic Surgeon, four OB/GYN physicians, one general surgeon, one general/colorectal surgeon and one vascular surgeon.
  - ❖ Specialty Care – one endocrinologist and one rheumatologist.
- Identified potential strategies for growth, physician placement, practice acquisition and JV partnerships.
- Recruited established gynecologist and partnered with physicians to increase efficiencies and access to offices increasing Chestnut Hill OB/GYN monthly visits by 17 percent since August.
- Implemented PACS/digital IT throughout health system and instituted Mysis Electronic Medical record in primary care clinics to enhance quality patient care/physician satisfaction.
- Completed numerous facility enhancements/renovations including but not limited to the following: Renovation of two med/surg floors, new physician lounge and dining room, modification to ECHO room, new stereotactic room at Women's Center; expanded telemetry bed capacity.
- Reduced ED diversion status from 700 hours to zero (48,000 visits) and established hospitalist program.
- "Door to Door" Community Support Campaign at Chestnut Hill.

## **RODNEY DEAN REIDER**

### **Mercy Health Partners – January 2002 to May 2005**

#### **President/Chief Executive Officer**

Mercy Franciscan Hospital – Mt. Airy, Cincinnati, Ohio – January 2002 to May 2005

Mercy Franciscan Hospital – Western Hills, Cincinnati, Ohio – March 2003 to March 2004

Managed operations for a 297-bed facility and a 248-bed facility including a university residency program and freestanding clinics. This led to a financial improvement at both hospitals; in fact, the first profitable year for one site (in 7 years) and improved the other by 30% while improving market share at both.

- Net revenue approximately \$200M with approximately 1700 FTEs as a two hospital President/CEO.
- Spearheaded operational improvement plans and controls that led to a financial turnaround from an \$11M and \$14M loss to 16 consecutive profitable months and the first profitable year in 7 years.
- 15 percent volume growth in three years [acute discharges] in a non-expanding population market, through quality/safety focus and working with physicians while also establishing a high quality hospitalist program.
- Maintain only diversion free hospital in Cincinnati (40,000+ visits) while increasing employee satisfaction.
- Developed a shared governance model with both medical staffs, establishing leadership teams at both sites.
- Partnered with physicians to implement John Hopkins' C-PORT (primary angioplasty) program. This was the first hospital and the first program of its kind in the state of Ohio.
- Succeeded at regaining physician support for their community hospital by building relationships and problem-solving to improve quality of care and patient satisfaction; thus, increasing physician satisfaction.
- Partnered with physicians to develop new programs including "Vidas Preciosas" which introduces and provides prenatal care/delivery services to the underprivileged in the Hispanic community.
- Employer of choice with nursing vacancy rates decreasing from 31% to 11%.
- Advocated implementation of CPOE at both campuses to enhance quality care/improve physician satisfaction.
- Promoted an IT SSL VPN; the network of 18 greater Cincinnati hospitals, nursing homes and their physicians could access clinical reports for one portal, rather than having to search numerous proprietary portals. Everyone benefited from an operational process, quality and practical cost aspect. (HealthBridge)
- Regional sponsor for the following initiatives: (1) Quality and (2) Ease of Use/Access. Member of MHP system-wide Finance and Strategic Planning Committee of the Board of Directors.
- Developed and raised money for a \$2.8M Emergency Department expansion and \$1.2M Angiography suite.
- Oversaw family practice and surgical residencies with the University of Cincinnati.
- Developed a community advisory committee to attain community issues and set priorities at both sites including local leaders, business and church leaders and state representatives reigniting community passion.
- Instituted a Senior Link Network to better serve the elderly in the community.
- Established Mt. Airy Hospital as the spiritual benchmark for all of Catholic Healthcare Partners, by promoting our mission and spirituality in the workplace.
- First graduate class of Leadership Academy through Center for Creative Learning sponsored by CHP. Later appointed by Catholic Healthcare Partners to be a Committee Member for Leadership Academy selection.
- Instituted Studer training program.
- Past member, Greater Cincinnati Chamber of Commerce
- Past Member, Colerain Township Business Association.

## **RODNEY DEAN REIDER**

- Developed and oversaw a \$24 million turnaround plan for a three hospital system.
- Utilizing computer information systems and PDAs for MDs and RNs, automated medical records electronically.

### **Memorial Health System - Associate Administrator/COO**

Saddleback Memorial Medical Center, Laguna Hills, California – December 1993 to December 1996

Managed the operations for 223-bed acute care facility with 950 FTEs. During the first year served as the acting CFO/Director of Decision Support handling all financial reporting and budgeting. The second and third years served in the Chief Operating Officer role. Developed and implemented systems and controls that led to a financial turnaround from an \$11M and \$7M loss to a profit of \$4.1M. Established strategic development and business plans while working with the community on programs to maintain the hospital's role as a community asset. Worked with UCI in OB/Gyn residency programs for placement and oversight.

### **AMI - Director of Program Development/Operations**

Irvine Medical Center, Irvine, California – December 1991 to December 1993

Board member and project leader with University of San Diego joint ventures and Univ of Calif – Irvine faculty.

Various full-time positions with leading companies including Adventist Health/Corona Community Hospital (4 years), advertising agency and manufacturing while completing graduate degrees.

## **EDUCATION**

- **Masters in Business Administration – Finance and Marketing** - Loma Linda University.
- **International Scholar** - Curtin University, Western Australia – International Business
- **Masters of Science in Physiology/Kinesiology** - Cal Poly Pomona.
- **Bachelor of Arts** - Chapman University.
- **International Scholar** in Salzburg, Austria - University of Redlands.

## **ADDITIONAL INFORMATION**

While utilizing my Fellowship Grant, I traveled extensively throughout China, Hong Kong, New Zealand, Fiji, Thailand and Australia. In addition, I lived, traveled and studied in Eastern and Western Europe as recipient of my International Scholarship. These opportunities enabled me to gain a deeper understanding and appreciation of different cultures in all walks of life.

- Established healthcare business ventures with large employers in Western Australia
- Served as Paul Harris Fellowship "International Ambassador of Goodwill" recipient for Rotary International – speaking and promoting American interests and positive attributes overseas.

## **HONORS AND MEMBERSHIPS**

- Diplomat (CHE), American College of Healthcare Executives.
- HFMA, Member
- Graduate CHP Leadership Academy, Center for Creative Learning.
- Member, Chestnut Hill Historical Society, Chestnut Hill Community Association
- Gold Member, Fine Arts Fund.
- Received Leadership Award from National Committee for meritorious leadership and initiative from the Louisiana Committee - Support of the National Guard and Reserve.



## Legislation Details (With Text)

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**File #:** 091594      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/24/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of Milan Kresovic to the Business Improvement District Board #43 (South 27th Street) by the Mayor. (13th Aldermanic District)

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 43

**Attachments:** Appointment Letter, Resume, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/24/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091594

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of Milan Kresovic to the Business Improvement District Board #43 (South 27<sup>th</sup> Street) by the Mayor. (13th Aldermanic District)

**Drafter**

Mayor

dkf

3/24/10

March 24, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to appoint the following persons to the Business Improvement District Board No. 43 (South 27<sup>th</sup> Street Business District Association):

Jeffrey Steren (1-year term)  
5354 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

David Bardon (1-year term)  
4040 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Frank Giuffre (2-year term)  
3804 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Milan Kresovic (2-year term)  
5790 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Rodney Reider (3-year term)  
2900 West Oklahoma Avenue  
Milwaukee, Wisconsin 53215

Thomas Bernacchi (3-year term)  
3700-3750 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and Common Council File Number 090560. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in cursive script that reads "Tom Barrett".

Tom Barrett  
Mayor

**Milan B. Kresovic • 5790 South 27<sup>th</sup> Street • Milwaukee, Wisconsin 53221**

**Office: 414-282-1300      Cell: 262-312-8355      Email: [mkresovic@cameocarecampus.com](mailto:mkresovic@cameocarecampus.com)**

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**Work Experience:**

**Cameo Care Campus, Inc.**

11/2008 – *Present* – Compliance Director/Nursing Home Administrator

- Participate in oversight of Campus operations

**Insurance Broker, Mutual of Omaha, Milwaukee, WI.**

11/2005 – 12/2008

- Assisting individuals with achieving their insurance needs.

**District Manager, UGA Association Services, Delafield, WI.**

10/2005 – 11/2006

- Assisted Field Representatives with training, sales and operational management.
- "Quick Start" Award winner in Sales.

**Financial Marketing Manager, MPI Coin, Grafton, WI.**

8/01/2004 – 11/01/2005

- Account Manager for 600 Financial Institutions nationwide.

**Vice President-Operations, Bell Ambulance, Inc., Milwaukee, WI.**

6/2001- 7/2004

- Operations, Billing, Human Resources.

**Assistant Administrator, Cameo Care Center, Inc., Milwaukee, WI.**

5/1994 – 6-2001

- Oversee various aspects of facility operations.

**Human Resource Manager, Cameo Care Center, Inc., Milwaukee, WI.**

4/1984 – 6/1994

- Managed Human Resources program for 150 employees.
- 

**Education:**

**Iowa Central College**

Currently Enrolled in Healthcare Management Course

**University of Wisconsin – Madison:**

Nursing Home Administrator Course – 11/2008 - 11/2009

**Senior Living University :**

Level 1 Administrator Course – 03/2009 - 08/2009

**University of Wisconsin – Milwaukee**

Business Administration Coursework – 09/81 – 06-84



**NOTICES SENT TO FOR FILE: 091594**

[illegible]



## Legislation Details (With Text)

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**File #:** 091592      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/24/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of David Bardon to the Business Improvement District Board #43 (South 27th Street) by the Mayor. (13th Aldermanic District)

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 43

**Attachments:** Appointment Letter, Resume, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/24/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091592

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of David Bardon to the Business Improvement District Board #43 (South 27<sup>th</sup> Street) by the Mayor. (13th Aldermanic District)

**Drafter**

Mayor

dkf

3/24/10

March 24, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to appoint the following persons to the Business Improvement District Board No. 43 (South 27<sup>th</sup> Street Business District Association):

Jeffrey Steren (1-year term)  
5354 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

David Bardon (1-year term)  
4040 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Frank Giuffre (2-year term)  
3804 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Milan Kresovic (2-year term)  
5790 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Rodney Reider (3-year term)  
2900 West Oklahoma Avenue  
Milwaukee, Wisconsin 53215

Thomas Bernacchi (3-year term)  
3700-3750 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and Common Council File Number 090560. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in cursive script that reads "Tom Barrett".

Tom Barrett  
Mayor

### **David L. Bardon BIO**

Graduated from University of Wisconsin-Green Bay with a B.S. degree in Environmental Chemistry and an M.S. in Environmental Science. Spent 1 year at Tecumseh Products Co. as a Pollution Control Chemist. Spent 8 years at Kohler Co; 5 years responsible for all environmental laboratory analysis and the last 3 years was responsible for all environmental compliance for all of Kohler Co.'s domestic operations. Left Kohler Co. in 1985 to start a hazardous waste transportation and remediation business in conjunction with E & K Hauling. Grew company from ~\$100,000 in sales first year to well over \$9 million by 1992. In 1993 the E & K companies joined several other Wisconsin waste management companies to become Superior Services. At that time he became President of the Hazardous Waste Division with sales over \$20 million. The goal of the waste company consolidation was to go public and that we did in March, 1996. Left Superior in 1994 to pursue other interests.

Throughout his career as environmental professional, David maintained an active role in the bowling industry. David's father built Anchor Lanes in 1975. David and his wife Janell purchased Anchor Lanes in 1993 while David was still in running his hazardous waste company. In 1996, the Bardons decided to go into bowling full-time. Since acquiring Anchor Lanes, David and Janell have purchased four other centers: JB's Entertainment Center (1997); Odyssey Fun Center (1998); Super Bowl (1998) and Olympic Lanes (2002).

### **Bardon Bowling Centers (BBC) (present full-time business)**

<b><u>Company Name</u></b>	<b><u>Number of Lanes</u></b>
Anchor Lanes, Elkhart Lake, WI	12 Lanes
JBs' Entertainment Center, Howards Grove WI	12 Lanes
Odyssey Fun Center, Sheboygan Falls, WI	16 Lanes
Olympic Lanes, Milwaukee, WI	36 Lanes
Super Bowl, Appleton, WI	<u>48 Lanes</u>
Total:	124 Lanes

David also operates Bardon Enterprises, a chemical and janitorial supply company with his son.

**NOTICES SENT TO FOR FILE: 091592**

[illegible]



## Legislation Details (With Text)

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**File #:** 091596      **Version:** 0

**Type:** Appointment      **Status:** In Committee

**File created:** 3/24/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Appointment of Thomas Bernacchi to the Business Improvement District Board #43 (South 27th Street) by the Mayor. (13th Aldermanic District)

**Sponsors:** THE CHAIR

**Indexes:** APPOINTMENTS, BUSINESS IMPROVEMENT DISTRICT 43

**Attachments:** Appointment Letter, Resume, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/24/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091596

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Appointment of Thomas Bernacchi to the Business Improvement District Board #43 (South 27<sup>th</sup> Street) by the Mayor. (13th Aldermanic District)

**Drafter**

Mayor

dkf

3/24/10



March 24, 2010

To the Honorable, the Common Council  
of the City of Milwaukee

Honorable Members of the Common Council:

I am pleased to appoint the following persons to the Business Improvement District Board No. 43 (South 27<sup>th</sup> Street Business District Association):

Jeffrey Steren (1-year term)  
5354 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

David Bardon (1-year term)  
4040 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

Frank Giuffre (2-year term)  
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Milwaukee, Wisconsin 53221

Milan Kresovic (2-year term)  
5790 South 27<sup>th</sup> Street  
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Rodney Reider (3-year term)  
2900 West Oklahoma Avenue  
Milwaukee, Wisconsin 53215

Thomas Bernacchi (3-year term)  
3700-3750 South 27<sup>th</sup> Street  
Milwaukee, Wisconsin 53221

These appointments are pursuant to Section 66.1109 of the Wisconsin State Statutes and Common Council File Number 090560. The terms will commence upon taking of the oath of office.

I trust these appointments will have the approval of your Honorable Body.

Respectfully submitted,

A handwritten signature in cursive script that reads "Tom Barrett".

Tom Barrett  
Mayor

## **Thomas G. Bernacchi**

Thomas G. Bernacchi, CPM is Vice President and Chief Operating Officer of Towne Investments (Towne Realty, Inc.), a division of Zilber, Ltd.

Mr. Bernacchi has worked in the field of commercial real estate, leasing, development, and management for over 30 years. He has a BBA from the University of Wisconsin. He is a licensed real estate broker in the State of Wisconsin. Mr. Bernacchi is a charter member and past President of the Commercial Association of Realtors® Wisconsin. Mr. Bernacchi is a Certified Property Manager and was actively involved with the Institute of Real Estate Management (IREM), where he served as a national Governing Councilor for eight years and Regional Vice President of Region 9 for two years. In addition to his association with IREM and CARW, Mr. Bernacchi is active in the Building Owners and Managers Association (BOMA), past President of the Wisconsin Chapter of the NAIOP, past President of downtown Milwaukee's Westtown Association, a Director of the Milwaukee Riverwalk BID #15, Vice Chairman of Milwaukee's Alliance for Downtown Parking and Transportation and is the Chairman of the Board of Milwaukee Downtown BID #21.

Mr. Bernacchi and his wife, Terri, have been married for 34 years and have three children.

**NOTICES SENT TO FOR FILE : 091596**

[illegible]



## Legislation Details (With Text)

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**File #:** 091401      **Version:** 0

**Type:** Communication-Report      **Status:** In Committee

**File created:** 2/9/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Communication from the Brewery Project LLC relating to a 2009 progress report.

**Sponsors:** THE CHAIR

**Indexes:** NEIGHBORHOOD IMPROVEMENT DISTRICT #1, REPORTS AND STUDIES

**Attachments:** The Brewery Progress Report, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
2/9/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

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**File #:** 091401      **Version:** 0

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**Number**

091401

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Communication from the Brewery Project LLC relating to a 2009 progress report.

**Requestor**

**Drafter**

CC

dkf

2/9/10



# THE BREWERY

A Joseph J. Zilber Historic Redevelopment



## *Officers of Brewery Project LLC*

---

*Joseph J. Zilber,  
Chairman of the Board  
and Owner*

*John W. Kersey,  
President*

*Thomas G. Bernacchi,  
Vice President*

*Stephan J. Chevalier,  
Vice President*

*Daniel J. McCarthy,  
Vice President*

*Michael P. Mervis,  
Vice President*

*James B. Young,  
Vice President &  
General Counsel*

## *Construction Officers*

---

*Donald A. Mantz,  
President  
KM Development Corp.  
Supervising Executive*

*James C. Theusch,  
Executive Vice President  
KM Development Corp.  
Director of Construction*

*Kevin Mantz,  
Architect  
KM Development Corp.  
Director of Design*

*Gary Condon,  
Project Superintendent*

February 2010

This is our fourth progress report for the Brewery Project LLC, the historic adaptive reuse of the former Pabst Brewing site in downtown Milwaukee.

2009 was a year of great success at the Brewery. Highlights included; the complete rent up of Pabst Blue Ribbon Lofts, (the former Keg House, Building 9), developed by Gorman & Company of Madison, Wisconsin, the lease up of the Boiler House (Building 10), developed by PBH Redevelopment LLC and the opening of Cardinal Stritch University's College of Education and Leadership in Building 14, (the former Research Lab), which has been developed by BC Pabst Holdings LLC. In each and every case, the developers of the buildings and the tenants are extremely pleased with their historic and sustainable buildings.

Although I was unable to attend, the Brewery management team, along with elected officials and community leaders dedicated Zilber Park, one of the most unique urban parks ever developed. The park includes a gabion wall, which has transformed itself into a fascinating ice sculpture for the winter. The park is also part of the Brewery Project's highly advanced storm water management system, with storage directly underneath the park, which is capable of holding up to 100,000 gallons of storm water at peak capacity.

In December we received notification from the U.S. Green Building Council that in collaboration with the Congress for New Urbanism and the Natural Resources Defense Council, it is awarding the LEED® for Neighborhood Development Pre-review Approval to The Brewery at the Platinum level. If you have not had an opportunity to tour all of these locations, I hope you will take a moment to see for yourself how historic preservation and sustainability can be combined for the benefit of our community.

I am also very excited about the opening of our 880-car parking facility at the corner of 9th Street and Juneau Avenue. This facility, which will be utilized by our present and future tenants, features all of the latest parking structure state of the art technology including; BETA LED lighting systems, automated pay stations, hands free monthly parking access, customer-friendly support services and convenient access to the Milwaukee County Court House, MATC, Police Administration Building, Aurora Sinai Hospital, Bradley Center and Cardinal Stritch University, as well as offices and apartments at the Brewery. As part of the grand opening promotion we are offering rates starting at 50¢ an hour with special rates for early bird and monthly parkers as well.

At the same time that the 880-car parking facility was coming online, the City of Milwaukee Department of Public Works and their contractors were completing the initial phase of paving and street lighting throughout the Brewery Project. The completion of this work marks the first time in almost 50 years that the east/west and north/south street grid in the Brewery has been connected to the city's street grid. This is the first and one of the most critical steps in reconnecting this neighborhood with the neighborhoods surrounding it in all directions. If it has been quite some time since you have driven through the Brewery, or if you have never had the opportunity to do so, I hope you will take a moment on your way to and from work, or during your lunch hour to stop by and drive the streets. You will see the wonderful progress that has been made, how the exterior of the buildings has been restored. I urge you to take an extra minute to view the gabion wall ice structure in Zilber Park and picture in your minds eye the wonderful transformation that has taken place in the last few years and imagine the spectacular changes that will occur in the next couple of years as we look at adding new tenants and new projects to what is already a successful undertaking.

The Brewery continues to exceed my commitment to the City regarding the implementation of the projects EBE/RPP goals. Enclosed is the latest certification information from Prism Technical Management and Marketing Services. The Brewery team firmly believes that it will continue to meet or exceed all of the goals I committed to when I entered into our partnership with the City.

My summer bout with pneumonia and my 92nd birthday are behind me, which allows me to look forward to celebrating my 100th birthday with a party at the Brewery. I am working diligently to achieve that goal. I hope you will be able to join me.

Cordially,



Joseph J. Zilber  
Chairman of the Board and Owner  
Brewery Project LLC

- ❖ Blue Ribbon Lofts, a 95 unit apartment building developed by Gorman and Company in the historic Keg House had its first tenant move in at the end of January 2009. The property is now fully leased.
- ❖ PBH Redevelopment completed the renovation of the historic Boiler House into a multi-tenant office building. The property is now home to 4 separate tenants including Inland Companies, American Medical Buildings, Albion Architects and The Planning Council. The property is 80% leased.
- ❖ BC Pabst Holdings LLC completed its renovation of the historic Lab Building and Annex. In May Cardinal Stritch University's School of Education and Leadership took occupancy of a majority of this space and began providing classes and related programming.
- ❖ The 80-stall surface Parking lot including its dedicated bioswales located on Block 6 of The Brewery was completed in January.
- ❖ WE Energies completed installation of the redundant loop electrical cable early in 2009. This completed the infrastructure backbone for electrical, natural gas and other utilities for the entire Brewery neighborhood.
- ❖ Construction work was completed and dedication of Zilber Urban Park was held in June 2009.
- ❖ Construction of the Block 4 Parking Structure was completed in November and began operations on December 7, 2009.
- ❖ All streets throughout the Brewery property were opened to the public on December 7, 2009. This was the first time in over 40 years that the public had unfettered access to this historic area. Street improvements including asphalt paving, new sidewalks including multiple landscaped bioswales for stormwater management, street trees, decorative harp style lighting and a reconstructed brick sidewalk in front of the historic Mill House and Brew House buildings located on N. 10 Street.
- ❖ The City notified Brewery Project LLC that federal stimulus funds were available for the construction of the round-about located at the eastern gateway to The Brewery.
- ❖ The State of Wisconsin Department of Natural Resources provided a letter of environmental closure for the northern portion of Block 6 on the property.
- ❖ Zilber Park was completed and dedicated in June, 2009. This 5,000 s.f. pocket park includes a gabion wall, concrete benches, perennial plantings and shade trees. Underneath Zilber Park is a 100,000 gallon underground stormwater retention basin.
- ❖ Brewery Project LLC hosted a number of professional associations and neighborhood group meetings at The Brewery and was the site for a highly acclaimed mobile workshop for the International Downtown Association's Annual conference which was held in Milwaukee.



## **Pabst brewery projects gets pre-approval LEED certification**

"The Brewery Project LLC, Zilber Ltd. founder Joe Zilber's mixed-use redevelopment of the former Pabst brewery in downtown Milwaukee, was notified by the U.S. Green Building Council that it has received pre-approval of platinum certification for LEED for Neighborhood Development, a new rating system designed to recognize large environmentally sustainable developments. The Brewery project includes a sophisticated storm water system with bioswales that capture roof top drainage and storm water runoff from the street system, water management containment areas and permeable pavement to allow water to go into the store water management system. "We are on track to receive the highest certification available under the new LEED for Neighborhood Development Program," said Brewery President John Kersey. "When Mr. Zilber bought the old Pabst brewery, he made a number of commitments to the city of Milwaukee and its citizens, to reestablish a great neighborhood in which to work, live and play, and to set the bar as high as possible for historic and sustainable development. As always he is fulfilling those commitments."

## Bioswales Photos



## Zilber Park dedicated today at The Brewery

"The first urban park specifically designed for an industrial neighborhood (that has quickly added residential, commercial and eventually retail) in the City of Milwaukee was dedicated today by Mayor Tom Barrett, members of the Wisconsin Preservation Fund and members of the Zilber family.

The park is part of The Brewery, which is being developed by local real estate executive and philanthropist, Joseph J. Zilber.

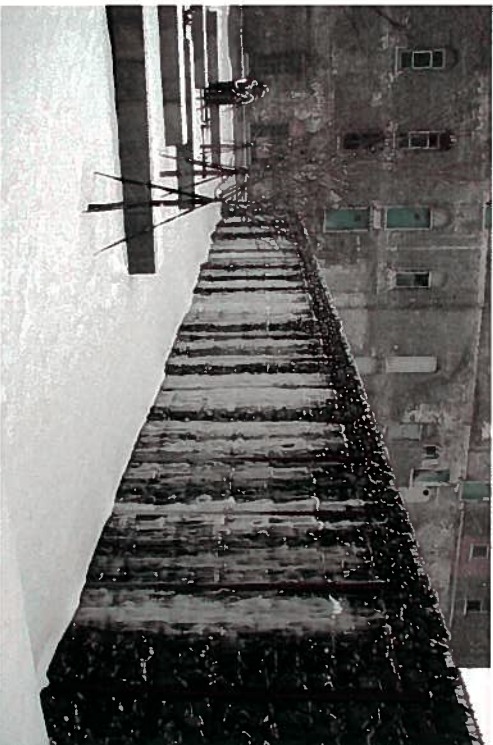
Zilber Park was designed by D.I.R.T. studio, the nationally acclaimed landscape architects who won the first UWM Urban Edge Award.

Prominently featured is a bronze 7-foot statue of Joseph and Vera Zilber created by Koh Varilla Guild of Chicago, a Gabion wall constructed of recycled steel, fractured granite boulders and integral water and lighting fixtures is designed to provide a gentle waterfall in summer and creates an ever changing ice sculpture during the winter months. The park also has a crushed granite walking surface and a large storm water retention basin underneath.

The park was funded by Zilber, a grant from the Wisconsin Preservation Fund, storm water management funding from the Milwaukee Metropolitan Sewerage District and the City of Milwaukee. It will be administered by the new neighborhood improvement district created to cover The Brewery Development. "



# Zilber Park Photos



## Brewery parking ramp open for business

"The \$16.5 million, 880-vehicle parking ramp at The Brewery development in downtown Milwaukee is open for business.

Owned by real estate developer and philanthropist Joseph Zilber, the parking structure at the corner of North Ninth Street and West Juneau Avenue has eight levels and is charging an introductory rate of 50 cents an hour or \$75 a month.

Construction workers at the Pabst brewery redevelopment project began working on the ramp in April. The parking structure was assembled with 700 pieces of precast concrete, weighing as much as 20 tons each."



## Parking Structure Photos



## Nonprofit planning council moving to The Brewery

"The Planning Council for Health and Human Services Inc. in Milwaukee is moving its offices to the historic Boiler Building at 1243 North 10th Street at The Brewery.

The Council will lease 4,100 square feet on the second floor of the renovated building at the corner of 10th and McKinley, which is adjacent to Zilber Park in the northwest corner of The Brewery project. The nonprofit group is now located at 1441 N. Farwell Ave.

The Council, which provides a range of planning, evaluation and research services designed to advance community health and human services, was incorporated in 1965. The agency plans to move into the Boiler Building in the fall.

"This setting is perfect for us to fulfill our mission of engaging the community in health and human services through planning, evaluation and research," said Kathleen Pritchard, executive director of the group.

The Planning Council transaction was brokered by Jennifer Green of CB Richard Ellis and Lyle Landowski of Inland Cos., both of whom are based in Milwaukee."

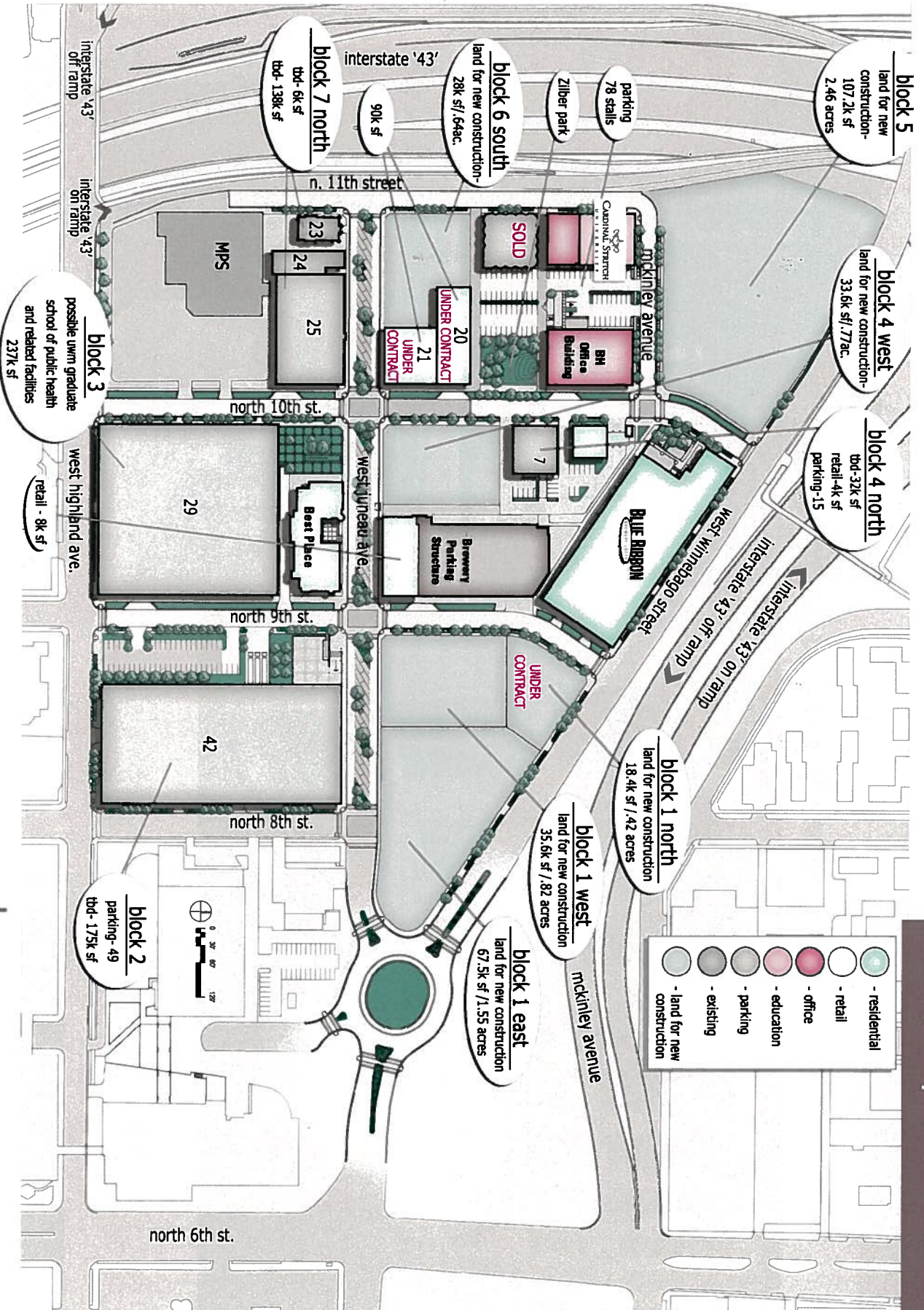


## Boiler House Photos





# Conceptual Site Plan



November 24, 2009

Ossie Kendrix  
EBE Program Manager  
City of Milwaukee  
City Hall, Room 606  
200 East Wells Street  
Milwaukee, WI 53202



Re: The Brewery / Demolition, Abatement and Infrastructure  
EBE and RPP Participation Quarterly Report  
Report # 11: Through September 30, 2009

Dear Mr. Kendrix:

Prism Technical is pleased to provide you with this updated report of Emerging Business Enterprise (EBE) and Residents Preference Program (RPP) participation performance on the demolition, abatement and infrastructure phase of The Brewery – the historic redevelopment of the former Pabst Brewery complex in downtown Milwaukee. This Report assesses EBE and RPP performance through September 30, 2009. Brewery Project LLC, KM Development Corp. and Prism Technical are fully committed to achieving – and where possible, exceeding -- 18% EBE and 21% RPP participation on this landmark project. The developer and construction manager have made the inclusion of Emerging Businesses a significant priority on this project, seeking insight from our firm and your department, and requesting EBE bids for all project work.

For this report, Prism Technical has verified documents regarding contractual documents, payment reports and payroll records provided by KM, principal contractor Brandenburg and principal environmental consultant Arcadis.

#### **RPP Participation**

Through September 30, 2009, a total of 130,141.4 construction site hours had been worked on the project. Of those hours, 30,777.5 were worked by individuals certified under the Residents Preference Program, yielding an **RPP Percentage of 23.7%**. The current level of RPP participation exceeds the final target (21%) and is on par with the projected RPP Percentage through project completion.

#### **EBE Participation**

KM Development took exceptional care throughout the project to locate opportunities for EBE participation, adding new Emerging Businesses when possible and encouraging the demolition and abatement contractor and environmental consultant to do the same. The EBE firms listed in the following table have contracts or purchase orders (including change orders) totaling a minimum of \$2,146,521.82.

#### **Prism Technical Management & Marketing Services**

6114 W Capitol Drive – Suite 200 Δ Milwaukee Δ Wisconsin Δ 53216  
Main Line: 414.847.0990 Δ Fax: 414.847.0992 Δ <http://www.prismservice.com>

The Brewery – EBE/RPP Report  
November 24, 2009 / Page 2 of 3

NAME OF EBE FIRM(S)	SERVICE PERFORMED / MATERIAL SUPPLIED	CONTRACT/ PO AMT	AMT PAID THROUGH 9/30/09
Advanced Enterprises Inc.	Plumbing	8,847.86	\$8,847.86
APB Security	Unarmed Security	21,000.00	\$20,880.00
Arteaga Construction, Inc.	Carpentry	77,117.04	\$88,430.43
Autumn Trucking	Diesel Fuel	76,500.00	\$483,350.09
Autumn Trucking (Gorman sub)	Diesel Supplies	TBD	\$5,179.18
B & D Contractors, Inc.	Carpentry	19,755.00	\$20,591.61
Braxton / Team Environmental	Asbestos Abatement/Universal Waste / Lead Paint Removal	78,764.00	\$82,964.00
CAM Recycling (formerly HMB)	Concrete Crushing	180,000.00	\$143,731.85
Cisco Distributing (Wil-Surge sub)	Concrete Coring	TBD	\$13,639.99
Con-Cor Company, Inc.	Concrete Coring	6,195.00	\$5,217.50
Consulting Training Services	PM/Waste	TBD	\$20,176.00
Dairyland Electric Co., Inc.	Electrical	TBD	\$108,951.60
Dean Gonzalez Trucking	Trucking	TBD	\$4,700.42
Enviro Tech	Trucking & Disposal	580,466.00	\$240,206.45
Franklin Trucking	Trucking – The Brewery	TBD	\$6,453.91
Franklin Trucking	Trucking – Pocket Park	TBD	\$4,714.58
Johnson Demolition & Concrete	Trucking & Disposal	TBD	\$12,990.00
Johnson Demolition & Concrete	Concrete Work (Gabion Wall)	TBD	\$19,460.00
Kapur & Associates, Inc.	Engineering Consultant (The Brewery)	TBD	\$23,957.86
Kapur & Associates, Inc.	Staking & Surveying (Pocket Park)	TBD	\$5,684.24
Kapur & Associates, Inc.	Professional Fees (Pocket Park)	TBD	\$44,984.11
Kapur & Associates, Inc (sub to Arnold & O'Sheridan)	Civil Engineering Services	TBD	\$34,060.00
Kitson Environmental Services	Geoprobe Drilling	TBD	\$1,071.25
L&A Drywall	Painting and Finishing	1,100.00	\$7,524.00
Marek Landscaping	Erosion Control	16,335.00	\$4,092.70
Masonry Specialists II, LLC	Masonry	147,215.00	\$150,670.00
McDowell Construction Corp.	Temporary Fence Installation	2,467.92	\$18,742.92
McDowell Construction Corp.	Fence Repair & Installation	3,150.00	\$3,150.00
Milwaukee Ironworks, LLC	Steel Erection	26,148.00	\$32,404.00
The Nisha Group, LLC	Field Office Cleaning	TBD	\$7,580.00
The Pennebaker Enterprises	Waterproof Roofing	2,450.00	\$8,161.00
Prism Technical	EBE/RPP Coord. / Reporting	TBD	\$59,171.10
Rodriguez Construction	Trucking	TBD	\$480.09
Sanchez Painting Contractors	Selected Painting Work	6,200.00	\$6,200.00
Sonag Ready Mix	Concrete	TBD	\$7,499.82
South Star Trucking	Granular Fill Material	TBD	\$157,377.36
South Star (Payne & Dolan sub)	Trucking	TBD	\$1,476.13
Valente Transport	T&D Aggregate Fill	TBD	\$340,504.66
Zenith Industrial Services	Asbestos Abatement/Universal Waste & Lead Paint Removal	892,811.00	\$828,089.72
<b>TOTAL EBE CONTRACTS / PAYMENTS</b>		Minimum: \$2,146,521.82	\$3,033,366.43

The Brewery – EBE/RPP Report  
November 24, 2009 / Page 3 of 3

Through September 30, project expenditures totaled \$17,707,524.04, with \$12,462,038.50 spent in those areas included in the adjusted construction costs. Of the latter amount, \$3,033,366.43 (as shown above), or 24.3%, was paid to EBE firms.

#### SUMMARY OF THE BREWERY PARTICIPATION

RPP participation is on track to meet the final target, with the percentage through September standing at 23.7%, representing over 30,000 hours by RPP workers. This is equivalent to over one year of full time employment for 20 residents of Milwaukee's Community Development Block Grant area. EBE firms have been paid over \$3 million, or 24.3% of total adjusted construction expenditures on the project.

With the project substantially complete, we are hopeful that its success will set a standard for all work done at the former Pabst Brewery complex and other developments in the City of Milwaukee.

If you have any questions related to this report or the attached documentation, please feel free to contact us.

Thank you,

  
Lafayette L. Crump



w w w . t h e b r e w e r y m k e . c o m



Main Office — 710 North Plankinton Avenue, Milwaukee, WI 53203 — (414) 274-2880 — Fax (414) 274-2718

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**NOTICES SENT TO FOR FILE: 091401**

[illegible]



## Legislation Details (With Text)

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**File #:** 091616      **Version:** 0

**Type:** Communication      **Status:** In Committee

**File created:** 3/24/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Communication relating to the Milwaukee Continuum of Care's report on the Ten-Year Plan to End Homelessness.

**Sponsors:** THE CHAIR

**Indexes:** REPORTS AND STUDIES, SOCIAL CONCERNS

**Attachments:** 10 Year Plan to End Homelessness, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/24/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		



**Number**

091616

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Communication relating to the Milwaukee Continuum of Care's report on the Ten-Year Plan to End Homelessness.

**Requestor**

**Drafter**

CC-CC

tb

3/30/10





MILWAUKEE CONTINUUM OF CARE

# **10-Year Plan to End Homelessness**



# Acknowledgements

## **Milwaukee Continuum of Care Steering Committee**

Tom Brophy, Director of Community Affairs  
Medical College of Wisconsin, Co-Chair

Steve Falek, Associate Director  
Housing Authority of the City of Milwaukee, Co-Chair

James Mathy, Special Needs Housing Manager  
Milwaukee County Department of Health and Human Services

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*The development of the 10-Year Plan was supported by a generous grant from the Greater Milwaukee Foundation.*

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**MILWAUKEE CONTINUUM OF CARE**

# **10-Year Plan to End Homelessness**

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## Milwaukee's 10-Year Planning Process

The Milwaukee Continuum of Care is the sponsoring entity of the 10-Year Plan to End Homelessness. The planning process was kicked off at a planning day held on November 12, 2008, attended by 136 representatives of emergency shelters, transitional housing, permanent supportive housing, meal programs, advocacy organizations, city, county and state government, faith community, business, civic organizations, and consumers.



The 10-Year Plan was led by four work group chairs: Tim Baack from Pathfinders who headed the Prevention and Emergency Services work group; Jeanne Lowry, RN, from Community Advocates who headed the Mental Health, Substance Abuse, and Support Services work group; Ken Schmidt, Hope House, who led the Economic Support and Employment work group; and Jim Mathy, Milwaukee County Housing Division, who managed the Permanent Housing Work Group.

The work groups were the focal point of the planning effort. Each work group utilized its own method for conducting research, evaluating alternative approaches, collaborating with key stakeholders, and developing and finalizing its recommendations. Behind the final recommendations included in this plan is extensive background work – hours spent reviewing data, discussions from other cities, reviewing best practices, and developing consensus around recommendations. Work groups met monthly (and often more frequently) between November 2008 and July 2009. The draft 10-Year Plan strategies were presented to the Milwaukee Continuum of Care in July 2009; the plan has continued to be refined based on the Continuum's input as well as input from other key community stakeholders.

The Continuum of Care received planning support from Kristina Hals of the Technical Assistance Collaborative in Boston, MA, who provided information, resources, and guidance based on TAC's extensive experience in community planning on issues of homelessness and housing. Staff support was also provided by Jessica Shriver, Continuum of Care Coordinator, and Janice Wilberg, Ph.D., Continuum of Care consultant. The Continuum of Care Steering Committee provided technical support, feedback, and leadership throughout the planning process.

The 10-Year Plan will be reviewed by the City of Milwaukee Common Council and the Milwaukee County Board of Supervisors before its submission to the Mayor and County Executive for endorsement. A planning day scheduled for February 22, 2010, will launch the implementation phase of the 10-Year Plan.

For more information about the 10-Year Plan, please contact Joe Volk, Executive Director, Community Advocates, Continuum of Care Lead Agency, at 414-270-2970 or [jvolk24607@aol.com](mailto:jvolk24607@aol.com).



## Demographic Overview

Data from the 2007 and 2009 Point in Time Surveys of Homelessness in Milwaukee was used to inform the 10-Year Plan development process. The Milwaukee Continuum of Care conducts a Point in Time Survey of homeless people every two years to provide essential data for funding sources, policy development, and program/system improvement efforts. The Point in Time collects information directly from homeless people in face to face interviews conducted by trained volunteers. Volunteers interviewed sheltered homeless people in emergency shelter, transitional housing, and unsheltered people at meal programs, drop-in centers, public libraries, and in dozens of other locations where homeless, unsheltered people are known to congregate. A total of 41 organizations and 70 volunteer interviewers participated in the 2009 Point in Time Survey.

The 2009 Point in Time Survey counted a total of 1,660 adults and children who were homeless on the night of January 28, 2009, including 965 adults and 349 children counted directly by the Point in Time and an additional 346 adults and children reported by the Rescue Mission. Of the 965 adults counted by the Point in Time, 919 were directly interviewed by community volunteers. The results of those interviews are reported in this section: Demographic Overview.

Both sheltered and unsheltered homeless adults were interviewed using a 21-question survey instrument which addresses these areas: age, gender, race and ethnic origin, household status/family composition, family size, veteran status, history of discharges from institutions, reasons for current episode of homelessness, mobility, length of current episode of homelessness, frequency of homelessness, educational level, employment status, disability status, government benefits utilization, and service gaps.

## Key Point in Time findings:

- 1. Increase in homelessness:** A total of 1,660 homeless adults and children were counted in 2009 compared to 1,470 in 2007, an increase of 13% in two years. Homeless respondents tended to be homeless fewer times in the past three years but for longer periods. This year, 9 out of 10 were homeless for more than a month; over a third homeless for over a year.
- 2. Change in demographics:** This year, homeless adults were more likely to be older (41-60), male, and single with no children than in 2007. There was no change in race/ethnic origin or veteran status. As in 2007, the incidence of homelessness drops significantly at age 61+. Most had high school diplomas; few were employed.
- 3. Employment-related causes:** Unemployment and low wages were cited by nearly half of respondents as the reason for their homelessness, followed by health/mental health, family/relationship issues, housing-related problems, and finally institution-related reasons, e.g. foster care, jail/prison discharge.
- 4. Prevalence of disabilities:** Most respondents indicated they had or had been told they had one or more disabilities, i.e. mental illness, physical disability, alcohol abuse, drug abuse, developmental/learning disability, HIV/AIDS or other. Incidence of mental illness and developmental disability/learning disability increased between 2007 and 2009.
- 5. Getting help:** Most respondents were receiving some kind of government benefit; top benefits: food stamps, GAMP/BadgerCare Plus, SSI/SSDI, and Medicaid but the help was not sufficient to keep them housed. Biggest service gaps cited by homeless were help finding work and housing.





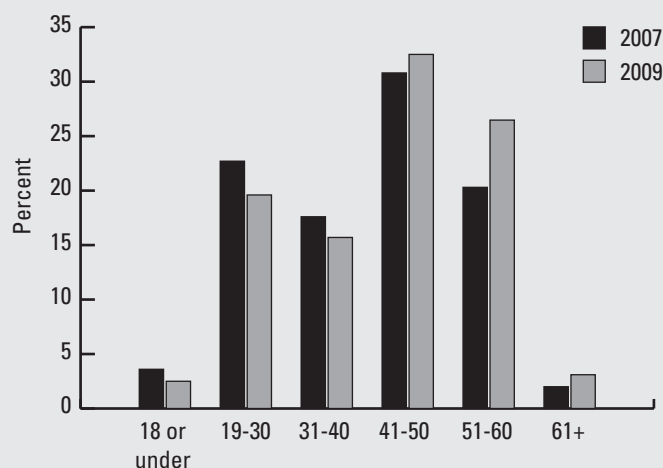
# 2009 RESULTS AND COMPARISON TO 2007

## Demographic Characteristics of Homeless Adults

### AGE

Age	Number	Percent
18 years or under	23	2.5%
19 – 30 years	179	19.6%
31 – 40 years	144	15.7%
41 – 50 years	297	32.5%
51 – 60 years	244	26.7%
61 years or over	28	3.1%
Total	915 <sup>1</sup>	100.0%

**This year:** Homeless adults tended to be middle-aged with 59.2% falling in the 41-60 age range. Twice as many homeless adults fell in the 41-50 age range as in the 31-40 range (297 or 32.5% ages 41-50 compared to 144 or 15.7% ages 31-40). The number of homeless adults drops dramatically at age 61, with only 3.1% falling in this category.



**Compared to 2007:** Homeless people in the 2009 Point in Time Survey tended to be older than those counted in 2007. Look specifically at the percentage decreases in the younger age ranges (18 and under, 19-30, and 31-40) and the increases in the older age ranges (41-50, 51-60, and 61 and over).

### GENDER

Gender	#	%
Male	561	61.1%
Female	357	38.9%
Total	918	100.0%

**This year:** About 6 out of every 10 homeless persons interviewed for the Point in Time Survey were men.

**Compared to 2007:** The percentage of males was higher in 2009 (61.1%) than in 2007 (55.0%). This is a fairly dramatic increase in a two-year period.

<sup>1</sup> A total of 919 homeless people were interviewed, but not all respondents answered every question.



## Demographic Characteristics of Homeless Adults

### RACE AND ETHNIC ORIGIN

Age Range	#	%
African American	553	60.9%
Asian	2	.2%
Native American	11	1.2%
Mixed Race	40	4.4%
Caucasian	260	28.6%
Hispanic/Latino	58	6.5%
Other	42	4.6%
Total	908	100.0%

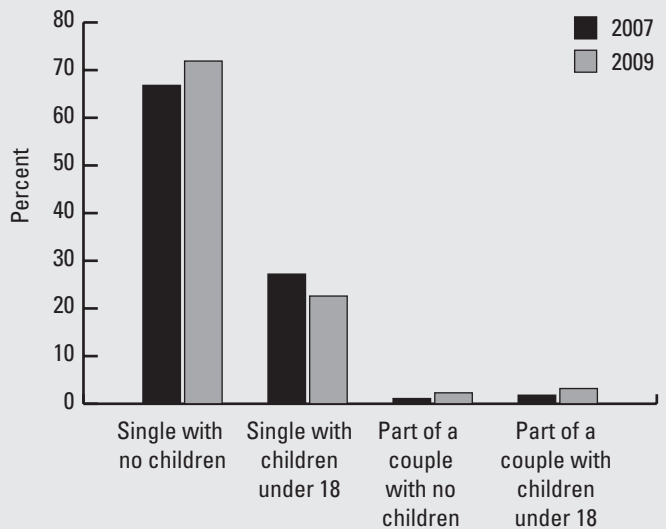
**This year:** The majority of homeless adults was African American (60.9%); the next largest group was Caucasian (28.6%) followed by Other and Mixed Race, which together represent 9.0% of the total. A small percentage of those interviewed were Hispanic/Latino (6.5%). It is important to note that Hispanic/Latino individuals can be of any race so this percentage is separate from the percentages reported for the racial categories.

**Compared to 2007:** There was virtually no change in the race and ethnic origin distribution compared to 2007.

### HOUSEHOLD STATUS/FAMILY COMPOSITION

Gender	#	%
Single with <i>no</i> children	658	71.9%
Single with children under 18	207	22.6%
Part of a couple with <i>no</i> children	21	2.3%
Part of a couple with children under 18	29	3.2%
Total	915	100.0%

**This year:** Most homeless adults were childless – 74.2% were either single with no children or part of a couple with no children. About a quarter of homeless adults were parents – 25.8%.



**Compared to 2007:** There was a higher proportion of childless adults in the 2009 homeless group when compared to 2007, and a lower proportion of adults with children under the age of 18. Also note the increased percentage of couples counted in 2009 as compared to 2007.



### HOMELESS CHILDREN

Family size of homeless families	#	%
1 child	63	36.8%
2 children	65	38.0%
3 children	27	15.8%
4 children	9	5.3%
5 children	4	2.3%
6 children	2	1.2%
7 children	1	.6%
Total	171	100.0%

The survey asked the question, "How many children under 18 spent the night with you last night who also do not have a permanent place to live?" This question was not asked in 2007.

A total of 171 homeless adults reported having their children under the age of 18 stay with them the previous night and not having a place to live.

**This year:** The survey results indicate that the vast majority (90.6%) of homeless families are comprised of 3 or fewer children. Fewer than 1 in 10 homeless families (9.4%) were large families, i.e. 4 or more children.

### VETERAN STATUS

Veteran Status	#	%
Veteran	163	17.8%
Not a veteran	753	82.2%
Total	916	100.0%

**This year:** Nearly 1 in 5 homeless adults identified him or herself as a veteran.

**Compared to 2007:** The percentage of homeless adults who were veterans was virtually unchanged from 2007 (17.1%) to 2009 (17.8%).

### DISCHARGE HISTORY

Respondents were asked the question: In the past 6 months, have you been discharged from any of the following places WITHOUT a place to live? The problem of institutions discharging people to shelter or to the streets has been recognized across the U.S.; each year, the U.S. Department of Housing and Urban Development asks the Milwaukee Continuum of Care to document what is being done to prevent inappropriate discharges from hospitals, mental health facilities, jails, prisons, and foster care.

Discharge Facility	#	%
Hospital/health care facility	106	11.5%
Mental health care facility	52	5.7%
Jail/House of Correction	68	7.4%
Prison	22	2.4%
Foster Care or Group Home	11	1.2%

**This year:** This is a new question that was added in 2009 so we are not able to compare results to 2007. In 2007, we tried to quantify the problem of institutional discharges to shelter or the street by only asking the question, "Where did you spend last night?" This year, the survey planning team focused the question on five key institutions and lengthened the period of time (from 1 night to anytime during the past 6 months). The key finding is that there were 259 instances in which people reported being discharged from an institution, e.g. hospital, prison, without a place to stay. If this was an unduplicated count (and we cannot assure that it is since respondents could report more than one instance), it would represent 28.2% of the total number of homeless adults surveyed.

## REASONS FOR CURRENT EPISODE OF HOMELESSNESS

Respondents were asked the question: "Why did you become homeless this time?" and were allowed to choose all of the answers that applied to their situation. (There were about 1.5 answers for each person interviewed.)

Reason	2009 #	2009 %	2007 %
<b>Employment-related:</b>			
Lost job/cannot find work	355	38.6%	27.7%
Wages too low	93	10.1%	11.9%
<b>Family/relationship-related:</b>			
Family break-up	135	14.7%	12.3%
Abuse/violence	99	10.8%	7.0%
Asked to leave place where I was staying	120	13.1%	12.6%
Runaway/thrown out	36	3.9%	1.7%
<b>Institution-related<sup>1</sup>:</b>			
Foster care/group home discharge	4	.4%	0%
Jail/prison discharge	78	8.5%	7.4%
<b>Housing-related:</b>			
Eviction <sup>2</sup>	120	13.1%	14.3%
Foreclosure	34	3.7%	
High housing costs	99	10.8%	5.2%
High utility costs	61	6.6%	3.1%
<b>Health/mental health-related:</b>			
Medical problems	93	10.1%	6.4%
Mental illness	115	12.5%	8.0%
Substance abuse problems	174	18.9%	13.3%
Lost benefits	35	3.8%	2.2%
<b>Other:</b>			
Other	63	6.9%	9.7%

<sup>1</sup> Hospital discharge was inadvertently omitted from the 2009 survey.

<sup>2</sup> Eviction and foreclosure were merged in the 2007 survey.

<sup>3</sup> Don't know/not sure was not included as a response category in 2007.

**This year:** The #1 most frequently stated reason for homelessness was "lost job/cannot find work" which was indicated by 38.6% (or 355) of the 919 homeless adults interviewed. When combined with "wages too low," employment-related reasons represented nearly half (48.7%) of the reasons mentioned for homelessness. Health/mental health-related reasons represented 45.3% of reasons cited; family/relationship-oriented reasons represented 42.5%; housing-related represented 34.2%; and institution-related represented 8.9%.

**Compared to 2007:** Interestingly, all but 2 of the reasons on the list showed an increased percentage of respondents selecting them as the reason for their current episode of homelessness. The only exceptions were "wages too low" and "other."



## CITY OF RESIDENCE – LAST YEAR

City	2009 #	2009 %	2007 %
Milwaukee	767	83.8%	85.9%
Other city/place in Wisconsin	72	7.9%	4.8%
Other city/place in another state	75	8.2%	9.3%
Outside of US	1	.1%	0%

**This year:** The great majority (83.8%) of homeless people had lived in Milwaukee this time last year; however, nearly one out of four (16.2%) had lived either somewhere else in Wisconsin or in another state/country.

**Compared to 2007:** There are two interesting changes. First, in 2009, there was a slightly higher percentage of people who had lived somewhere outside of Milwaukee compared to 2007 (16.1% in 2009 compared to 14.1% in 2007). Second, there were many fewer 'missing' respondents, i.e. people who didn't answer this question, in 2009 (only 4) compared to 2007 (25).

### LENGTH OF CURRENT EPISODE OF HOMELESSNESS

Length of current episode of homelessness	2009 #	2009 %	2007 %
Less than 1 month	83	9.5%	19.6%
1 to 3 months <sup>1</sup>	155	17.8%	
4 to 6 months	133	15.3%	44.2%
Longer than 6 months but less than 1 year	162	18.6%	
1 to 3 years	207	23.8%	24.8%
More than 3 years	112	12.9%	8.9%
Not sure/don't know	19	2.3%	2.6%
Total	871	100.0%	100.0%

**This year:** About 1 out of homeless adults had been homeless for less than a month; that means that 9 out of 10 were homeless for more than a month. About half (51.7%) had been homeless for one to 12 months. Over a third (39.0%) had been homeless for a year or more. In 2009, 43.2% of surveyed homeless adults were chronically homeless according to the HUD definition (homeless for one year or more or homeless 4 or more times in the past three years). This is significantly higher than 2007 when the percentage of chronically homeless was 28.4%.

**Compared to 2007:** In 2007, 2 out of 10 homeless adults surveyed were 'short-timers' — people who had been homeless for less than a month compared to just 1 out of 10 in 2009. There were fewer 'short-timers' in 2009 than in 2007 — in other words, people tended to report longer episodes of homelessness. People were more likely in 2009 than in 2007 to have experienced a period of homelessness ranging from one to 12 months, 51.7% of respondents (2009) compared to 44.2% (2007). Also of note is the increased percentage of people reporting long periods of homelessness (more than 3 years), 12.9% of respondents (2009) compared to 8.9% (2007).

### FREQUENCY OF HOMELESSNESS

Times homeless in past 3 years	2009 #	2009 %	2007 %
1 time	410	47.5%	42.5%
2 times	206	23.8%	26.4%
3 times	87	10.1%	11.0%
4 times	39	4.5%	5.7%
5 or more times	122	14.1%	14.4%
Total	864	100.0%	100.0%

**This year:** About half of those surveyed (52.5%) had been homeless multiple times in the past three years. One out of 5 (18.6%) had been homeless four or more times during this period.

**Compared to 2007:** 2009 shows an increased percentage of people who have been homeless just one time (47.5% in 2009 compared to 42.5% in 2007). The percentage of people experiencing multiple episodes of homelessness decreased during this period from 57.5% in 2007 to 52.5% in 2009.

<sup>1</sup> In 2007, the categories 1 to 3 months, 4 to 6 months, and longer than 6 months but less than a year were combined into one category of more than 1 month but less than a year.

## EDUCATIONAL LEVEL

Educational level attained	#	%
Less than high school diploma	253	27.8%
High school diploma	266	29.3%
GED	126	13.9%
Some college, technical or trade school	206	22.7%
Associate degree	23	2.5%
Apprenticeship program	3	.3%
Bachelor degree or higher	32	3.5%
Total	909	100.0%

**This year:** Three out of four respondents (72.2%) had attained a high school diploma or higher level of education. Comparable data for 2007 is not available because this question was not included on that year's survey.

## EMPLOYMENT STATUS

Employment status	#	%
Employed part time	110	12.0%
Employed full time	83	9.1%
Unemployed	722	78.9%
Total	915	100.0%

**This year:** Only about one out of five (21.1%) homeless adults was employed either full or part time. Comparable data for 2007 is not available because this question was not included on that year's survey. Homeless people with a high school diploma or GED or college or training after high school were significantly more likely to be employed either part time or full time than those without that credential. While 14.7% of homeless people without a high school diploma were employed, 23.3% of those with a high school diploma or GED and 24.7% of those with post high school-college or training had full or part time jobs.

**Duration of unemployment:** Unemployment tended to be of long duration. Of those unemployed, 70.5% had been without a job for six months or more. The length of unemployment was strongly correlated with the length of homelessness; in other words, homelessness and unemployment seemed to mirror each other.

**Willing and able to work:** Unemployed respondents were asked if they were willing and able to work. Of those who were unemployed, 67.9% indicated that they would take a job if offered; 32.1% said that they were not willing and able to work. Among disabled persons, 60.3% were willing and able to work compared to 91.4% of non-disabled persons.



## DISABILITIES/SPECIAL CIRCUMSTANCES

Homeless adults were asked this question: "Do you think or have you been told that you have any of the following?" Respondents could select more than one disability/condition.

Disability/condition	2009 #	2009 %	2007 %
Mental illness	378	41.1%	33.3%
Physical disability	296	32.2%	16.9%
Alcohol abuse	250	27.2%	29.8%
Drug abuse	231	25.1%	30.3%
Developmental disability/learning disability	94	10.2%	3.6%
HIV/AIDS	14	1.5%	.4%
Victim of domestic violence	115	12.5%	6.4%
Other	10	1.1%	6.4%

**This year:** Four out of ten homeless adults (41.1%) reported thinking or having been told that they had mental illness. This is the most prevalent disability reported, followed by physical disabilities, and then alcohol and drug abuse. In 2009, 73.7% of homeless adults were identified as disabled; this meant that they had one of the disabling conditions listed in this section with the exception of domestic violence, or they were receiving SSI/SSDI. Respondents averaged 1.5 disabilities each.

**Compared to 2007:** The most striking changes have to do with the incidence of mental illness (increasing from 33.3% in 2007 to 41.1% in 2009), drug abuse (decreasing from 30.3% in 2007 to 25.1% in 2009), and developmental disability/learning disability (increasing from 3.6% in 2007 to 10.2% in 2009).

## Government Benefits Utilization

## GOVERNMENT BENEFITS UTILIZATION

Homeless adults were asked the following question: "Are you or any of your children with you now receiving any of the following government benefits?" Respondents could select more than one answer.

Government Benefit	2009 #	2009 %	2007 %
Social Security	42	4.6%	6.2%
SSI/SSDI	175	19.0%	14.6%
Medicaid/Medicare	174	18.9%	16.8%
GAMP/BadgerCare Plus	2203	22.1%	15.8%
TANF/W-2	84	9.1%	9.2%
Food Stamps	416	45.3%	34.6%
Veterans Benefits/Pension	15	1.6%	2.1%
Veterans Health Care	57	6.2%	5.0%
Unemployment Benefits	27	2.9%	1.4%
Other	33	3.6%	4.8%
No benefits of any kind	172	18.7%	24.4%

**This year:** The most frequently used government benefit was Food Stamps, followed by GAMP/BadgerCare Plus, SSI/SSDI, and Medicaid/Medicare.

**Compared to 2007:** Several areas are worth mentioning: SSI/SSDI increase from 14.6% in 2007 to 19.0% in 2009; GAMP/BadgerCare Plus increase from 15.8% to 22.1%; and the increase in Food Stamps from 34.6% to 45.3%, and the decrease in the percentage of people who received no benefits.



## GETTING HELP

Homeless adults were asked this question: "In the past month, what services did you or anyone in your family with you now need but could not get?" Respondents could select more than one answer.

Type of help	2009 #	2009 %	2007 %
Finding work/employment assistance	213	23.2%	20.7%
Finding permanent housing	246	26.8%	17.1%
Emergency shelter	59	6.4%	6.3%
Food	101	11.0%	8.0%
Rent/utility assistance	112	12.2%	9.1%
Transportation/bus passes	154	16.8%	8.4%
Medical care	87	9.5%	11.2%
Dental care	133	14.5%	9.2%
Mental health care	56	6.1%	2.9%
Alcohol or drug abuse treatment	37	4.0%	2.9%
Getting a Wisconsin ID or driver's license	94	10.2%	4.1%
Getting government benefits	80	8.7%	5.9%
Child care	20	2.2%	2.4%
Other service	19	2.1%	3.1%
No service gaps identified	326	35.5%	41.2%

**This year:** Homeless adults identified finding permanent housing as the most prevalent unmet need (26.8%), followed by employment help (23.2%), transportation/bus passes (16.8%), and dental care (14.5%).

**Compared to 2007:** Respondents were more likely to identify service gaps in 2009 than they were in 2007. In 2009, 64.5% of homeless adults identified at least one service gap in the past month compared to 58.8% in 2007. The biggest increases were in the area of finding permanent housing, transportation, dental care, getting a Wisconsin ID or driver's license, and mental health care.



# Four Pillars of the 10-Year Plan

## Prevention and Emergency Services

Provide early and easy access to resources and services that will help people avoid shelter stays and expedite acquisition of permanent housing.

## Economic Support and Employment

Better utilize existing employment and training resources to address the unique needs of homeless jobseekers.

## Mental Health, Substance Abuse, and Support Services

Develop sustainable methods for addressing the need for skilled supportive services for residents of permanent supportive housing for homeless people with disabilities.

## Permanent Housing

Maximize the use of existing and planned financing resources to significantly expand the availability of permanent supportive housing for homeless people.

## Pillar 1: Prevention and Emergency Services

The 10-Year Plan for Prevention and Emergency Services emphasizes the early provision of services aimed at preventing stays in emergency shelter in the first place and rapidly re-housing people if they become homeless and must use shelter resources.

Milwaukee has an extensive emergency shelter system with 438 shelter beds available for single adults and 223 beds available for persons in families. The system evolved over the 1980's and 1990's but has remained stable in the number of beds since 2000. This was in recognition of the fact that the development of additional shelter beds would make it more difficult to financially support the existing inventory as well as a growing sense among homeless service providers that system energy and resources should shift toward a "Housing First" approach.

The 10-Year Plan Prevention and Emergency Services Pillar assumes that Milwaukee's existing emergency shelter inventory will stay in place but will be used differently in the future. Essentially, the approach adopted by the Work Group is one that moves resources to an earlier point of intervention – before people come into emergency shelter. A variety of prevention services and pre-shelter interventions are planned. Once people become homeless, the plan includes activities aimed at rapidly-re-housing them so they are able to find, secure and maintain permanent housing.

The 10-Year Plan includes the following Prevention and Emergency Services elements:

- Improved Discharge Planning: Insure that people leaving institutions such as health care facilities, mental health care, jails and correctional facilities and the foster care system are not discharged to the shelter or to the street through the development of signed Memoranda of Understanding with discharging institutions with monitoring conducted by the Continuum of Care Homeless Management Information System.
- Homeless Connect: Conduct an annual Project Homeless Connect that will provide homeless and near-homeless people with direct access to information and services on housing, benefits, employment, legal services, health care, mental health care, clothing, hygiene, and other services; and provide an opportunity to involve community volunteers and businesses in homeless services.
- Homelessness Prevention/Rapid Re-housing: Provide landlord/tenant mediation and other legal assistance to people facing eviction; and implement a rapid re-housing program for individuals and families that includes limited rent assistance, the establishment of a preferred provider network, and housing locator services.
- Outreach: Establish a homeless prevention system that utilizes 2-1-1 and street outreach to provide information, assessment, triage, shelter diversion, and referral to housing and support services including behavioral health services to prevent/shorten shelter stays.
- Best Practices: Establish best practices for landlords, shelters, and other homeless service providers to ensure high quality services focused on rapid re-housing.





## Pillar 2: Economic Support and Employment

The 10-Year Plan for Economic Support and Employment focuses primarily on the challenge of significantly improving employment and training opportunities for homeless people through better use of Milwaukee's existing employment and training resources. Integrating homeless people into the mainstream of training and employment services is a high priority along with the development of innovative approaches to homeless-specific programming.

Unemployment among Milwaukee's homeless is extreme; the 2009 Homeless Point in Time Survey found that 78.9% of homeless people were unemployed and most of those (70.5%) had been unemployed for more than six months. At the same time, nearly three-quarters of homeless (72.2%) of homeless have completed high school and a 29.0% have some education beyond high school. Though chronically unemployed, homeless people, even those with disabilities, indicate a strong willingness to work.

Findings of an analysis of the intersection of homelessness and employment in Milwaukee identified several areas for action including homeless' concerns about employment, employer attitudes, and the accessibility of existing employment and training resources managed by the Milwaukee Area Workforce Investment Board, Milwaukee Area Technical College, and other institutions. The 10-Year Plan addresses these challenges with a comprehensive package of strategies.

The 10-Year Plan includes the following Economic Support and Employment elements:

- **Job Fair:** Integrate a Job Fair into the annual Homeless Connect that will recruit employers with an interest in employing homeless people and provide direct access to employment and training service providers.
- **Work-Linked Supportive Housing:** Implement a Work-Linked Supportive Housing Program with place-based part-time jobs and support services created by the housing management entity and partnering employers.
- **Employment Opportunity Center:** Create a centralized Employment Opportunity Center to provide soft skills training, financial literacy, individual development accounts, training coordination, employee brokers, legal services, job coaching and job retention assistance to homeless workers.
- **Pathways:** Create new pathways for homeless job seekers to maximize use of mainstream employment and training resources including those managed by TANF/W-2, Department of Vocational Rehabilitation, Milwaukee Area Workforce Investment Board, Ticket to Work, Goodwill, and the Milwaukee Area Technical College.
- **Social Enterprise:** Study the feasibility of a job-creating social enterprise based on successful models and best practices developed in other cities.

## Pillar 3: Mental Health, Substance Abuse, and Support Services

The 10-Year Plan for Mental Health, Substance Abuse, and Support Services focuses on the generation of sustainable resources to support high quality behavioral health services for people with mental health and substance abuse disorders.

As Milwaukee has begun to develop more permanent supportive housing for homeless people with disabilities the issue of supportive service funding has become critical. With planned inventory expansions of 1,260 units over the next ten years, the challenge has become even greater. High quality permanent supportive housing requires the provision of skilled case management, peer support, and supportive services that can help people maintain recovery and stay in permanent housing. The 10-Year Plan elements in this area focus on how to create a stable infrastructure of behavioral health services that can accommodate growth in the community's permanent supportive housing inventory and ensure the best possible support for homeless people who become residents in these new housing units.

The 10-Year Plan also attends to the growing commitment to peer support, looking at this new resource as a key way to increase the level of support within the permanent supportive housing environment; all within the context of establishing, monitoring and enforcing best practice standards for permanent supportive housing over the long term. Advocacy for the interests of homeless people at every level of community planning and policymaking is also included in the plan.

The 10-Year Plan includes the following Mental Health, Substance Abuse, and Support Services elements:

- **Sustainable Funding:** Secure annual funding in the Wisconsin state budget to fund supportive services for individual and families living in permanent supportive housing projects that are supported by the Continuum of Care.



- **SOAR:** Implement an expanded SOAR (SSI/SSDI Outreach, Access and Recovery) that will pair a SOAR specialist with case management to significantly increase the number of people able to secure SSI/SSDI.
- **Best Practices:** Develop best practice standards for permanent supportive housing which incorporate recovery principles; and conduct regular monitoring of permanent supportive housing to assure compliance with those standards.
- **Peer Support:** Expand the successful resident manager and peer support specialist models to new permanent supportive housing development.
- **Advocacy:** Advocate for the interests of the homeless in the development of community plans and system improvement initiatives, specifically in the areas of identifying alternative and sustainable sources of revenue for homeless services, improving access to mainstream benefits and supportive services, integrating substance abuse and mental health services, and consumer involvement in policy and program decision-making.

## **Pillar 4: Permanent Housing**

The 10-Year Plan for Permanent Housing emphasizes strategies to maximize the use of existing and planned financial resources to significantly expand the availability of permanent supportive housing for homeless people, especially people with mental illness and other disabilities.

Milwaukee's current permanent supportive housing inventory for homeless people includes 631 units for individuals and 214 units for persons living in families. New housing developments, launched in the past two years, have successfully organized multiple funding sources to create viable projects, but there is general recognition that this process has been extremely difficult. Project siting and zoning issues further complicate and often impede the development of new permanent supportive housing and tax the ability of developers to see projects through to completion.

The 10-Year Plan for Permanent Housing looks to existing funding sources and mechanisms to increase the number of permanent supportive housing units by 1,260 over the next ten years. The Plan elements assume shared responsibility involving the Continuum of Care's Bonus Project resource through the U.S. Department of Housing and Urban Development, and commitments from the State of Wisconsin (WHEDA), Milwaukee County, and the City of Milwaukee.

The 10-year Plan includes the following Permanent Housing elements:

- **New Construction:** Assist the construction of 1,260 new permanent supportive housing for homeless individuals by providing gap funding through:
  - Continuum of Care commitment to leverage bonus permanent housing funds to support permanent supportive housing for homeless people
  - City and County set-asides of HOME, CDBG, and Housing Trust Fund resources for permanent supportive housing for homeless people
  - WHEDA set-aside of Low Income Housing Tax Credits for permanent supportive housing for homeless people
- **Siting/Zoning Plan:** Develop a permanent supportive housing siting/zoning plan that will assist in combating zoning and NIMBY barriers.
- **Housing Access Partnership:** Create a Housing Access Partnership for Milwaukee County/City to address barriers to publicly-assisted housing that are experienced by homeless people.
- **New Funding:** Continue to seek new funding to create additional housing including Section 811 Project Rental Assistance Contract, National Housing Trust Fund, Neighborhood Stabilization Program, and HUD's boutique set-asides of Section 8 for special populations.



# **Prevention and Emergency Services Action Plan**



### 1.1 GENERAL STRATEGY: Create a Cross-System Discharge Planning Strategy

#### 1.1a Proposed Action:

Milwaukee will create a *Cross-System Discharge Planning Strategy* in Milwaukee to prevent persons residing temporarily in local institutions from becoming homeless immediately upon release for reasons of inadequate discharge planning or the absence of residential opportunities. Institutions targeted for this component will be the foster care system, mental health and substance abuse treatment residential/inpatient facilities, local and state correctional systems, and local health care systems, in that order of priority. The *Cross-system Discharge Strategy* will not only reduce the number of people requiring emergency shelter in Milwaukee but will also reduce crime and contain law enforcement costs by stabilizing the lives of local ex-offenders who are more vulnerable to recidivism when homeless as well as supporting the recovery goals of persons with mental illness and substance abuse disorders.

This project will be led by a local community planning agent who can perform a boundary spanning role between the Milwaukee's Continuum of Care of homeless service providers and the foster care system, local and state corrections, mental health and substance abuse treatment providers, and local health care systems. Upon implementation, the *Cross-System Discharge Strategy* may include any or all of the following strategies: newer and more comprehensive discharge planning methods adopted by the local institutions, in-reach to local institutions by homelessness prevention providers, assistance with public benefit applications for persons leaving institutions, coordinated matching of people leaving institutions with best fit permanent supportive housing, and development of new supportive housing or transitional housing specifically for subpopulations such as youth leaving foster care or persons with mental illness.

#### 1.1b Quantity of Proposed Units of Service: Four discharge protocols established

#### 1.1c Intended Outcomes:

- **First Year:** Discharge protocol established between one system and the Continuum of Care
- **Over 10 Years:** Discharge protocols established between four systems and the Continuum of Care

1.1d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	1	1		\$25,000 <sup>1</sup>	\$25,000
2011	1	2		\$25,000	\$50,000
2012	1	3		\$25,000	\$75,000
2013	1	4		\$25,000	\$100,000

#### 1.1e Potential Funding Options Identified/Secured:

1. Private foundation to support planning and development
2. U.S. Department of Justice Partnership Initiative
3. In-kind support from Community Advocates
4. Joint Federal Agencies - The Serious and Violent Offenders Reentry Initiative
5. Local health care systems

#### 1.1f Responsible Parties:

1. Milwaukee Continuum of Care
2. Community Advocates
3. Milwaukee County Jail and House of Correction; Wisconsin Department of Corrections
4. Health Care Systems
5. Mental Health and Substance Abuse Treatment Facilities
6. Non-profit agencies serving youth in foster care, ex-offenders, persons with mental illness and substance abuse, and individuals with serious/chronic health issues

#### 1.1g First Steps Towards Action Implementation:

1. Consult system-wide examples of discharge planning designed to prevent homeless that were created in Massachusetts, Minnesota, Illinois, and Ohio.
2. Carry out preliminary needs assessment and community planning work to devise strategies.
3. Implement first priority strategies - address discharge planning quality in the foster care system.
4. Identify additional strategies and devise timeline and feasibility assessment for each system.

<sup>1</sup> Includes cash and in-kind support.

# 10 Year Plan Workgroup Final Worksheet

## Prevention and Emergency Services

### 1.2 GENERAL STRATEGY: Launch Annual *Project Homeless Connect* Event

#### 1.2a Proposed Action:

Milwaukee will launch a local version of the national model of *Project Homeless Connect* – an annual public event that creates ready service access for people who are homeless. The *Homeless Connect* events in Milwaukee will co-locate multiple needed services in a centralized and highly accessible setting. The goals are to link disconnected homeless people with services for the first time and to connect others with services not made expressly available to people who are homeless any other time of the year. The *Homeless Connect* model has a proven track record of success in several cities nationwide including several comparable to Milwaukee.

*Project Homeless Connect's* free services in Milwaukee will include: legal consultation, health screenings, dental care, wheelchair repairs, free bank account opportunities, free voicemail account opportunities, benefits applications, veterans' services, haircuts, TB testing, mammograms, mental health screening, vision exams, applications for identification cards /birth certificates, housing applications, rapid re-housing assessments, vouchers for shoes and work clothes, distribution of personal care and hygiene items, employment counseling/ applications, public benefits applications, distribution of information cards, and food.

#### 1.2b Quantity of Proposed Units of Service: One Project Connect annually

#### 1.2c Intended Outcomes:

- **Year 1:** 300 individuals to participate at each event
- **Year 2:** 400 individuals to participate at each event
- **Year 3 - 10:** 500 Individuals to participate at each event

1.2d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	400	400		\$50,000 <sup>2</sup>	\$50,000
2011	500	900		\$50,000	\$100,000
2012	500	1400		\$50,000	\$150,000
2013	500	1900		\$50,000	\$200,000
2014	500	2400		\$50,000	\$250,000
2015	500	2900		\$50,000	\$300,000
2016	500	3400		\$50,000	\$350,000
2017	500	3900		\$50,000	\$400,000
2018	500	4400		\$50,000	\$450,000
2019	500	4900		\$50,000	\$500,000

#### 1.2e Potential Funding Options Identified/Secured:

1. Greater Milwaukee Foundation, - one time grant to finance planning costs
2. Local Corporate Philanthropy - one time grant for start up costs
3. Milwaukee Business District Associations – one time grant for start up costs
4. Volunteers from private sector companies to provide staff support of the event.
5. In-kind providers of services including doctors, nurses, lawyers,
6. In-kind donations of food, clothing, hygiene products etc.

#### 1.2f Responsible Parties:

1. United Way - Project Homeless Connect Planning and Coordination Assistance
2. Milwaukee Continuum of Care nonprofit project sponsors

#### 1.2g First Steps Towards Action Implementation:

1. Milwaukee COC to issue appeal for support of Project Homeless Connect.
2. Submit funding application to local foundation and/or United for start-up support.
3. Identify Homeless Connect Planner/Coordinator to organize the first Homeless Connect.
4. Identify private and public sector community partners.
5. Set dates for Kick Off of initial *Project Homeless Connect*.

<sup>2</sup> Includes cash and in-kind support.

### 1.3 GENERAL STRATEGY: Implement and Grow a New *Rapid Re-Housing Program*

#### 1.3a Proposed Action:

Milwaukee will implement a Rapid Re-Housing Program for homeless individuals and families that utilizes short term rent assistance to reduce the length of shelter stays and provides a quick leg up out of the emergency shelter system. The Rapid Re-Housing Program will be targeted specifically to homeless individuals and households whose primary obstacle to exiting shelter is not being able to afford the cost of first month's rent and not having sufficient income to fully cover rent for the first months of their tenancy. This is a time-limited form of assistance that will help households regain housing and gradually reestablish their ability to develop full financial independence.

The Rapid Re-Housing intervention is built upon evidence that once housing is secured, many formerly homeless people are much better positioned to increase their income and build their stability. During the household's transition out of homelessness, Rapid Re-Housing will pay for first month's rent, security deposit, moving costs, and a portion of the rent on an as needed basis. Households' needs for financial assistance will be regularly reassessed; and case management will be provided. In their search for appropriate rental units, participants in the Rapid Re-Housing Program will have available to them a network of landlords and an on-line housing locator service. Ultimately, the Rapid Re-Housing Program will free up capacity

#### 1.3b Quantity of Proposed Units of Service:

#### 1.3c Intended Outcomes:

- **Per Year:** 75 Households to participate in Rapid Re-Housing
- **Over 10 Years:** 750 households to participate in Rapid Re-Housing over 10 years

1.3d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010		75		\$800,000	\$800,000
2011		75		\$800,000	\$1,600,000
2012		75		\$800,000	\$2,400,000
2013		75		\$800,000	\$3,200,000
2014		75		\$800,000	\$4,000,000
2015		75		\$800,000	\$4,800,000
2016		75		\$800,000	\$5,600,000
2017		75		\$800,000	\$6,400,000
2018		75		\$800,000	\$7,200,000
2019		75		\$800,000	\$8,000,000

#### 1.3e Potential Funding Options Identified/Secured:

1. HUD Homeless Prevention and Rapid Re-Housing Program
2. TANF assistance
3. City of Milwaukee and Milwaukee County Emergency Shelter Funding
4. State of Wisconsin Emergency Shelter Grant, Transitional Housing Program, and Homeless Prevention Program Funding
5. Local HUD HOME funds

#### 1.3f Responsible Parties:

1. City of Milwaukee HPRP Lead Agency and Grantees
2. Milwaukee Continuum of Care

#### 1.3g First Steps Towards Action Implementation:

1. Implement Milwaukee's HPRP program according to HUD calendar.
2. Begin research on options for financing this program when HPRP funding ends.
3. Devise scope and budget for the program for the 8 year period after HPRP.
4. Follow national trends that will likely increasingly emphasize rapid re-housing models.
5. Pursue new national funding opportunities to expand rapid re-housing in Milwaukee.

# 10 Year Plan Workgroup Final Worksheet

## Prevention and Emergency Services

### 1.4 GENERAL STRATEGY: Create 2-1-1 Homeless Helpline and Mobile Team

#### 1.4a Proposed Action:

Milwaukee will support the 2-1-1 @ IMPACT Homeless Helpline and explore the feasibility of establishing a Mobile Team to link people who are homeless and at-risk with local resources to prevent and re-solve homelessness. Milwaukee's 2-1-1 @ IMPACT is a 24 hour, free, confidential phone service similar to those that operate successfully in other U.S. cities - often in conjunction with wider human service referral networks. Milwaukee's 2-1-1 Homeless Helpline will connect callers to emergency rent assistance, security deposits, homeless prevention interventions, shelter referrals, permanent affordable housing, mental health assistance, domestic violence resources, and other services that will prevent homelessness and promote housing stability.

The Milwaukee 2-1-1 Mobile Team program will be an extension of the 2-1-1 Homeless Hotline. It will be a street outreach team that is deployed in local business and residential areas to extend assistance to people who are living on the street. The Team will provide information, assessment, and triage to help individuals connect with homeless services and homelessness diversion opportunities. A particular emphasis of the Mobile Team will be assessments of persons with mental health issues and assistance in obtaining needed mental health services.

#### 1.4b Quantity of Proposed Units of Service: Between 500-1,000 units of service provided/year

#### 1.4c Intended Outcomes:

- **Per Year:** 500 households assisted in the initial start-up year
- **Over 10 Years:** Over 5,000 different households assisted – many to be assisted more than once

1.4d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	400	400		\$200,000 <sup>3</sup>	\$200,000
2011	100	500		\$250,000	\$450,000
2012		500		\$250,000	\$700,000
2013		500		\$250,000	\$950,000
2014		500		\$250,000	\$1,200,000
2015		500		\$250,000	\$1,450,000
2016		500		\$250,000	\$1,700,000
2017		500		\$250,000	\$1,950,000
2018		500		\$250,000	\$2,200,000
2019		500		\$250,000	\$2,450,000

#### 1.4e Potential Funding Options Identified/Secured:

1. HUD Homelessness Prevention and Rapid Re-Housing Program
2. United Way
3. Community Development Block Grant
4. Milwaukee Business Improvement Districts and Associations
5. Emergency Shelter Grant
6. Veterans Assistance

#### 1.4f Responsible Parties:

1. 10 Year Plan Implementation Team
2. Cathedral Center Coordinated Intake Project
3. Milwaukee 2-1-1 @ IMPACT

#### 1.4g First Steps Towards Action Implementation:

1. Review the strengths and weaknesses of Milwaukee's 2-1-1 @ IMPACT homeless service.
2. Conduct community planning meetings to discuss the roll out of an enhanced 2-1-1 homeless service.
3. Coordinate the 2-1-1 homeless service with other strategies in the 10 Year Plan.

<sup>3</sup> Includes cash and in-kind support.



### 1.5 GENERAL STRATEGY: Develop *Best Practice Guidelines on Housing First*

#### 1.5a Proposed Action:

Milwaukee will develop *Best Practice Guidelines on Housing First and Rapid Shelter Exit* to be used as an educational tool and catalyst of systems change for all shelter providers, homeless service agencies, and landlords with a role in homeless housing in Milwaukee. The goal of the *Best Practice Guidelines* is to ensure that Milwaukee's homeless system, in its entirety, is in concert with national evidence-based best practices related to emphasizing Rapid Exit from shelter and seeking permanent housing opportunities through Housing First mechanisms for any and all homeless persons without undue requirements for intermediary or transitional steps towards permanency.

In-service trainings and peer to peer consultations will be set up for agencies system-wide in Milwaukee to cultivate skill-sharing and educate staff members at every level within the organizations about the principles and goals underlying Housing First and Rapid Exit principles. In conjunction with development of these *Best Practice Guidelines*, Milwaukee will seek opportunities to bring trainings sponsored by national intermediary organizations on Housing First and Rapid Exit to Milwaukee. Ultimately, the *Best Practice Guidelines* will help hasten the County's move toward Housing First and Rapid Exit and bring about a system-wide transformation.

**1.5b Quantity of Proposed Units of Service:** Milwaukee housing agencies, homeless service organizations, and landlords participating in homeless programs will be engaged with the Best Practice Guidelines through educational forums and peer to peer skill sharing sessions.

#### 1.5c Intended Outcomes:

- **Per Year:** 25% percent of agencies of the Continuum of Care engaged in first year
- **Over 10 Years:** 75% of agencies engaged with Guidelines by Year 2 of the 10 Year Plan; 100% engaged by Year 3 of the 10 Year Plan.

1.5d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
	2010			\$25,000	\$25,000
	2011				\$25,000
	2013				\$25,000

#### 1.5e Potential Funding Options Identified/Secured:

1. United Way
2. Private foundations
3. City of Milwaukee
4. Milwaukee County

#### 1.5f Responsible Parties:

1. Continuum of Care, including the Shelter Task Force
2. National intermediaries: Corporation for Supportive Housing, Abt Associates, TAC Inc.
3. Local supportive housing providers and developers
4. Local mental health and disability advocacy and support organizations

#### 1.5g First Steps Towards Action Implementation:

1. Convene working group to determine parameters and content for the Guidelines.
2. Consult related publications that have been produced by national intermediary organizations.
3. Choose agent to author *Guidelines* for Milwaukee.
4. Begin trainings and peer to peer exchanges on the *Guidelines*.
5. Recruit national intermediaries to visit Milwaukee and train local staff on Rapid Exit/ Housing First.
6. Send Milwaukee representatives to annual national homeless and housing conferences.
7. Review and update the *Guidelines* annually to incorporate newest best practices and principles.



# **Economic Support and Employment Action Plan**



### 3.1 GENERAL STRATEGY: Integrate a *Job Fair* into Project Homeless Connect

#### 3.1a Proposed Action:

Milwaukee will integrate a *Job Fair* into the City's new *Project Homeless Connect* – an annual public event that creates ready service access for people who are homeless and previously homeless. The *Homeless Connect* events will co-locate multiple needed services in one public, highly accessible setting. The goals are to link disconnected homeless people with services for the first time and to connect others with services not made expressly available to people who are homeless any other time of the year. Milwaukee will emulate other cities' success in using *Homeless Connect* to expand available supports and engage individuals who have yet to link in with service networks.

In Milwaukee, a *Job Fair* will be central to the *Project Homeless Connect* model. Event planners will recruit employers who have an interest in the advantages of employing people who are homeless including tax credits and improved community relations. In addition, job training agencies will be anchors to the *Project Homeless Connect* team of co-located services. Participation will be tracked from the inaugural event to make comparisons with those that follow.

#### 3.1b Quantity of Proposed Units of Service: 100 households per year better stabilized via increased income

#### 3.1c Intended Outcomes:

- **Year 1:** 20 individuals to participate at each Job Fair event
- **Year 2:** 40 individuals to participate at each Job Fair event
- **Year 3:** 50 Individuals to participate at each event

3.1d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	400	400		Costs incorporated into Homeless Connect (See Homelessness Prevention and Emergency Services)	
2011	500	900			
2012	500	1400			
2013	500	1900			
2014	500	2400			
2015	500	2900			
2016	500	3400			
2017	500	3900			
2018	500	4400			
2019	500	4900			

#### 3.1e Potential Funding Options Identified/Secured:

Please refer to Prevention and Emergency Services.

#### 3.1f Responsible Parties:

1. Milwaukee Continuum of Care
2. Milwaukee Area Workforce Investment Board

#### 3.1g First Steps Towards Action Implementation:

1. Obtain support and endorsement of the Milwaukee Area Workforce Investment Board.
2. Coordinate Job Fair planning with the overall Project Homeless Connect planning.

### 3.2 GENERAL STRATEGY: Implement a *Work-Linked Supportive Housing* Model

#### 3.2a Proposed Action:

Milwaukee will develop a *Work-linked Supportive Housing* program for people who are homeless. The pilot will test out the effectiveness of successful national examples for “vocationalized” housing in Milwaukee. Job opportunities for residents will be created in the form of “place-based” part-time work which integrates employment directly into the housing setting. These jobs may include employment with the resident management company or with the non-profit housing owner or partnering support service provider. In conjunction with employment opportunity, residents will be assisted in meeting their needs by a case manager. Unlike most supportive housing programs, the cost of rent will be assumed by the project. Participants, however, will escrow 30 percent of their income in savings accounts.

The structure of the *Work-Linked Supportive Housing* project will be oriented around work as a priority for all residents. The outcomes of this project will determine the feasibility of expanding *Work-Linked Supportive Housing* to additional similar housing sites in Milwaukee. If advisable, additional projects will be put into development in the fourth year of the 10 Year Plan and the number of projects will be brought full scale by year 10 of the Plan.

#### 3.2b Quantity of Proposed Units of Service: 40 households per year stabilized via increased income

#### 3.2c Intended Outcomes: (July 1 to June 30)

- **Year 1:** 50 percent of residents will have income from employment
- **Year 3-10:** 70 percent of residents will have income from employment

3.2d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2008/09	40	40		\$334,466	\$334,466
2010	40	80		\$334,466	\$668,892
2011	40	120		\$334,466	\$1,003,338
2012	40	160		\$334,466	\$1,337,784
2013	40	200		\$334,466	\$1,672,230
2014	40	240		\$334,466	\$2,006,676
2015	40	280		\$334,466	\$2,341,122
2016	40	320		\$334,466	\$2,675,668
2017	40	360		\$334,466	\$3,010,014
2018	40	400		\$334,466	\$3,344,460

#### 3.2e Potential Funding Options Identified/Secured:

1. The U.S. Dept of HUD - Homelessness Prevention & Rapid Re-housing Program
2. HUD HEARTH Act Funds – via local Homeless Continuum-of-care
3. Wisconsin Department of Children and Families Workforce Development
4. The U.S. DOL - Homeless Veterans Reintegration Program
5. State and Local Economic Development Programs
6. Food Stamp Employment and Training Program – via local Food Stamp Program
7. Workforce Investment Act – Title I and Title II – via the Workforce Investment Board
8. The Temporary Assistance to Needy Families Program - Emergency Contingency Fund
9. Ticket to Work Program – via the WI Department of Vocational Rehabilitation
10. The Carl Perkins Vocational and Technical Act – via community colleges
11. Senior Community Employment Program

#### 3.2f Responsible Parties:

1. Milwaukee 10 Year Plan Implementation Team
2. Milwaukee Workforce Investment Board
3. Department of Veterans Affairs

#### 3.2g First Steps Towards Action Implementation:

1. Begin feasibility assessment for project.
2. Investigate job sectors and possible place-based employment options.
3. Review outcome literature on national work-linked Chronic Homeless Initiative pilots.
4. Develop, implement, and evaluate the initial project(s) with the findings used to support replication.

# 10 Year Plan Workgroup Worksheet

## Economic Support and Employment

### 3.3 GENERAL STRATEGY: Create *Employment Opportunity Center for Supportive Housing*

#### 3.3a Proposed Action:

Create a centralized *Employment Opportunity Center* to be shared by a city-wide and county-wide umbrella group of all supportive housing providers serving formerly homeless residents. The *Employment Opportunity Center's* service teams will be housed under one non-profit organization's roof but fielded widely to all supportive housing sites and their residents' job sites in Milwaukee. Services will include soft skills training, financial literacy, individual development accounts, training coordination, employee brokers and legal services, job coaching, and job retention supports. Member housing agencies will benefit from the efficiencies of this shared resource model. Their residents' employment prospects will be bettered by having access to specialized employment expertise and job opportunities that could not be offered on the same scale by one supportive housing provider operating on its own.

**3.3b Quantity of Proposed Units of Service:** In its first year, the Employment Center will assist 100 employable residents of supportive housing in pre-paring for, gaining, and sustaining employment. By year 3 of the 10 Year Plan, the Employment Center will achieve its full scale of achieving employment outcomes for 200 new residents each year.

#### 3.3c Intended Outcomes: (July 1 to June 30)

- **Per Year:** 50% of participants will obtain family sustaining income
- **Over 10 Years:** Serve 2000 persons

3.3d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2008/09	200	200		\$1,100,000 <sup>8</sup>	\$1,100,000
2010	200	400		\$1,100,000	\$2,200,000
2011	200	600		\$1,100,000	\$3,300,000
2012	200	800		\$1,100,000	\$4,400,000
2013	200	1000		\$1,100,000	\$5,500,000
2014	200	1200		\$1,100,000	\$6,600,000
2015	200	1400		\$1,100,000	\$7,700,000
2016	200	1600		\$1,100,000	\$8,800,000
2017	200	1800		\$1,100,000	\$9,900,000
2018	200	2000		\$1,100,000	\$11,000,000

#### 3.3e Potential Funding Options Identified/Secured:

1. Business Improvement Districts and Associations
2. Employment and training supportive services including the Milwaukee Area Workforce Investment Board, Milwaukee Area Technical College, Wisconsin Workforce Development and Division of Vocational Rehabilitation, and associated employment and training organizations
3. Community Advocate Public Policy Institute to include the Opportunity Center in its overall funding proposal to address imbalances that cause poverty.
4. U.S. DOL - Homeless Veterans Reintegration Program
5. State and Local Economic Development Programs
6. Food Stamp Employment and Training Program – via local Food Stamp Program
7. Workforce Investment Act – Title I and Title II – via the Workforce Investment Board and the One Stop Career Centers
8. The Temporary Assistance to Needy Families Program - Emergency Contingency Fund and Emergency Assistance Programs
9. Ticket to Work Program – via the WI Department of Vocational Rehabilitation
10. The Carl Perkins Vocational and Technical Act – via community colleges

#### 3.3f Responsible Parties:

1. Milwaukee Continuum of Care
2. Milwaukee Area Workforce Investment Board
3. Milwaukee Area Technical College and associated training programs

#### 3.3g First Steps Towards Action Implementation:

1. Research successful examples of Shared Employment Centers including the San Francisco model.
2. Integrate project into the CA Public Policy Institute's effort to reduce poverty in Wisconsin.
3. Obtain endorsement and support of the Milwaukee Area Workforce Investment Board.

<sup>8</sup> Based on an estimated cost of \$5,500 per person per year

### 3.4 GENERAL STRATEGY: Open *New Pathways for Homeless Job Seekers*

#### 3.4a Proposed Action:

Milwaukee will open *New Pathways for Homeless Job Seekers* by carrying out a community planning process, similar to successful projects carried out elsewhere, that will proactively engage existing work-force development programs to better serve homeless people. The *New Pathways* will be developed through cross-system collaboration, improved access, and policy changes across the existing workforce development system in Milwaukee.

The intent of *New Pathways for Homeless Job Seekers* will be to better the way “mainstream” systems serve homeless people and to carve out special projects designed to meet homeless people’s needs in particular. Rather than creating entirely separate work programs for homeless people, this will be an at-tempt to mainstream the employment problems faced by homeless people and to foster accountability for homeless peoples’ needs within the city’s existing workforce development resources. The impact of this project will be better cross-system linkages, new resources, and a collaboration model made official through a multi-agency Memorandum of Agreement. Agencies and public systems to be engaged in the *New Pathways* will include: W-2, DVR, WIB and Ticket to Work, Goodwill and MAT.

**3.4b Quantity of Proposed Units of Service:** Employment training and placement will be provided to 1,500 homeless and/or formerly homeless job seekers in Milwaukee. All public and non-profit partners in the *New Pathways for Homeless Job Seekers* project will begin to track homelessness status of participants and provide data on their outcomes such that the project can be assessed over time.

#### 3.4c Intended Outcomes: (July 1 to June 30)

- **Per Year:** 1500 homeless or at risk of homeless will effectively be served by the Workforce Investment Board, Goodwill, W-2, DVR, or “Ticket to Work” to receive employment related services
- **Over 10 Years:** 15,000 homeless or at imminent risk of homeless or will be effectively served by the existing systems.

3.4d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	1500	1500		\$65,000	\$65,000 <sup>9</sup>
2011	1500	3000		\$65,000	\$130,000
2012	1500	4500		\$65,000	\$195,000
2013	1500	6000		\$65,000	\$250,000
2014	1500	7500		\$65,000	\$315,000
2015	1500	9000		\$65,000	\$380,000
2016	1500	10,500		\$65,000	\$445,000
2017	1500	12,000		\$65,000	\$510,000
2018	1500	13,500		\$65,000	\$575,000
2019	1500	15,000		\$65,000	\$650,000

#### 3.4e Potential Funding Options Identified/Secured:

1. Employment and training supportive services MAWIB, MATC, Wisconsin DWD & DVR
2. U.S. Dept of HUD HEARTH Program - SHP Employment related Supportive Services Funds.
3. The U.S. DOL - Homeless Veterans Reintegration Program
4. State and Local Economic Development Programs
5. Food Stamp Employment and Training Program – via local Food Stamp Program
6. Workforce Investment Act – Title I and Title II – via the Workforce Investment Board
7. The Temporary Assistance to Needy Families Program - Emergency Contingency Fund and

#### 3.4f Responsible Parties:

1. Milwaukee CoC Nonprofit Project Sponsors
2. MAWIB, MATC, Ticket to Work (Social Security Administration)

#### 3.4g First Steps Towards Action Implementation:

1. Outreach to employment and training systems in Milwaukee.
2. Review the community planning process carried out in King County, WA (Seattle) and its outcomes.
3. Obtain endorsement and support of the Milwaukee Area Workforce Investment Board.

<sup>9</sup> Cost is for coordinator position for meetings.

### 3.5 GENERAL STRATEGY: Study Feasibility of a *Job Creating Social Enterprise*

#### 3.5a Proposed Action:

Milwaukee will carry out a feasibility study of the options for developing a *Job Creating Social Enterprise* to employ people who are/were homeless. To staff this research project, students from local Business Administration departments in Milwaukee's higher education institutions will be recruited to perform the analysis in conjunction with their course work. The students will explore business opportunities in Milwaukee that can be combined with the mission of creating jobs for people who are homeless. Such an enterprise would fill a void in the local job sector of opportunities for people with limited employment experience to earn a living wage. The enterprise would also provide a positive transition into workforce participation.

This feasibility study will analyze social enterprise models and mission driven businesses in other comparable cities across the U.S. that have been successful with employing a homeless and formerly homeless workforce. Among other models, Milwaukee will explore options for linking a social enterprise with city and county agencies that contract for public works including sanitation, public parks maintenance, and street cleaning. Other business sectors, with track records of success in homeless employment in other cities, to be explored will include landscaping, baking, catering, furniture moving, urban farming, house painting, retailing via thrift stores, and packaging.

#### 3.5b Quantity of Proposed Units of Service: To be determined by feasibility study

#### 3.5c Intended Outcomes: (July 1 to June 30)

- **Per Year:** To be determined by feasibility study
- **Over 10 Years:** To be determined by feasibility study

3.5d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	Plan developed		\$20,000		\$20,000
2011					\$20,000
2012					\$20,000
2013					\$20,000
2014					\$20,000
2015					\$20,000
2016					\$20,000
2017					\$20,000
2018					\$20,000
2019					\$20,000

#### 3.5e Potential Funding Options Identified/Secured:

1. Local small business development grants
2. Local and state business incubator start-up grants
3. Private bank business loans

#### 3.5f Responsible Parties:

1. Milwaukee Continuum of Care
2. Non-profits with an interest in exploring social enterprise opportunities
3. University/college departments of business administration

#### 3.5g First Steps Towards Action Implementation:

1. Outreach to Departments of Business Administration at local higher education institutions.
2. Collect list of examples of social enterprise serving homeless including CARA in Chicago.
3. Develop scope of work and six month timeframe for Feasibility Study to be completed.
4. Review Feasibility Study and plan from there.

# **Mental Health, Substance Abuse, and Support Services Action Plan**





# 10 Year Plan Workgroup Worksheet

## Mental Health, Substance Abuse, and Support Services

### 2.1 GENERAL STRATEGY: Advance Advocacy Campaign for Supportive Services Funding

#### 2.1a Proposed Action:

Milwaukee will make new advances to an existing *Advocacy Campaign* to secure service funding in permanent supportive housing statewide. This new advancement will bring Milwaukee more in concert with other regional and statewide homeless consortiums in Wisconsin to seek state funding of services in permanent supportive housing. The *Advocacy Campaign's* goal will be to produce a coordinated message, representative of all regions of Wisconsin affected by homelessness, of the cost effectiveness of state level public investment in supportive housing services. Financing models created by other states that have successfully filled this funding gap will be evaluated and recommended for replicability in Wisconsin.

The *Advocacy Campaign's* outcome will be a secure and sustainable state-level funding source that is packaged to coordinate with federal funding streams for the development and operations of permanent supportive housing. Ultimately, state funding secured through the *Advocacy Campaign* will harness more federal monies for housing to address homelessness in Milwaukee and elsewhere and will facilitate creation of a more extensive and sustainable supportive housing inventory.

Funding brought about by the *Advocacy Campaign* will be used in Milwaukee to finance home-based services needed by formerly homeless people with disabilities such as serious mental illness and long term substance abuse to sustain housing. These services will include case management, peer support specialist services, and other stabilization interventions.

#### 2.1b Quantity of Proposed Units of Service: 320 former homeless persons to be stabilized in housing in Milwaukee if Campaign is successful

#### 2.1c Intended Outcomes:

- **Per Year:** 32 units of supportive housing in Milwaukee
- **Over 10 Years:** 320 units of supportive housing in Milwaukee

2.1d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	32	32		\$64,000 <sup>4</sup>	
2011	32	64		\$128,000	
2012	32	96		\$192,000	
2013	32	128		\$256,000	
2014	32	160		\$320,000	
2015	32	192		\$384,000	
2016	32	224		\$448,000	
2017	32	256		\$512,000	
2018	32	288		\$576,000	
2019	32	320		\$640,000	\$3,520,000

#### 2.1e Potential Funding Options Identified/Secured:

1. WI General Public Revenue – via options such as Real Estate Tax levy etc.
2. WI Department of Commerce
3. WI Department of Mental Health

#### 2.1f Responsible Parties:

1. Milwaukee Continuum of Care
2. Commission on Supportive Housing
3. Lobbyists and advocacy organizations representing people with disabilities
4. Wisconsin Coalition to End Homelessness

#### 2.1g First Steps Towards Action Implementation:

1. Review examples in states of Minnesota, Connecticut, Washington, and Louisiana.
2. Convene meeting of statewide homeless consortiums and PSH developers/owners.
3. Bring the advocacy campaign to a comprehensive, statewide scale.

<sup>4</sup> Working assumptions: (1) \$2,000 per person supportive services supplement; this funding source would not cover entire supportive services cost. (2) Supportive services levels would vary by type of housing/target population; this figure should be considered an average cost. (3) Estimate will be further refined based on Illinois Supportive Housing Fund formula.



# 10 Year Plan Workgroup Worksheet

## Mental Health, Substance Abuse, and Support Services

### 2.2 GENERAL STRATEGY: Expand Social Security Opportunity Advocacy and Recovery

#### 2.2a Proposed Action:

Milwaukee will expand the existing *Social Security Opportunity Advocacy and Recovery (SOAR)* program which assists people who are homeless with disabilities to access the public benefits of SSI, SSDI, and Medicaid. Through such an expansion, this current high-demand program will widen its staff capacity by adding additional Benefits Specialist(s) and Case Manager(s) to be scaled up over the course of 10 years.

Through this expanded *SOAR* program, Milwaukee will improve its track record for increasing the likelihood that homeless applicants for public benefits overcome the myriad obstacles to obtaining these resources for which they are eligible but frequently fail to secure and maintain. Those individuals and families that secure public benefits through the *SOAR* program will be better positioned to exit homelessness and maintain housing for the long term. On a systems level, the expanded *SOAR* program will begin coordinating with the local SSA and DDS offices in Milwaukee to implement public systems change adjustments that have been successful in other communities for further improving the likelihood that people who are homeless obtain benefits. These may include designing special provisions for homeless applicants.

#### 2.2b Quantity of Proposed Units of Service: 905

#### 2.2c Intended Outcomes:

- **Per Year:** 35, 70, and then 100 annually
- **Over 10 Years:** 905

2.3d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs <sup>5</sup>	Cumulative Costs
2010	35	35		\$87,500	\$87,500
2011	70	105		\$175,000	\$262,500
2012	100	205		\$250,000	\$512,500
2013	100	305		\$250,000	\$762,500
2014	100	405		\$250,000	\$1,012,500
2015	100	505		\$250,000	\$1,262,500
2016	100	605		\$250,000	\$1,512,500
2017	100	705		\$250,000	\$1,762,500
2018	100	805		\$250,000	\$2,012,500
2019	100	905		\$250,000	\$2,262,500

#### 2.2e Potential Funding Options Identified/Secured:

1. U.S. Department of HUD Homelessness Prevention and Rapid Re-Housing Fund
2. SAMHSA funding for *SOAR* trainings in Wisconsin
3. Private foundations such as Healthier Wisconsin Partnership Program
4. Private hospitals in Milwaukee and Federally Qualified Health Centers (FQHC)
5. Milwaukee County Family Care – Disability Benefits Center

#### 2.2f Responsible Parties:

1. 10 Year Plan Implementation Team
2. Milwaukee County Behavioral Health Division
3. Wisconsin Statewide Working Group for SSI Access

#### 2.2g First Steps Towards Action Implementation:

1. Develop a community collaborative to implement the expanded *SOAR*.
2. Research sustainable funding to replace HPRP resources after Year 3 of 10 Year Plan.
3. Begin cross-system planning meetings between local SSA and DDS and 10 Year Plan.

<sup>5</sup> Current *SOAR* cost is \$2,500 per unit exclusive of case management; cost needs to be adjusted for future years to reflect normal increases in staffing costs.

# 10 Year Plan Workgroup Worksheet

## Mental Health, Substance Abuse, and Support Services

### 2.3 GENERAL STRATEGY: Develop *Standards of Care* for Permanent Supportive Housing

#### 2.3a Proposed Action:

Milwaukee will develop *Standards of Care* for all Permanent Supportive Housing in Milwaukee to ensure that all formerly homeless persons who reside in service enriched housing benefit from national evidence-based best practices that are guided by the most enlightened and widely accepted national principles. These principles will include the importance of consumer choice, recovery approaches, asset based service modeling, motivational interviewing, and stages of change concepts. The best practices will include use of peer specialists, adherence to landlord-tenant law, implementation of harm reduction paradigms, and encouragement of voluntary arrangements for participation in service provision.

To educate permanent supportive housing providers about Milwaukee's *Standards of Care*, a system of peer evaluation and monitoring for consistency with the standards will be implemented as has been successfully carried out in other communities with similar objectives. In conjunction with development of these *Standards of Care*, Milwaukee will seek opportunities to bring trainings sponsored by national intermediary organizations on evidence-based best practices in permanent supportive housing to the City.

The *Standards of Care* project will focus initially on educating all new Permanent Supportive Housing units but would become established as a Continuum of Care best practice standard and be applied to all HUD-funded Permanent Supportive Housing projects through the annual project review and ranking process.

#### 2.3b Quantity of Proposed Units of Service: One *Standards of Care* project to be completed

#### 2.3c Intended Outcomes:

- **Per Year:** 32 new units
- **Over 10 Years:** 320 (new units) plus Continuum of Care's existing PH inventory (as appropriate)

2.3d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs <sup>6</sup>	Cumulative Costs
2010	126	126		\$25,000	\$25,000
2011	126	252		\$25,000	\$50,000
2012	126	378		\$25,000	\$75,000
2013	126	504		\$25,000	\$100,000
2014	126	630		\$25,000	\$125,000
2015	126	756		\$25,000	\$150,000
2016	126	883		\$25,000	\$175,000
2017	126	1,008		\$25,000	\$200,000
2018	126	1,134		\$25,000	\$225,000
2019	126	1,260		\$25,000	\$250,000

#### 2.3e Potential Funding Options Identified/Secured:

1. Milwaukee Continuum of Care
2. Private foundations

#### 2.3f Responsible Parties:

1. Milwaukee Continuum of Care
2. Commission on Supportive Housing
3. Milwaukee Mental Health Task Force
4. National intermediaries: Corporation for Supportive Housing, Abt Associates, TAC Inc.

#### 2.3g First Steps Towards Action Implementation:

1. Convene working group to select guiding principles and best practices for the Standards
2. Develop tool outlining best practices Milwaukee will adopt
3. Develop a peer review process – coordinate with existing project review and ranking system.

<sup>6</sup> Milwaukee's Standards of Care and monitoring system development will be completed by the Continuum of Care and incorporated into the CoC annual operating budget; monitoring activities would be subcontracted to a consumer satisfaction entity, i.e. Vital Voices, cost to be determined.

# 10 Year Plan Workgroup Worksheet

## Mental Health, Substance Abuse, and Support Services

### 2.4 GENERAL STRATEGY: Create a *Voice for the Homeless Plan*

#### 2.4a Proposed Action:

Milwaukee will create a *Voice for the Homeless Plan* to ensure representation from constituents of the homeless service and housing arena in Milwaukee in all planning initiatives sponsored by the City and County that impact upon homeless resources and populations. The intent is to uphold the interests of people who are homeless which are often left out in the development of community plans and system improvement initiatives. Specific intended outcomes are: identifying alternative and sustainable sources of revenue for homeless services, improving access to mainstream benefits and supportive services for people who are homeless and enhancing consumer involvement in policy and program decision-making.

In conjunction with the *Voice for the Homeless Plan*, a Speakers' Bureau that engages people who are formerly homeless as public representatives will be created and deployed in conjunction with 10 Year Plan implementation and in association with other forms of consumer decision-making. Ultimately, the *Voice for the Homeless Plan* will move Milwaukee forward in ensuring that solutions to homelessness are not assigned primarily to the purview of the homeless service and housing arena but are, instead, an assumed responsibility of all public mainstream systems.

#### 2.4b Quantity of Proposed Units of Service: One system wide *Voice for the Homeless Plan*

#### 2.4c Intended Outcomes:

- **Per Year:** 1,500 homeless people to benefit from *Voice for the Homeless* at any one time
- **Over 10 Years:** 1,500 homeless people to benefit from *Voice for the Homeless* at any one time

2.4d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	Not applicable			No costs	
2011					
2012					
2013					
2014					
2015					
2016					
2017					
2018					
2019					

#### 2.4e Potential Funding Options Identified/Secured:

1. No funding required

#### 2.4f Responsible Parties:

1. Milwaukee Continuum of Care
2. Homeless consumer representation entities

#### 2.4g First Steps Towards Action Implementation:

1. Publicize the *Voice for the Homeless* to public officials and community planners
2. Create a bureau of representatives from the homeless service and housing arena
3. Engage consumers in a 10 Year Plan Speakers' Bureau and Consumer Involvement Team
4. Ensure *Voice for the Homeless* representation with: Plans issued by State Division of Health
5. Ensure *Voice for the Homeless* representation with: Community Mental Health Plan
6. Ensure *Voice for the Homeless* representation with: Milwaukee County 1915 (i) Plan
7. Ensure *Voice for the Homeless* representation with: Milwaukee Addiction Treatment Initiative
8. Ensure *Voice for the Homeless* representation with: Neighborhood-based planning activity

# 10 Year Plan Workgroup Worksheet

## Mental Health, Substance Abuse, and Support Services

### 2.5 GENERAL STRATEGY: Peer Homeless Peer Support Capacity

#### 2.5a Proposed Action:

Milwaukee will develop new *Homeless Peer Support Capacity* to be made up of formerly homeless people. This Capacity will consist of Peer Specialists who will be employed part-time to assist those who are currently homeless, particularly persons who have been chronically homeless, in exiting shelter and assimilating to life in permanent housing and in mainstream, residential communities. The *Peer Support Capacity* will complement existing health, mental health, and case management services available for homeless people in Milwaukee by offering culturally competent assistance that can only be extended by those who have personal experiences with homelessness, recovery, and adjustment to life in housing after years on the margins of society.

Milwaukee's new *Homeless Peer Support Capacity* will be developed in conjunction with two models of peer support service that currently exist in Milwaukee. These models will be expanded to the homeless arena and populations. The first translated model will be a Resident Manager role in transitional or permanent supportive housing whereby a Peer Specialist, indigenous to the population living in the housing setting, is hired to live in and fulfill management responsibilities. The second is a training program where-by formerly homeless individuals will attend skills sessions on effective peer mentoring and then be certified as specialists available for hire by non-profit and government agencies assisting the homeless. By expanding these models that now exist in Milwaukee into the new *Homeless Peer Support Capacity*, Milwaukee will be capitalizing on its history of innovativeness in the peer support arena and adding another cost effective dimension to its solutions to homelessness.

#### 2.5b Quantity of Proposed Units of Service: 100 Peer Support Specialists to be trained

#### 2.5c Intended Outcomes:

- **Per Year:** 10 new Peer Support Specialists added each year for six years
- **Over 10 Years:** Reach a goal of 60 Peer Support Specialists deployed city-wide

2.5d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	10	10		\$10,000 <sup>7</sup>	\$10,000
2011	10	20		\$10,000	\$20,000
2012	10	30		\$10,000	\$30,000
2013	10	40		\$10,000	\$40,000
2014	10	50		\$10,000	\$50,000
2015	10	60		\$10,000	\$60,000
2016	10	70		\$10,000	\$70,000
2017	10	80		\$10,000	\$80,000
2018	10	90		\$10,000	\$90,000
2019	10	100		\$10,000	\$100,000

#### 2.5e Potential Funding Options Identified/Secured:

1. National and local entities providing funding for current peer support activities
2. Private foundations
3. Salaries to hire *Peer Support Specialists* to be provided by Milwaukee non-profit organizations

#### 2.5f Responsible Parties:

1. Milwaukee Continuum of Care
2. Guest House Resident Manager Training Program
3. Our Space Peer Support Specialist Training Program
4. Advocacy organizations representing veterans, persons with disabilities, child welfare etc.

#### 2.5g First Steps Towards Action Implementation:

1. Convene meeting of existing Peer Support agencies in Milwaukee.
2. Review options for expanding Peer Support into the homeless service and housing arena.
3. Establish goals, linkages, and recruitment/training plan.
4. Develop Action Plan and timeline for building the *Homeless Peer Support Capacity*

<sup>7</sup> Based on an estimated cost of \$1,000 for training one peer support specialist

# Permanent Housing Action Plan



### 4.1 GENERAL STRATEGY: Implement *Campaign to House the Homeless* by Leveraging McKinney Vento Samaritan Funds

#### 4.1a Proposed Action:

Implement a *Milwaukee Campaign to House the Homeless* by creating 1,260 new units of Permanent Supportive Housing (PSH) via new construction and rehabilitation projects.

Assist the construction of these new housing units in the *Milwaukee Campaign* by providing gap funding using U.S. Department of HUD McKinney Vento Supportive Housing Bonus funds.

Obtain annual commitments each year from Milwaukee Homeless Continuum of Care (CoC) to leverage the Supportive Housing Bonus funds made available through the HUD McKinney Vento Homeless Funds.

#### 4.1b Quantity of Proposed Units of Service: 200 units of housing

#### 4.1c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 20 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 200 units over ten years

4.1d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	20	20	\$400,000		\$400,000
2010	20	40	\$400,000		\$800,000
2012	20	60	\$400,000		\$1,200,000
2013	20	80	\$400,000		\$1,600,000
2014	20	100	\$400,000		\$2,000,000
2015	20	120	\$400,000		\$2,400,000
2016	20	140	\$400,000		\$2,800,000
2017	20	160	\$400,000		\$3,200,000
2018	20	180	\$400,000		\$3,600,000
2019	20	200	\$400,000		\$4,000,000

#### 4.1e Potential Funding Options Identified/Secured:

1. Samaritan Housing Initiative Project bonus (calculated as per HUD's rule at 15 percent of the CoC's preliminary pro rata share).

#### 4.1f Responsible Parties:

1. 10 Year Plan Implementation Team
2. Milwaukee Continuum of Care
3. Milwaukee CoC sub-grantee to become project sponsor

#### 4.1g First Steps Towards Action Implementation:

In 2010 -2019, the CoC will continue to apply for HUD's Samaritan Bonus funds for the purpose of continued PSH development activity contingent upon these HUD resources continuing to be made available in the NOFA from year to year.

### 4.2 GENERAL STRATEGY: Implement *Campaign to House the Homeless* by Leveraging State of WI Low Income Housing Tax Credits

#### 4.2a Proposed Action:

Implement a *Milwaukee Campaign to House the Homeless* by creating 1,260 new units of Permanent Supportive Housing (PSH) via new construction and rehabilitation projects.

Assist the construction of these new PSH units in the *Milwaukee Campaign* by providing gap funding using **Low Income Housing Tax Credit** (LIHTC) and capitalizing upon Milwaukee's policy of a set-aside of these funds for this express purpose

Generate interest and commitment from Milwaukee non-profit and for profit developers and non-profit social service providers to apply to Wisconsin Housing and Economic Development Authority (WHEDA) for LIHTCs to produce permanent supportive housing units. Ensure that there is continued interest in sustaining the development pipeline over the next 10 years.

#### 4.2b Quantity of Proposed Units of Service: 1,260 units of housing Assist in the construction of 126 new units per year.

#### 4.2c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 126 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 1,260 units over ten years

4.2d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	126		\$18,640,446		\$18,640,446
2011	126	252	\$18,640,446		\$37,280,892
2012	126	378	\$18,640,446		\$55,921,338
2013	126	504	\$18,640,446		\$74,561,784
2014	126	630	\$18,640,446		\$93,202,230
2015	126	756	\$18,640,446		\$111,842,676
2016	126	882	\$18,640,446		\$130,483,122
2017	126	1,008	\$18,640,446		\$149,123,568
2018	126	1,134	\$18,640,446		\$167,764,014
2019	126	1,260	\$18,640,446		\$186,404,460

#### 4.2e Potential Funding Options Identified/Secured:

1. WHEDA's Low Income Housing Tax Credits

#### 4.2f Responsible Parties:

1. Local developers and potential developers of permanent supportive housing
2. Milwaukee area social service providers
3. Wisconsin's Affordable Housing Locator

#### 4.2g First Steps Towards Action Implementation:

1. Actively recruit applicants to WHEDA for 2010 and thereafter for the Campaign.
2. Coordinate with WI's Affordable Housing Locator to attract potential developers with assurances of pools of applicants and low vacancy rates in housing added to the inventory.
3. Engage in discussions with WHEDA to prioritize the use of Exchange Funds for supportive housing projects and to increase the supportive housing set-aside.

### 4.3 GENERAL STRATEGY: Implement *Campaign to House the Homeless* by Leveraging the Milwaukee County's Community Development Block Grant

#### 4.3a Proposed Action:

Implement a *Milwaukee Campaign to House the Homeless* by creating 1,260 new units of Permanent Supportive Housing (PSH) via new construction and rehabilitation projects.

Assist the construction of these new housing units in the Milwaukee Campaign by providing gap funding using Milwaukee County's **Community Development Block Grant** (CDBG) funds.

Coordinate intentions of the 10 Year Plan with Milwaukee County officials to obtain a commitment of a regular set-aside of the CDBG allocation for development of permanent supportive housing projects in conjunction with the Milwaukee Campaign.

#### 4.3b Quantity of Proposed Units of Service: Assist in the construction of 126 new units per year.

#### 4.3c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 126 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 1,260 units over ten years

4.3d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	126		TBD		TBD
2011	126	252	TBD		TBD
2012	126	378	TBD		TBD
2013	126	504	TBD		TBD
2014	126	630	TBD		TBD
2015	126	756	TBD		TBD
2016	126	882	TBD		TBD
2017	126	1,008	TBD		TBD
2018	126	1,134	TBD		TBD
2019	126	1,260	TBD		TBD

#### 4.3e Potential Funding Options Identified/Secured:

1. Milwaukee County CDBG

#### 4.3f Responsible Parties:

1. Milwaukee Continuum of Care
2. Milwaukee County

#### 4.3g First Steps Towards Action Implementation:

1. Review of other cities in the U.S. that have made the set-aside commitment.
2. Representatives of 10 Year Plan seek adoption of a set-aside of CDBG funds.
3. Adoption of a CDBG set-aside for permanent supportive housing.



### 4.4 GENERAL STRATEGY: Implement *Campaign to House the Homeless* by Leveraging the City of Milwaukee's Community Development Block Grant

#### 4.4a Proposed Action:

Implement a *Milwaukee Campaign to House the Homeless* by creating 1,260 new units of Permanent Supportive Housing (PSH) via new construction and rehabilitation projects.

Assist the construction of these new PSH units in the Milwaukee Campaign by providing gap funding using the City of Milwaukee's **Community Development Block Grant** (CDBG) funds.

Coordinate intentions of the 10 Year Plan with City of Milwaukee officials and negotiate to set aside five percent of its CDBG allocation for permanent supportive housing projects.

#### 4.4b Quantity of Proposed Units of Service: Assist in the construction of 126 new units per year.

#### 4.4c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 126 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 1,260 units over ten years

4.4d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	126		TBD		TBD
2011	126	252	TBD		TBD
2012	126	378	TBD		TBD
2013	126	504	TBD		TBD
2014	126	630	TBD		TBD
2015	126	756	TBD		TBD
2016	126	882	TBD		TBD
2017	126	1,008	TBD		TBD
2018	126	1,134	TBD		TBD
2019	126	1,260	TBD		TBD

#### 4.4e Potential Funding Options Identified/Secured:

1. City of Milwaukee CDBG allocationG

#### 4.4f Responsible Parties:

1. Milwaukee Continuum of Care
2. City of Milwaukee Officials

#### 4.4g First Steps Towards Action Implementation:

1. Review process of other cities in the U.S. that have made the set-aside commitment.
2. Representatives of 10 Year Plan seek adoption of a set-aside of CDBG funds.
3. Adoption of a CDBG set-aside for permanent supportive housing.

### 4.5 GENERAL STRATEGY: Implement *Campaign to House the Homeless* by Leveraging the City of Milwaukee's Local Housing Trust Fund

#### 4.5a Proposed Action:

Implement a *Milwaukee Campaign to House the Homeless* by creating 1,260 new units of Permanent Supportive Housing (PSH) via new construction and rehabilitation projects.

Assist the construction of these new PSH units in the *Milwaukee Campaign* by providing gap funding using the City of Milwaukee's Local **Housing Trust Fund**.

Coordinate intentions of the 10 Year Plan the City of Milwaukee to obtain a commitment of \$450,000 of local Housing Trust Fund dollars annually for ten years for development of PSH in conjunction with the *Milwaukee Campaign*.

#### 4.5b Quantity of Proposed Units of Service: Assist in the construction of 126 new units per year.

#### 4.5c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 126 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 1,260 units over ten years

4.5d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	126	126	\$400,000		\$400,000
2011	126	252	\$400,000		\$800,000
2012	126	378	\$400,000		\$1,200,000
2013	126	504	\$400,000		\$1,600,000
2014	126	630	\$400,000		\$2,000,000
2015	126	756	\$400,000		\$2,400,000
2016	126	882	\$400,000		\$2,800,000
2017	126	1,008	\$400,000		\$3,200,000
2018	126	1,134	\$400,000		\$3,800,000
2019	126	1,260	\$400,000		\$4,200,000

#### 4.5e Potential Funding Options Identified/Secured:

1. City of Milwaukee's Housing Trust Fund

#### 4.5f Responsible Parties:

1. Milwaukee Continuum of Care
2. City of Milwaukee
3. Local Housing Trust Fund Board

#### 4.5g First Steps Towards Action Implementation:

1. Representatives of 10 Year Plan negotiate for annual commitment of Trust Fund.
2. Secure annual Housing Trust Fund allocation to be used for the *Milwaukee Campaign*.

### 4.6 GENERAL STRATEGY: Implement *Campaign to House the Homeless* by Leveraging Milwaukee County's Special Needs Housing Trust Fund

#### 4.6a Proposed Action:

Implement a *Milwaukee Campaign to House the Homeless* by creating 1,260 new units of Permanent Supportive Housing (PSH) via new construction and rehabilitation projects.

Assist the construction of these new PSH units in the *Milwaukee Campaign* by providing gap funding using the Milwaukee County's Local **Special Needs Housing Trust Fund**.

Coordinate intentions of the 10 Year Plan with Milwaukee County to obtain a commitment of local Housing Trust Fund dollars annually for ten years for development of PSH in conjunction with the *Milwaukee Campaign*.

#### 4.6b Quantity of Proposed Units of Service: Assist in the construction of 126 new units per year.

#### 4.6c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 126 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 1,260 units over ten years

4.6d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	126		\$1,000,000		\$1,000,000
2011	126	252	\$1,000,000		\$2,000,000
2012	126	378	\$1,000,000		\$3,000,000
2013	126	504	\$1,000,000		\$4,000,000
2014	126	630	\$1,000,000		\$5,000,000
2015	126	756	\$1,000,000		\$6,000,000
2016	126	882	\$1,000,000		\$7,000,000
2017	126	1,008	\$1,000,000		\$8,000,000
2018	126	1,134	\$1,000,000		\$9,000,000
2019	126	1,260	\$1,000,000		\$10,000,000

#### 4.6e Potential Funding Options Identified/Secured:

1. Milwaukee County's local Special Needs Housing Trust Fund

#### 4.6f Responsible Parties:

1. Milwaukee Continuum of Care
2. County of Milwaukee

#### 4.6g First Steps Towards Action Implementation:

1. Representatives of 10 Year Plan negotiate for annual commitment of Trust Fund.
2. Review of other counties in the U.S. that have used local trust funds for this purpose.
3. Secure annual Special Needs Housing Trust Fund allocation to be used for the Milwaukee Campaign.

### 4.7 GENERAL STRATEGY: Implement *Campaign to House the Homeless* by Leveraging the City of Milwaukee's HOME funds

#### 4.7a Proposed Action:

Implement a *Milwaukee Campaign to House the Homeless* by creating 1,260 new units of Permanent Supportive Housing (PSH) via new construction and rehabilitation projects.

Assist the construction of these new PSH units in the *Milwaukee Campaign* by developing a set-aside of local City of Milwaukee's **HOME** allocation to be used for gap funding.

Coordinate intentions of the 10-Year Plan with the City of Milwaukee to obtain a commitment of a set-aside of its HOME allocation for permanent supportive housing projects that are part of the *Milwaukee Campaign*.

#### 4.7b Quantity of Proposed Units of Service: Assist in the construction of 126 new units per year.

#### 4.7c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 126 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 1,260 units over ten years

4.7d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	126	126	TBD		TBD
2011	126	252	TBD		TBD
2012	126	378	TBD		TBD
2013	126	504	TBD		TBD
2014	126	630	TBD		TBD
2015	126	756	TBD		TBD
2016	126	882	TBD		TBD
2017	126	1,008	TBD		TBD
2018	126	1,134	TBD		TBD
2019	126	1,260	TBD		TBD

#### 4.7e Potential Funding Options Identified/Secured:

1. Local City of Milwaukee HOME funds

#### 4.7f Responsible Parties:

1. Milwaukee Continuum of Care
2. City of Milwaukee

#### 4.7g First Steps Towards Action Implementation:

1. Review of other cities in the U.S. that have made the set-aside commitment.
2. Representatives of 10 Year Plan negotiate for adoption of a set-aside of HOME funds.
3. Adoption of a HOME set-aside in Milwaukee.

### 4.8 GENERAL STRATEGY: Implement *Campaign to House the Homeless* by Leveraging Milwaukee County HOME funds

#### 4.8a Proposed Action:

Implement a *Milwaukee Campaign to House the Homeless* by creating 1,260 new units of Permanent Supportive Housing (PSH) via new construction and rehabilitation projects.

Assist the construction of these new PSH units in the *Milwaukee Campaign* by developing a set-aside of local Milwaukee County **HOME** funds to be used for gap funding.

Coordinate intentions of the 10 Year Plan with the City of Milwaukee to obtain a commitment of a set-aside of ten percent of its HOME allocation for permanent supportive housing projects that are part of the *Milwaukee Campaign*.

#### 4.8b Quantity of Proposed Units of Service: Assist in the construction of 126 new units per year.

#### 4.8c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 126 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 1,260 units over ten years

4.8d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	126	126	TBD		TBD
2011	126	252	TBD		TBD
2012	126	378	TBD		TBD
2013	126	504	TBD		TBD
2014	126	630	TBD		TBD
2015	126	756	TBD		TBD
2016	126	882	TBD		TBD
2017	126	1,008	TBD		TBD
2018	126	1,134	TBD		TBD
2019	126	1,260	TBD		TBD

#### 4.8e Potential Funding Options Identified/Secured:

1. Milwaukee County HOME funds

#### 4.8f Responsible Parties:

1. Milwaukee Continuum of Care
2. Milwaukee County

#### 4.8g First Steps Towards Action Implementation:

1. Review of other counties in the U.S. that have made the set-aside commitment.
2. Representatives of 10 Year Plan negotiate for adoption of a set-aside of HOME funds.
3. Adoption of 10 percent HOME set-aside in Milwaukee County.

### 4.9 GENERAL STRATEGY: Develop a *Supportive Housing Community Siting Plan*

#### 4.9a Proposed Action:

Develop a *Supportive Housing Community Siting Plan* for Milwaukee that will assist in combating zoning barriers and the problematic use of these regulations to oppose development of permanent supportive housing for populations with disabilities including people who are homeless.

The *Community Siting Plan* will help Milwaukee move beyond its history of Not In My Back Yard (NIMBY) community resistance to supportive housing and into one where such housing is perceived widely as an investment in community stability with mutual benefits for both residents and neighboring communities. This *Community Siting Plan* will be a tool to be used as an organized response to zoning obstacles which have been identified as the largest local barrier in Milwaukee to the development of supportive housing.

The *Community Siting Plan* will be developed by a working group of local stakeholders convened to research existing zoning codes and make recommendations for siting supported housing in all areas of the City and County. This working group will review research and best practice analysis carried out in conjunction with the development of the 10 Year Plan on zoning strategies. The product will be a written Plan Community Siting Plan with timelines and, if necessary, identified financial resources to publicize it.

**4.9b Quantity of Proposed Units of Service:** Community Siting Plan will help make possible 126,000 units of permanent supportive housing

#### 4.9c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 126 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 1,260 units over ten years

4.9d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
				\$10,000	\$10,000
2010					
2011					
2012					
2013					
2014					
2015					
2016					
2017					
2018					
2019					\$10,000

#### 4.9e Potential Funding Options Identified/Secured:

1. Community Advocates Public Policy Institute staff support
2. Fair Housing Agency
3. Milwaukee Continuum of Care

#### 4.9f Responsible Parties:

1. City of Milwaukee Officials
2. County of Milwaukee Officials
3. Community Advocates Public Policy Institute

#### 4.9g First Steps Towards Action Implementation:

1. Assess current informal practices in use to assist homeless tenants denied housing.
2. Develop a consortium of willing affordable housing providers.
3. Create Memorandum of Agreement with mutually agreed upon standards of admission.

### 4.10 GENERAL STRATEGY: Create a *Housing Access Partnership for Milwaukee*

#### 4.10a Proposed Action:

Create a *Housing Access Partnership for Milwaukee* for reducing housing barriers commonly experienced by people who are homeless when applying to existing publicly assisted housing. The partner-ships will be established between Milwaukee's emergency shelters and a group of willing affordable housing property owners. The Partnership will negotiate adjustments in screening criteria and admissions processes for homeless applicants who have criminal records, poor credit histories, and poor or nonexistent housing histories. In so doing, homeless people will experience more ready and equitable access to the existing inventory of publicly assisted affordable housing.

The partnership will utilize a set of mutually agreed upon methods and incentives to gain the trust and cooperation of participating property owners. These methods may include documentation of tenants' merits as prospective tenants and commitments from shelter providers to offer landlords ongoing support and mediation services in the event conflicts or issues arise. Other methods may include the offer of financial incentives to reinforce security deposits and protect against rent arrears. Outcome data will be tracked to measure the impact of the program on homeless people's housing access.

**4.10b Quantity of Proposed Units of Service:** *Housing Access Partnership* will help make possible 126,000 units of permanent supportive housing

#### 4.10c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 126 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 1,260 units over ten years

4.10d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2008/09	100	100		Costs incorporated into the Milwaukee Continuum of Care operations.	
2010	200	200			
2011	200	200			
2012	200	200			
2013	200	200			
2014	200	200			
2015	200	200			
2016	200	200			
2017	200	200			
2018	200	200			

#### 4.10e Potential Funding Options Identified/Secured:

1. Private Foundation – for planning grant
2. Fair Housing Agency
3. Milwaukee Continuum of Care

#### 4.10f Responsible Parties:

1. City of Milwaukee Officials
2. County of Milwaukee Officials
3. Community Advocates Public Policy Institute

#### 4.10g First Steps Towards Action Implementation:

1. Assess current informal practices in use to assist homeless tenants denied housing.
2. Develop a consortium of willing affordable housing providers.
3. Negotiate methods and incentives to be used to facilitate access.
4. Create Memorandum of Agreement with mutually agreed upon standards of admission

### 4.11 GENERAL STRATEGY: Create *Additional Homeless Housing*

#### 4.11a Proposed Action:

Milwaukee will continually explore new opportunities that become available over the next 10 years to *Create Additional Homeless Housing* that can fill unmet needs in Milwaukee. This strategy is developed as a method of exceeding the 1,260 unit goal set for the *Milwaukee Campaign for New Permanent Supportive Housing*. This Additional Housing strategy will be a response to 10 Year Plan research that identified a need for homeless housing that exceeds 1,260 units.

Adding to the pipeline of homeless housing over the next 10 years will be accomplished by tracking and capitalizing upon other new and untried financing opportunities that are anticipated for the coming years but are not currently secured at the writing of this 10 Year Plan. These resources will be systematically studied and their potential for creating new homeless housing will be capitalized upon as the 10 Year Plan unfolds. Strategies may include:

- Use the recently authorized but not yet available new **Section 811 Project Rental Assistance Contract** (PRAC) Demonstration program to create new housing for homeless with disabilities by leveraging new set-asides of supportive housing units in federal Low Income Housing Tax Credit (LIHTC) properties and HOME-funded projects.
- Use the not yet capitalized **National Housing Trust Fund** to facilitate development of rental housing for extremely low income households including those that are homeless.
- Ensure that the one time opportunity made available through HUD's new **Neighborhood Stabilization Program** is used, in part, in Milwaukee to redevelop foreclosed properties into affordable housing that can be accessed by people who are homeless.
- As opportunities arise, apply for **HUD's boutique set-asides of Section 8** vouchers for special populations (VASH, Designated Vouchers, Certain Vouchers, and Family Unification Program Vouchers) and use them to house homeless groups that overlap with the targeted subpopulations.

#### 4.11b Quantity of Proposed Units of Service: Assist in the construction of at least 50 new units per year.

#### 4.11c Intended Outcomes:

- Per Year:** Homeless people stabilized in 50 new units per year for ten years.
- Over 10 Years:** Homeless people stabilized in 500 units over ten years

4.11d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2008/09	50			Costs incorporated into the Milwaukee Continuum of Care operations; and collaborating institutions and partners existing resources.	
2010	50				
2011	50				
2012	50				
2013	50				
2014	50				
2015	50				
2016	50				
2017	50				
2018	50	500 units			

#### 4.11e Potential Funding Options Identified/Secured:

- The National Housing Trust Fund
- The Section 811 Program – Reauthorization
- Set-side Section 8 voucher programs for special population
- The Neighborhood Stabilization Program I and II

#### 4.11f Responsible Parties:

- Milwaukee Continuum of Care
- Milwaukee Housing Authority
- Local and non-profit developers of affordable and permanent supportive housing
- City of Milwaukee
- County of Milwaukee

#### 4.11g First Steps Towards Action Implementation:

- Track developments related to new financing resources – create information clearinghouse
- Disseminate financing opportunities via Milwaukee Continuum of Care.



### 4.12 GENERAL STRATEGY: Build *Links with Wisconsin Housing Locator*

#### 4.12a Proposed Action:

Milwaukee will build *Links with the Wisconsin Affordable Housing Locator* (WI Front Door Housing) to coordinate it with the *Milwaukee Campaign to House the Chronically Homeless*. These links will ensure developers and owners of new permanent supportive housing created in Milwaukee a ready supply of eligible applicants to fill all vacant units all of the time. The *Links with the Housing Locator* will also ensure that unit turnover rates in permanent supportive housing are consistently fast and efficient.

This project will begin with a review of the Housing Locator to assess its accessibility for homeless households in Milwaukee and its usefulness for potential developers for the *Milwaukee Campaign* and other 10 Year Plan housing initiatives. A partnership will be established between the Housing Locator and the Continuum of Care. Goals will be set for ensuring that all homeless housing and supportive housing in Milwaukee is listed and regularly updated in the locator and that all homeless shelter and service organizations in Milwaukee are regular and ready users.

**4.12b Quantity of Proposed Units of Service:** Ensure that the WI Front Door Housing Locator will contribute to filling and maintaining full occupancy in 1,260 new units of permanent supportive housing in Milwaukee.

#### 4.12c Intended Outcomes:

- **Per Year:** Homeless people stabilized in 126 new units per year for ten years.
- **Over 10 Years:** Homeless people stabilized in 1,260 units over ten years.

4.12d	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2008/09				\$5,000 planning grant	
2010					
2011					
2012					
2013					
2014					
2015					
2016					
2017					
2018					\$5,000

#### 4.12e Potential Funding Options Identified/Secured:

1. State of Wisconsin – Front Door Housing Locator

#### 4.12f Responsible Parties:

1. 10 Year Plan Implementation Team
2. WI Front Door Housing Locator

#### 4.12g First Steps Towards Action Implementation:

1. Convene planning sessions between 10 Year Plan implementers and WI Front Door Housing.
2. Carry out assessment of locator's strengths and weaknesses relative to the 10 Year Plan.
3. Set goals for extending reach of the locator in Milwaukee within the homeless system.
4. Advertise the housing locator's capacity to help fill units in permanent supportive housing to potential developers who will participate in the Milwaukee Campaign.

**4.13 GENERAL STRATEGY:** Fully involve the philanthropic community in efforts to create more permanent housing for homeless individuals and families.

**4.13a Proposed Action:**

Involve the Milwaukee philanthropic community representatives in all phases of the effort to increase permanent housing for homeless people.

Assist in the development of new PSH units in the Milwaukee Campaign by providing gap funding and other support.

Coordinate intention of the 10-Year Plan with key representatives of the philanthropic community, including private and corporate foundations, to direct private resources to leverage planned projects.

**4.13b Quantity of Proposed Units of Service:** Assist in the construction of 126 new PSH units per year; support the development of policies which will facilitate access to permanent supportive housing for homeless people.

4.13c	New Units of Service Created	Total Units of Service	One Time Capital Costs	Annual Operations and Service Costs	Cumulative Costs
2010	126	126	TBD		TBD
2011	126	252	TBD		TBD
2012	126	378	TBD		TBD
2013	126	504	TBD		TBD
2014	126	630	TBD		TBD
2015	126	756	TBD		TBD
2016	126	882	TBD		TBD
2017	126	1,008	TBD		TBD
2018	126	1,134	TBD		TBD
2019	126	1,260	TBD		TBD

**4.13d Potential Funding Options Identified/Secured:**

1. State of Wisconsin – Front Door Housing Locator

**4.13e Responsible Parties:**

1. Milwaukee area private foundations
2. Milwaukee area corporate foundations

**4.13f Responsible Parties:**

1. Milwaukee Continuum of Care

**4.13g First Steps Towards Action Implementation:**

1. Review the role of philanthropic interests in other counties in the U.S.
2. Work with representatives of the philanthropic community to develop a coordinated approach to its support for permanent housing.



**FOR MORE INFORMATION:**

**Joe Volk, Executive Director  
Community Advocates**

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**NOTICES SENT TO FOR FILE: 091616**

[illegible]



## Legislation Details (With Text)

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**File #:** 091566      **Version:** 0

**Type:** Resolution      **Status:** In Committee

**File created:** 3/24/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Resolution relating to the intent to issue Industrial Development Revenue Bonds for the Alterra Coffee Roasters, Inc. Project.

**Sponsors:** THE CHAIR

**Indexes:** INDUSTRIAL REVENUE BONDS

**Attachments:** Exhibit A, Notice of Intent-Job Estimate Form, Department of City Development Letter, Fiscal Note, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/24/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091566

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Resolution relating to the intent to issue Industrial Development Revenue Bonds for the Alterra Coffee Roasters, Inc. Project.

**Analysis**

This initial resolution sets forth the intent of the City of Milwaukee to approve the issuance of industrial development revenue bonds in an amount not to exceed \$7,800,000 on behalf of Alterra Coffee Roasters, Inc., a Wisconsin corporation, and/or a related entity to be formed (the "Borrower"). The Borrower desires to complete a multi-jurisdictional project located in the City of Milwaukee, Wisconsin (the "City"), the Village of Shorewood, Wisconsin, and the Village of Grafton, Wisconsin. The project consists of financing the (i) acquisition, rehabilitation, equipping and expansion of an approximately 24,000 square-foot facility located at 2301 South Kinnickinnic Avenue, 2314-2320 South Howell Avenue and 2328 South Howell Avenue, all in the City of Milwaukee, Wisconsin, to be used by the Borrower to manufacture bakery and other prepared foods; (ii) rehabilitation and equipping of an existing approximately 7,200 square-foot facility located at 2211 North Prospect Avenue in the City of Milwaukee, Wisconsin, to be used by the Borrower for retail sales of coffee, bakery and other prepared foods; (iii) rehabilitation and equipping of an existing approximately 1,800 square-foot facility located at 4500 Oakland Avenue in the Village of Shorewood, Wisconsin, to be used by the Borrower for the retail sales of coffee, bakery and other prepared foods; (iv) acquisition, rehabilitation and equipping of an existing approximately 9,368 square-foot facility located at 1210-1251 Washington Street in the Village of Grafton, Wisconsin, a portion of which will be used by the Borrower for the retail sales of coffee, bakery and other prepared foods and a portion of which will be leased to other retail tenants; and (v) payment of certain costs related to the issuance of the bonds (collectively, the "Project"). Any of the City, the Village of Shorewood or the Village of Grafton will be the issuer of the bonds. The initial resolution also authorizes a public hearing on the bonds.

**Body**

Whereas, Section 66.1103 of the Wisconsin Statutes (the "Act") authorizes the City of Milwaukee, Wisconsin (the "City"), to authorize the issuance and sale of bonds by the City to construct, equip, re-equip, acquire by gift, lease or purchase, install, reconstruct, rebuild, rehabilitate, improve, supplement, replace, maintain, repair, enlarge, extend or remodel industrial projects in the City; and

Whereas, Section 66.1103(3)(f), Wisconsin Statutes, provides that a municipality also may finance an industrial project, which is located entirely outside the geographic limits of the municipality, but only if the revenue agreement for the project also relates to another project of the same eligible participant, part of which is located within the geographic limits of the municipality; and

Whereas, Alterra Coffee Roasters, Inc., a Wisconsin corporation, and/or a related entity to be formed (the "Borrower"), desires to complete a multi-jurisdictional project consisting of financing the (i) acquisition, rehabilitation, equipping and expansion of an approximately 24,000 square-foot facility located at 2301 South Kinnickinnic Avenue, 2314-2320 South Howell Avenue and 2328 South Howell Avenue, all in the City of Milwaukee, Wisconsin, to be used by the Borrower to manufacture bakery and other prepared foods; (ii) rehabilitation and equipping of an existing approximately 7,200 square-foot facility located at 2211 North Prospect Avenue in the City of Milwaukee, Wisconsin, to be used by

the Borrower for retail sales of coffee, bakery and other prepared foods; (iii) rehabilitation and equipping of an existing approximately 1,800 square-foot facility located at 4500 Oakland Avenue in the Village of Shorewood, Wisconsin, to be used by the Borrower for the retail sales of coffee, bakery and other prepared foods; (iv) acquisition, rehabilitation and equipping of an existing approximately 9,368 square-foot facility located at 1210-1251 Washington Street in the Village of Grafton, Wisconsin, a portion of which will be used by the Borrower for the retail sales of coffee, bakery and other prepared foods and a portion of which will be leased to other retail tenants; and (v) payment of certain costs related to the issuance of the bonds (collectively, the "Project"), all of which would contribute to the well-being of the City, the Village of Shorewood and the Village of Grafton; and

Whereas, The cost of the Project is presently estimated to be greater than \$7,800,000, and the amount proposed to be financed with one or more series of tax-exempt and/or taxable industrial development revenue bonds does not exceed \$7,800,000; and

Whereas, The proposed Project is a multi-jurisdictional project, which is located in the City, the Village of Shorewood and the Village of Grafton, and the Borrower has requested that the City, the Village of Shorewood and the Village of Grafton each approve an initial resolution providing for the financing of the Project in an amount not to exceed \$7,800,000; and

Whereas, It shall be determined at a future date whether the City, the Village of Shorewood or the Village of Grafton shall be the issuer of said industrial development revenue bonds; and

Whereas, The Borrower has requested that the City now approve an initial resolution providing for the financing of the multi-jurisdictional Project; now, therefore, be it

Resolved, By the Common Council of the City of Milwaukee, that:

1. Based upon representations of the Borrower, it is the finding and determination of the Common Council that the Project is a qualified "project" within the meaning of the Act and that the Borrower is an "eligible participant" within the meaning of the Act. The City approves the following:

(a) Financing of the Project in an amount not to exceed \$7,800,000.

(b) Any of the City, the Village of Shorewood or the Village of Grafton shall issue industrial development revenue bonds in one or more series of tax-exempt and/or taxable bonds (the "Bond(s)"), in an amount not to exceed \$7,800,000 to finance the costs of the multi-jurisdictional Project, located in the City, the Village of Shorewood and the Village of Grafton, pursuant to Section 66.1103(3)(f), Wisconsin Statutes.

2. The aforesaid plan of financing contemplates and is conditioned upon the following:

(a) The Bonds shall never constitute an indebtedness of the City within the meaning of any state constitutional provision or statutory limitation.

(b) The Bonds shall not constitute or give rise to a pecuniary liability of the City or a charge against its general credit or taxing powers.

(c) The Project shall be subject to property taxation in the same amount and to the same extent as though the Project were not financed with industrial development revenue bonds.

(d) The Borrower shall find a purchaser for all of the Bonds.

(e) The City's out-of-pocket costs, including but not limited to legal fees, in connection with the authorization, issuance and sale of the Bonds shall be paid by the

Borrower, whether or not the Bonds are issued.

(f) A notice of public hearing (the "TEFRA Hearing") required by federal law for purposes of Section 147(f) of the Internal Revenue Code of 1986, as amended, shall be published in a newspaper or newspapers of general circulation in the City, the Village of Shorewood and the Village of Grafton, and public hearings shall be held by the City, the Village of Shorewood and the Village of Grafton to provide interested individuals or parties the opportunity to testify with respect to the nature and locations of the Project and the issuance of the Bonds to finance the Project.

3. The aforesaid plan of financing shall not be legally binding upon the City nor be finally implemented unless and until:

(a) The details and mechanics of the same are authorized and approved by a further resolution of the Common Council of the City, which shall be solely within the discretion of the Common Council.

(b) The City Clerk shall cause notice of adoption of this Initial Resolution in the form of Exhibit A, a copy of which is attached to this Common Council File, to be published once in a newspaper of general circulation in the City, and the electors of the City shall have been given the opportunity to petition for a referendum on the matter of the aforesaid Bond issue, all as required by law.

(c) Either no such petition shall be timely filed or such petition shall have been filed and said referendum shall have approved the Bond issue.

(d) The City Clerk and the respective Village Clerks shall have received an employment impact estimate issued under Section 560.034 of the Wisconsin Statutes.

(e) All documents required to consummate the financing have been duly authorized and delivered.

(f) The City, the Village of Shorewood, the Village of Grafton and the Borrower have resolved all land use and special use issues with respect to the affected property and the Project.

(g) The City, the Village of Shorewood and the Village of Grafton have each approved the issuance of the Bonds following the public hearings required by Section 2(f) above.

(h) The Borrower shall enter into one or more agreements with the City to use its "best efforts" as defined in such agreement(s) to use certified emerging businesses in construction of the Project.

4. Pursuant to the Act, all requirements that the Project be subject to the contracting requirements contained in Section 66.1103, Wisconsin Statutes, are waived, the Borrower having represented that it is able to negotiate satisfactory arrangements for completing the Project and that the City's interests are not prejudiced thereby.

5. The City Clerk is directed, following adoption of this Initial Resolution (i) to publish notice of such adoption not less than one time in the official newspaper of the City, such notice to be in substantially the same form as Exhibit A, and (ii) to file a copy of this Initial Resolution, together with a statement indicating the date the Notice to Electors was published, with the Secretary of Business Development of the State of Wisconsin within twenty (20) days following the date of publication of such notice.

6. Upon notice from Bond Counsel that the TEFRA Hearing has been properly noticed and held by the City, the Mayor is authorized to execute an Approval of Highest Elected Official for the purposes of Section 147(f) of the Internal Revenue Code of 1986, as amended, with respect to the issuance of the Bonds.



7. As a condition to the issuance of the Bonds, the Borrower shall pay the City a fee of 3/4 of 1 percent of the principal amount of the Bonds and reimburse all costs of the City incurred in connection with the issuance of the Bonds.

8. This Initial Resolution is an "initial resolution" within the meaning of the Act and official action toward issuance of the Bonds for purposes of Sections 103 and 144 of the Internal Revenue Code of 1986, as amended, and the regulations promulgated thereunder. Furthermore, it is the reasonable expectation of the City that proceeds of the Bonds may be used to reimburse expenditures made on the Project prior to the issuance of the Bonds. The maximum principal amount of debt expected to be issued for the Project on the date hereof is \$7,800,000. This statement of official intent is made pursuant to Internal Revenue Code Sections 1.150-2.

**Drafter**

DCD:JS:js

03/24/10/A

**EXHIBIT A**

NOTICE TO ELECTORS OF THE CITY OF MILWAUKEE, WISCONSIN

TAKE NOTICE that the Common Council of the City of Milwaukee, Wisconsin (the "City"), at a regular meeting held at City Hall, 200 East Wells Street, Milwaukee, Wisconsin, on April 13, 2010, adopted an Initial Resolution pursuant to Section 66.1103 of the Wisconsin Statutes, as amended, expressing the intention to issue not to exceed \$7,800,000 of industrial development revenue bonds of the City (the "Bonds") on behalf of Alterra Coffee Roasters, Inc., a Wisconsin corporation, and/or a related entity to be formed (the "Borrower"), to finance a multi-jurisdictional project consisting of the (i) acquisition, rehabilitation, equipping and expansion of an approximately 24,000 square-foot facility located at 2301 South Kinnickinnic Avenue, 2314-2320 South Howell Avenue and 2328 South Howell Avenue, all in the City of Milwaukee, Wisconsin, to be used by the Borrower to manufacture bakery and other prepared foods; (ii) rehabilitation and equipping of an existing approximately 7,200 square-foot facility located at 2211 North Prospect Avenue in the City of Milwaukee, Wisconsin, to be used by the Borrower for retail sales of coffee, bakery and other prepared foods; (iii) rehabilitation and equipping of an existing approximately 1,800 square-foot facility located at 4500 Oakland Avenue in the Village of Shorewood, Wisconsin, to be used by the Borrower for the retail sales of coffee, bakery and other prepared foods; (iv) acquisition, rehabilitation and equipping of an existing approximately 9,368 square-foot facility located at 1210-1251 Washington Street in the Village of Grafton, Wisconsin, a portion of which will be used by the Borrower for the retail sales of coffee, bakery and other prepared foods and a portion of which will be leased to other retail tenants; and (v) payment of certain costs related to the issuance of the bonds (collectively, the "Project"). The Borrower has represented that: (i) the net number of full-time equivalent jobs which will be created at the 2301 South Kinnickinnic Avenue, 2314-2320 South Howell Avenue and 2328 South Howell Avenue, City of Milwaukee project site is 20; (ii) the net number of full-time equivalent jobs which will be maintained at the 2211 North Prospect Avenue, City of Milwaukee project site is 15, and no new full-time equivalent jobs are expected to be created; (iii) the net number of full-time equivalent jobs which will be created at the Village of Shorewood project site is 15; and (iv) the net number of full-time equivalent jobs which will be maintained at the Village of Grafton project site is 15, and no new full-time equivalent jobs are expected to be created.

Pursuant to the terms of Section 66.1103 of the Wisconsin Statutes, all requirements that the Project be subject to the contracting requirements contained in Section 66.1103 are waived, the Borrower having represented that it is able to negotiate satisfactory arrangements for completing the Project and that the City's interests are not prejudiced thereby.

THE BONDS SHALL NEVER CONSTITUTE AN INDEBTEDNESS OF THE CITY, NOR SHALL THE BONDS GIVE RISE TO ANY PECUNIARY LIABILITY OF THE CITY, NOR SHALL THE BONDS BE A CHARGE AGAINST THE GENERAL CREDIT OR TAXING POWERS OF THE CITY. RATHER, THE BONDS SHALL BE PAYABLE SOLELY FROM THE REVENUES AND OTHER AMOUNTS TO BE DERIVED PURSUANT TO THE REVENUE AGREEMENT RELATING TO SAID PROJECT TO BE ENTERED INTO BETWEEN THE CITY AND THE BORROWER.

The Initial Resolution may be inspected in the office of the City Clerk at 200 East Wells Street, Milwaukee, Wisconsin, during business hours.

TAKE FURTHER NOTICE THAT THE ELECTORS OF THE CITY OF MILWAUKEE MAY PETITION FOR A REFERENDUM ON THE QUESTION OF THE BOND ISSUE. Unless within thirty (30) days from the date of the publication of this Notice a petition signed by not less than five percent (5%) of the registered electors of the City of Milwaukee is filed with the City Clerk requesting a referendum on the question of the issuance of the Bonds, the City will issue the Bonds without submitting the proposition for the electors' approval. If such petition is filed as aforesaid, then the Bonds shall not be issued until approved by a majority of the electors of the City of Milwaukee voting thereon at a general or special election.

Ronald D. Leonhardt, City Clerk  
City of Milwaukee, Wisconsin

## Notice of Intent to Obtain a Municipal Industrial Revenue Bond

Section 66.1103 (4m) (a) 1 of the Wisconsin Statutes requires the person or business who intends to obtain an industrial revenue bond issue from a Wisconsin municipality to notify this intention to the Department of Commerce and to any collective bargaining agent in the state with whom the person or business has a collective bargaining agreement. This notification must occur at least 30 days prior to entering into the revenue agreement or signing the loan contract. The person or business must provide information on the number of full-time jobs that are expected to be eliminated, created, or maintained at the project site and elsewhere in Wisconsin as a result of the project which is the subject of this notice. The person or business named below hereby gives notice of intent to obtain an Industrial Revenue Bond pursuant to s. 66.1103 of the Wisconsin Statutes.

### I. Project

A. Person: Lincoln Fowler  
Business: Alterra Coffee Roasters, Inc.  
Address: 2999 North Humboldt Boulevard  
Post Office/ZIP: Milwaukee, WI 53212  
B. Project site: Village of Grafton, WI; City of Milwaukee, WI; and Village of Shorewood, WI  
(Name of city, village or town in which the project is located)

C. Project type: ☒ Expansion at Present Location ☐ Relocation Within Same Municipality

☐ Relocation From Within State ☐ Relocation from Out-of-State ☒ New Business

☐ Branch-Wisconsin Operation ☐ Branch-Out-of-State Operation ☒ Expansion at New Location

D. Maximum amount of IRB financing: \$7,800,000

### II. Employment Estimates (to result within the next 3 years)

Number of Full-Time Jobs		Before Project	To Be Maintained	To Be Created	To Be Eliminated	Net Total Number of Jobs
A. <u>At the Project Site</u>	Grafton	15	15	0	0	15
	Milwaukee	15	15	20	0	35
	Shorewood	0	0	15	0	15
B. <u>At All Other Wisconsin Operations</u>		203	203	0	0	203
C. <u>Net Totals</u>		233	233	35	0	268

D. Will any jobs transfer from one or more locations to the project site? Yes ☐ No ☒

Number of jobs to transfer: N/A

Location(s) the jobs will transfer from: (municipality) N/A

  
Signed/Person completing this form

Lincoln Fowler, Secretary/Treasurer

Title

3/29/10  
Date

414-292-3352

Telephone Number



Department of City Development

City Plan Commission  
Neighborhood Improvement  
Development Corporation  
Redevelopment Authority

Rocky Marcoux  
Commissioner

Martha L. Brown  
Deputy Commissioner



**Milwaukee's Future: IT'S IN OUR HANDS**

[www.milwaukee.gov/2010census](http://www.milwaukee.gov/2010census)

March 29, 2010

To The Honorable  
Community and Economic Development Committee  
Milwaukee, WI 53202

Dear Committee Members:

File No. 091566 sets forth the intent to issue industrial development revenue bonds for four projects being proposed by Alterra Coffee Roasters, Inc. Two projects are in Milwaukee, one project is in Shorewood and the other is in Grafton.

The Milwaukee projects consist of the acquisition, renovation and equipping of a 24,000 square-foot facility at South Kinnickinnic and South Howell Avenues to produce bakery and other prepared foods, and the renovation and equipping of a facility at 2211 North Prospect Avenue as a retail outlet for Alterra.

The bonds are conduit bonds, the interest on which is exempt from federal income taxes and is therefore lower than conventional bank debt. The City does not guarantee payments on the bonds, nor back it with its credit.

Under State Statutes, multi-jurisdictional projects may be financed with one bond issue, issued through one of the municipalities in which one of the projects is located. Shorewood and Grafton are considering similar resolutions to the one before you.

We recommend approval of this file and will be pleased to answer any questions you may have.

Sincerely,

Rocky Marcoux  
Commissioner

## CITY OF MILWAUKEE FISCAL NOTE

A) DATE 03/24/10

FILE NUMBER: \_\_\_\_\_

Original Fiscal Note ☒ Substitute ☐

SUBJECT: Resolution relating to the intent to issue Industrial Development Revenue Bonds for the Alterra Coffee Roasters, Inc. Project.

B) SUBMITTED BY (Name/title/dept./ext.): Rocky Marcoux, Commissioner, DCD

C) CHECK ONE: ☐ ADOPTION OF THIS FILE AUTHORIZES EXPENDITURES  
☐ ADOPTION OF THIS FILE DOES NOT AUTHORIZE EXPENDITURES; FURTHER COMMON COUNCIL ACTION NEEDED. LIST ANTICIPATED COSTS IN SECTION G BELOW.  
☒ NOT APPLICABLE/NO FISCAL IMPACT.

D) CHARGE TO: ☐ DEPARTMENT ACCOUNT(DA) ☐ CONTINGENT FUND (CF)  
☐ CAPITAL PROJECTS FUND (CPF) ☐ SPECIAL PURPOSE ACCOUNTS (SPA)  
☐ PERM. IMPROVEMENT FUNDS (PIF) ☐ GRANT & AID ACCOUNTS (G & AA)  
☐ OTHER (SPECIFY)

E) PURPOSE	SPECIFY TYPE/USE	ACCOUNT	EXPENDITURE	REVENUE	SAVINGS
SALARIES/WAGES:					
SUPPLIES:					
MATERIALS:					
NEW EQUIPMENT:					
EQUIPMENT REPAIR:					
OTHER:					
TOTALS					

F) FOR EXPENDITURES AND REVENUES WHICH WILL OCCUR ON AN **ANNUAL** BASIS OVER SEVERAL YEARS CHECK THE APPROPRIATE BOX BELOW AND THEN LIST EACH ITEM AND DOLLAR AMOUNT **SEPARATELY**.

<input type="checkbox"/> 1-3 YEARS	<input type="checkbox"/> 3-5 YEARS	
<input type="checkbox"/> 1-3 YEARS	<input type="checkbox"/> 3-5 YEARS	
<input type="checkbox"/> 1-3 YEARS	<input type="checkbox"/> 3-5 YEARS	

G) LIST ANY ANTICIPATED FUTURE COSTS THIS PROJECT WILL REQUIRE FOR COMPLETION:


H) COMPUTATIONS USED IN ARRIVING AT FISCAL ESTIMATE:


PLEASE LIST ANY COMMENTS ON REVERSE SIDE AND CHECK HERE ☐

**NOTICES SENT TO FOR FILE : 091566**

[illegible]



## Legislation Details (With Text)

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**File #:** 091588      **Version:** 1

**Type:** Resolution      **Status:** In Committee

**File created:** 3/24/2010      **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:**      **Final action:**

**Effective date:**

**Title:** Substitute resolution authorizing an expenditure of \$25,000 from the Development Fund to relocate electrical service for the 35th Street Viaduct street lighting substation to facilitate the Silver City Townhomes project, in the 8th Aldermanic District.

**Sponsors:** ALD. DONOVAN

**Indexes:** DEVELOPMENT FUND, HOUSING

**Attachments:** Fiscal Note, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
3/24/2010	0	COMMON COUNCIL	ASSIGNED TO		
3/31/2010	1	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		



Number

091588

Version

SUBSTITUTE 1

Reference

080933

Sponsor

ALD. DONOVAN

Title

Substitute resolution authorizing an expenditure of \$25,000 from the Development Fund to relocate electrical service for the 35th Street Viaduct street lighting substation to facilitate the Silver City Townhomes project, in the 8th Aldermanic District.

Analysis

This substitute resolution will permit expenditures from the Development Fund to relocate electrical service that currently crosses a City-owned property and that is impeding the development of the property.

Body

Whereas, By adoption of File No. 080933 on November 25, 2008, the Common Council of the City of Milwaukee approved the sale of a portion of 3507 West Pierce Street ("Property") to Layton Boulevard West Neighbors for the development of affordable housing that is to be known as Silver City Townhomes; and

Whereas, A high-voltage power line that services the 35th Street Viaduct substation for City street lights runs underneath the Property and will impede construction of the project unless the power line is relocated; and

Whereas, Relocating the power line by the buyer would render the Silver City Townhomes project economically infeasible; and

Whereas, Providing \$25,000 from the Development Fund in the 2009 Capital Budget will allow the Department of Public Works to relocate the power line and will enable construction of the Silver City Townhomes to commence this Spring as contemplated by File No. 080933; now, therefore, be it

Resolved, By the Common Council of the City of Milwaukee, that the City Comptroller is directed to transfer \$25,000 from the Development Fund Project Account No. 9990-UR03309000A to Account No. 1910-UR03398800; and, be it

Further Resolved, That the City Comptroller, in conjunction with the Commissioner of the Department of City Development, is directed to establish the subaccount and to follow the City guidelines necessary to maintain the fiscal control to carry out the intent and purpose of this resolution; and, be it

Further Resolved, That the Commissioner of the Department of Public Works is directed to enter into any contracts, agreements and instruments necessary to relocate the power line for the 35th Street Viaduct street lighting substation.

Drafter

DCD:YSL:bmm

03/25/10

## CITY OF MILWAUKEE FISCAL NOTE

A) DATE March 25, 2010FILE NUMBER: 091588Original Fiscal Note ☒ Substitute ☐SUBJECT: Substitute resolution authorizing an expenditure of \$25,000 from the Development Fund to relocate electrical service for the 35th Street Viaduct street lighting substation to facilitate the Silver City Townhomes project, in the 8th Aldermanic District.B) SUBMITTED BY (Name/title/dept./ext.): Rocky Marcoux, Commissioner

C) CHECK ONE: ☒ ADOPTION OF THIS FILE AUTHORIZES EXPENDITURES  
☐ ADOPTION OF THIS FILE DOES NOT AUTHORIZE EXPENDITURES; FURTHER COMMON COUNCIL ACTION NEEDED. LIST ANTICIPATED COSTS IN SECTION G BELOW.  
☐ NOT APPLICABLE/NO FISCAL IMPACT.

D) CHARGE TO: ☐ DEPARTMENT ACCOUNT(DA) ☐ CONTINGENT FUND (CF)  
☒ CAPITAL PROJECTS FUND (CPF) ☐ SPECIAL PURPOSE ACCOUNTS (SPA)  
☐ PERM. IMPROVEMENT FUNDS (PIF) ☐ GRANT & AID ACCOUNTS (G & AA)  
☐ OTHER (SPECIFY)

E) PURPOSE	SPECIFY TYPE/USE	ACCOUNT	EXPENDITURE	REVENUE	SAVINGS
SALARIES/WAGES:					
SUPPLIES:					
MATERIALS:					
NEW EQUIPMENT:					
EQUIPMENT REPAIR:					
OTHER:	Power line relocation	1910- UR03398800	\$25,000		
TOTALS			\$25,000		

F) FOR EXPENDITURES AND REVENUES WHICH WILL OCCUR ON AN **ANNUAL** BASIS OVER SEVERAL YEARS CHECK THE APPROPRIATE BOX BELOW AND THEN LIST EACH ITEM AND DOLLAR AMOUNT **SEPARATELY**.

<input type="checkbox"/> 1-3 YEARS	<input type="checkbox"/> 3-5 YEARS	
<input type="checkbox"/> 1-3 YEARS	<input type="checkbox"/> 3-5 YEARS	
<input type="checkbox"/> 1-3 YEARS	<input type="checkbox"/> 3-5 YEARS	

G) LIST ANY ANTICIPATED FUTURE COSTS THIS PROJECT WILL REQUIRE FOR COMPLETION:

H) COMPUTATIONS USED IN ARRIVING AT FISCAL ESTIMATE:

PLEASE LIST ANY COMMENTS ON REVERSE SIDE AND CHECK HERE ☐

**NOTICES SENT TO FOR FILE : 091588**

[illegible]



## Legislation Details (With Text)

**File #:** 091215 **Version:** 0

**Type:** Communication-Report **Status:** In Committee

**File created:** 12/22/2009 **In control:** COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE

**On agenda:** **Final action:**

**Effective date:**

**Title:** Communication from the Community Development Grants Administration relative to the Final Year 2009 Consolidated Annual Performance and Evaluation Report.

**Sponsors:** THE CHAIR

**Indexes:** COMMUNITY BLOCK GRANT ADMINISTRATION, COMMUNITY DEVELOPMENT BLOCK GRANT, REPORTS AND STUDIES

**Attachments:** Neighborhood Strategic Planning Coordinating Agencies, Homebuyer Counseling & Other Homebuyer Assistance Activities, Home Purchases from 2004 to 2008 Assisted by the United Community Center, Report from Housing Resources, Inc, Report from Select Milwaukee, Inc, Special Economic Development-Business Assistance, Report from Career Youth Development, Inc, Report from Wisconsin Women's Business Initiative, Report from Avenues West Association, Report from the SOHI District, Report from Lincoln Neighborhood Redevelopment Corporation, Hearing Notice List

Date	Ver.	Action By	Action	Result	Tally
12/22/2009	0	COMMON COUNCIL	ASSIGNED TO		
1/5/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
1/11/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HELD TO CALL OF THE CHAIR	Pass	3:0
1/28/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
2/1/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HELD TO CALL OF THE CHAIR	Pass	5:0
2/1/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HELD TO CALL OF THE CHAIR	Pass	5:0
2/1/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	RECONSIDERED	Pass	5:0
2/19/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
2/22/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HELD TO CALL OF THE CHAIR	Pass	5:0
3/8/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		
3/11/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HELD TO CALL OF THE CHAIR	Pass	4:0
3/31/2010	0	COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE	HEARING NOTICES SENT		

**Number**

091215

**Version**

ORIGINAL

**Reference**

**Sponsor**

THE CHAIR

**Title**

Communication from the Community Development Grants Administration relative to the Final Year 2009 Consolidated Annual Performance and Evaluation Report.

**Requestor**

**Drafter**

CC

TB

1/4/10

# 2010 Coordinating Agencies

NSP Area	Area Name	Organization	Contact	Address	ZipCode	phone	Fax
1	Parklawn	YMCA-Parklawn	Julie Borum	4340 N. 46 <sup>th</sup> Street	53216	873-9622	224-0151
2	Northwest Side	Havenwoods ED Corporation	Stephanie Harling	6161 N. 64 <sup>th</sup> Street	53218	431-2274	463-4858
3	Lincoln Park	Lincoln Park Community Center, Inc.	Ruth Varnado	1301 W. Hampton Ave.	53206	963-6400	963-6407
4	United Community	Northwest Side CDC	Gracelyn Wilson	4265 N. 30 <sup>th</sup> Street	53216	447-8230	447-8201
5	Sherman Park	Sherman Park Community Association	Fred Curzan	3526 W. Fond Du Lac Ave.	53216	444-9803	444-9813
6	Harambee	Harambee Ombudsman Project, Inc.	Sherman Hill	2772 N. Dr. MLK Drive	53212	264-7822	264-0846
7	Riverwest/Lower East Side	YMCA-CDC	Rafael Garcia	1350 W. North Ave. # 130	53205	374-9441	374-9446
8	Metcalfe Park	North Ave. CDC	Renee Booker	3341 W. North Ave.	53210	871-4569	873-9998
9	Amani	Project Respect	Barbara Moore	2730 N. 27 <sup>th</sup> Street	53210	444-5040	444-5065
10	WAICO/YMCA	YMCA -CDC	Rafael Garcia	1350 W. North Ave. # 130	53205	374-9441	374-9446
11	Grandview/Walnut Heights	Lisbon Avenue Neighborhood Development	Toni Anderson	3701 W. Lisbon Ave.	53208	934-8540	934-8596
12	Mid-Town	Safe and Sound	Joe Kubisak	801 W. Michigan St.	53233	221-6702	224-7548
13	Hillside/Lapham	Boys & Girls Club of Greater Milwaukee	Duane Wilson	623 W. Cherry St.	53212	291-0347	291-9905
14	West Side	Merrill Park Neighborhood Association	Bob Greene	3326 W Michigan Ave.	53208	933-7577	933-7597
15	Greater Clark Square	South Side Organizing Committee Inc.	Steve Fendt	1300 South Layton Blvd.	53215	672-8090	672-8358
16	Near South Side	Hope House	Ken Schmidt	209 W. Orchard St.	53204	645-2112	645-2249
17	Historic South Side	South Side Organizing Committee Inc	Steve Fendt	1300 South Layton Blvd.	53215	672-8090	672-8358
18	Historic Grandville Station	YMCA -CDC	Rafael Garcia	1350 W. North Ave. # 130	53224	374-9441	374-9446

# 2010 CDGA Project Activity Report

Organization: \_\_\_\_\_  
 Report #: \_\_\_\_\_  
 Account: \_\_\_\_\_

Prepared By: \_\_\_\_\_ Date: \_\_\_\_\_  
 Accepted By: \_\_\_\_\_ Date: \_\_\_\_\_

Community Organizing/Crime Awareness Prevention/Neighborhood Strategic Planning - NSP Area: 9

051-Crime Prevention-LMA - HUD Objective: Create suitable living environment; HUD Outcome: Sustainability

Census Tracts - 62,68,89,90,98,99

Principal Project Activity(s)	Measurement		Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Total
Door-to-Door Contacts	# of contacts	Plan													0
		Actual													0
In Coordination with MPD, Establish & Maintain Block Clubs/Neigh. Watches/Land Lord Compacts/Neigh. Stakeholder Groups	# clubs registered w/ MPD	Actual													0
	# of LL compacts	Actual													0
	# of meetings attended	Actual													0
	# of attendees	Actual													0
Organize Residents in Coordinated Neighborhood Clean-ups (as identified & coordinated w/ DNS)	# of clean-ups	Plan													0
		Actual													0
	# of residents	Actual													0
Coordinate Issue Based Community Planning Mtgs. & Community Events (Census ED & Outreach)	# of mtgs	Actual													0
	# of events	Actual													0
	# of residents	Actual													0
	# of residents	Actual													0
Other Initiatives	# of residents involved (unduplicated)	Actual													0
Total Number of Residents Involved	# of residents involved (unduplicated)	Plan													0
		Actual													0

A ROSTER THAT MATCHES THE TOTAL NUMBER OF RESIDENTS INVOLVED (UNDUPLICATED) MUST BE SUBMITTED WITH EVERY ACTIVITY REPORT

# YEAR 2010 CDGA ACTIVITY WORKPLAN

Project Name: \_\_\_\_\_

Prepared By: \_\_\_\_\_ Date: \_\_\_\_\_

Project Number: \_\_\_\_\_

Approved By: \_\_\_\_\_ Date: \_\_\_\_\_

NRSA Area: \_\_\_\_\_

Page 1 of 3

ACTIVITY	TIMETABLE	METHOD	EXPECTED OUTCOMES		OUTCOME MEASUREMENT (may be more than one per activity)	DATA SOURCE
			MID-TERM OUTCOMES	LONG-TERM OUTCOMES (highlight one or more)		
Door-to-Door Contacts				<ol style="list-style-type: none"> <li>1. Reduce Crime</li> <li>2. Increase Property Values</li> <li>3. Increase Economic Vitality</li> <li>4. Improve Neighborhood Quality of Life</li> </ol>		
In Coordination with MPD – Establish & Maintain Block Clubs				<ol style="list-style-type: none"> <li>1. Reduce Crime</li> <li>2. Increase Property Values</li> <li>3. Increase Economic Vitality</li> <li>4. Improve Neighborhood Quality of Life</li> </ol>		



# YEAR 2010 CDGA ACTIVITY WORKPLAN

Project Name: \_\_\_\_\_

Prepared By: \_\_\_\_\_ Date: \_\_\_\_\_

Project Number: \_\_\_\_\_

Approved By: \_\_\_\_\_ Date: \_\_\_\_\_

NRSA Area: \_\_\_\_\_

Page 2 of 3

ACTIVITY	TIMETABLE	METHOD	EXPECTED OUTCOMES		OUTCOME MEASUREMENT (may be more than one per activity)	DATA SOURCE
			MID-TERM OUTCOMES	LONG-TERM OUTCOMES (highlight one or more)		
Organize Residents in Coordinated Neighborhood Clean-ups (through DNS)				<ol style="list-style-type: none"> <li>1. Reduce Crime</li> <li>2. Increase Property Values</li> <li>3. Increase Economic Vitality</li> <li>4. Improve Neighborhood Quality of Life</li> </ol>		
Coordinate Community Planning Mtgs. & Community Events				<ol style="list-style-type: none"> <li>1. Reduce Crime</li> <li>2. Increase Property Values</li> <li>3. Increase Economic Vitality</li> <li>4. Improve Neighborhood Quality of Life</li> </ol>		

# YEAR 2010 CDGA ACTIVITY WORKPLAN

Project Name: \_\_\_\_\_ Prepared By: \_\_\_\_\_ Date: \_\_\_\_\_

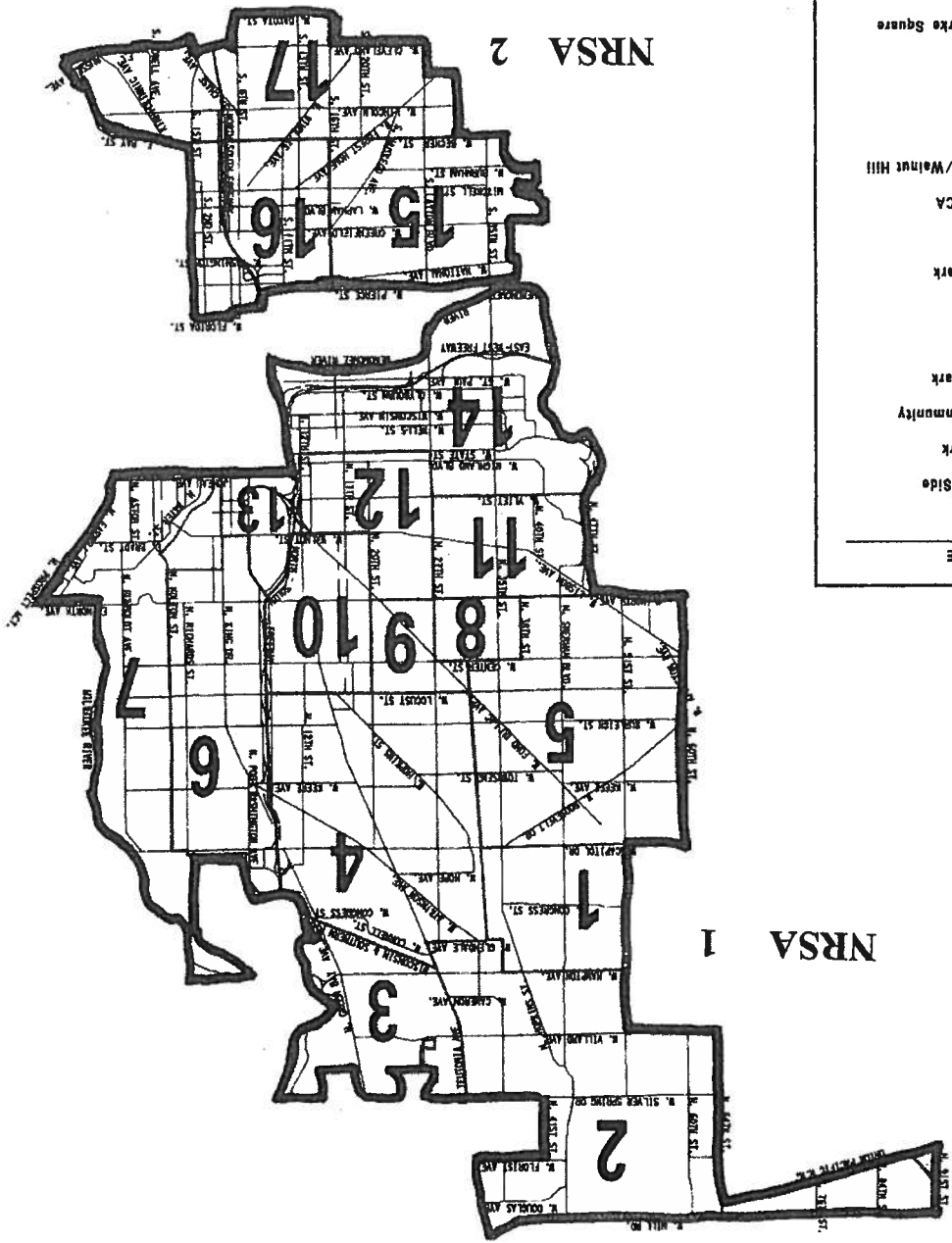
Project Number: \_\_\_\_\_ Approved By: \_\_\_\_\_ Date: \_\_\_\_\_

NRSA Area: \_\_\_\_\_

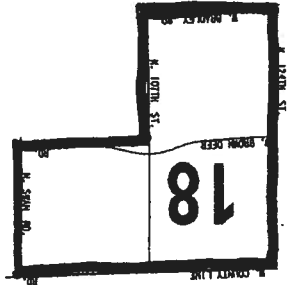
Page 3 of 3

ACTIVITY	TIMETABLE	METHOD	EXPECTED OUTCOMES		OUTCOME MEASUREMENT (may be more than one per activity)	DATA SOURCE
			MID-TERM OUTCOMES	LONG-TERM OUTCOMES (highlight one or more)		
Coordinate Issue Based Community Planning Mtgs. & Community Events (census outreach and education)				<ol style="list-style-type: none"> <li>1. Reduce Crime</li> <li>2. Increase Property Values</li> <li>3. Increase Economic Vitality</li> <li>4. Improve Neighborhood Quality of Life</li> </ol>		

# **CITY OF MILWAUKEE NEIGHBORHOOD REVITALIZATION STRATEGY AREAS (NRSA)**



AREA	AREA NAME
1	Parklawn
2	Northwest Side
3	Lincoln Park
4	United Community
5	Sherman Park
6	Horombee
7	Riverwest
8	Metcalf Park
9	Midtown
10	WAICDI YMCA
11	Grandview / Walnut Hill
12	Mid-Town
13	Hillside
14	Westside
15	Greaser Clarke Square
16	Near South Side
17	Historic South Side
18	Historic Granville Station



### **Homebuyer Counseling & Other Homebuyer Assistance Activities**

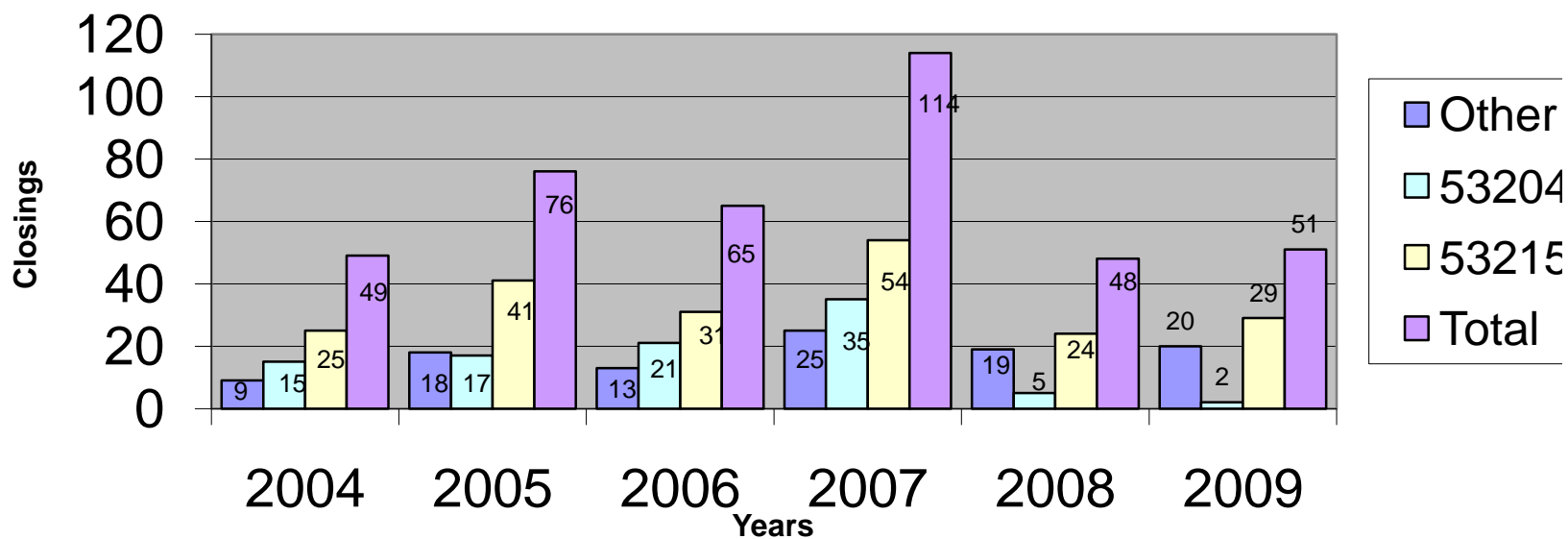
A total of **\$300,000** was allocated for homebuyer counseling and other homebuyer assistance activities which resulted in **211** mortgage loan closings for *first-time* low income homebuyers. Besides pre-purchase counseling and mortgage loan assistance, funded agencies provided budget counseling and assistance with credit repair.

The counseling agencies met regularly to maintain a collaborative working relationship with one another. They addressed issues related to affordable home ownership resulting in the following system improvements to better serve prospective clients: utilization of a standardized data base, standardized employee qualifications and job descriptions, on-going training for home buyer counselors and the establishment of community outstations to improve access to homebuyer assistance services. Homebuyer counseling services have expanded to include assistance to residents in obtaining home improvement/repair loans, refinancing of existing mortgage loans, post purchase, tax default and mortgage default counseling.

These efforts all play a major role in affirmatively furthering fair housing and have helped result in the following accomplishments:

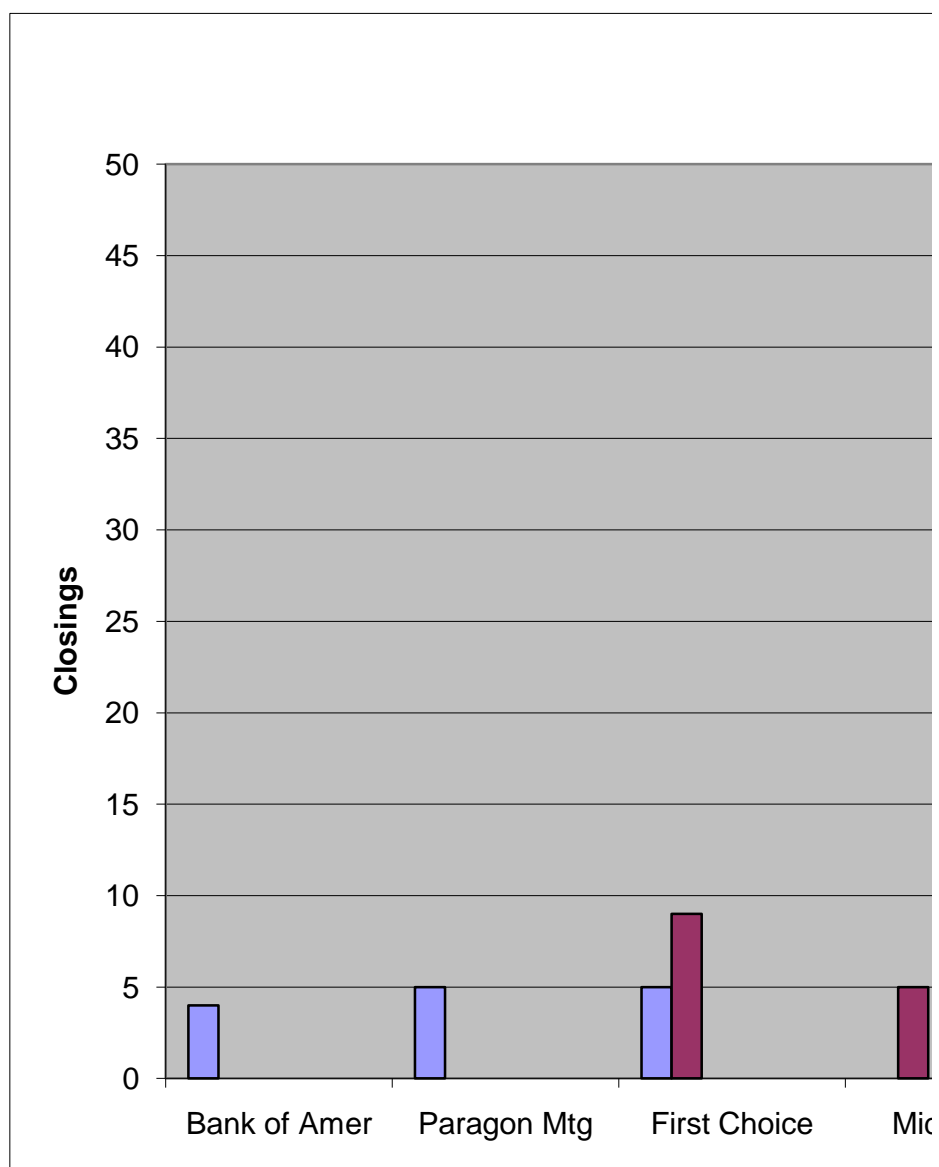
- ❖ Increased owner occupancy in areas previously neglected and ignored by lenders;
- ❖ Promotion of neighborhood stability and pride; increased City tax base;
- ❖ Promotion of the Central City as a desirable place to live and work;
- ❖ Education and training programs for lenders to help eliminate stereotypes that create barriers for prospective homeowners;
- ❖ Improved communication between community agencies and lenders;
- ❖ Increased access to mortgage and other lending by persons previously denied, namely persons of color.

# Home Purchases

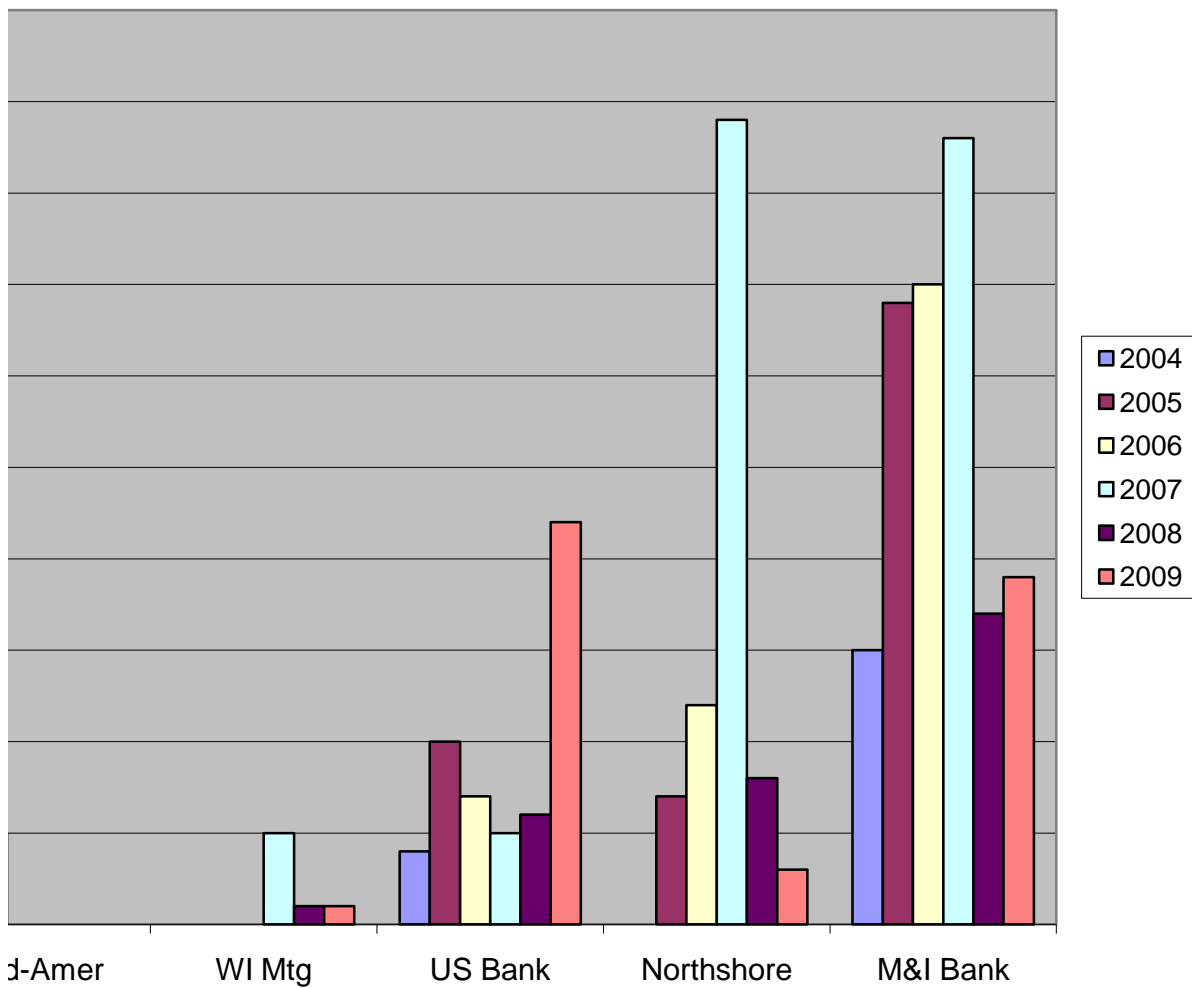


95% of Closings are ITIN's clients (non-documented)  
5% of Closings are documented clients

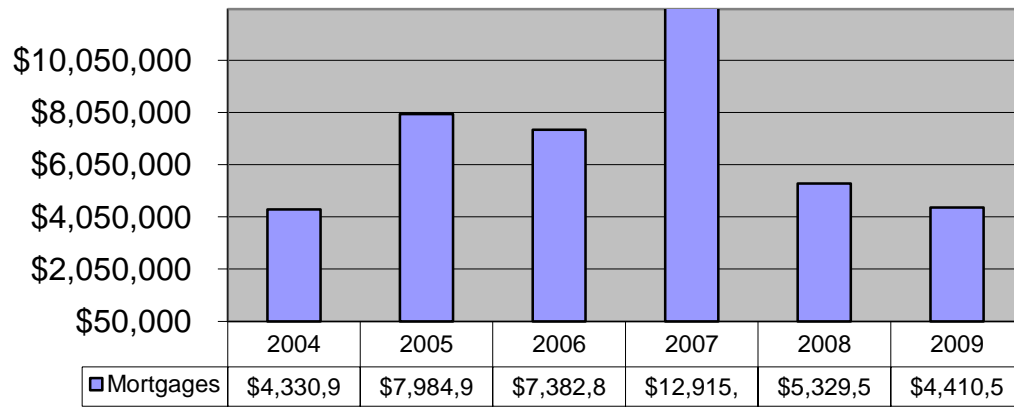
	2004	2005	2006	2007	2008	2009
Bank of Amer	4	0	0	0	0	0
Paragon Mtg	5	0	0	0	0	0
First Choice	5	9	0	0	0	0
Mid-Amer	0	5	0	0	0	0
WI Mtg	0	0	0	5	1	1
US Bank	4	10	7	5	6	22
Northshore	0	7	12	44	8	3
M&I Bank	15	34	35	43	17	19



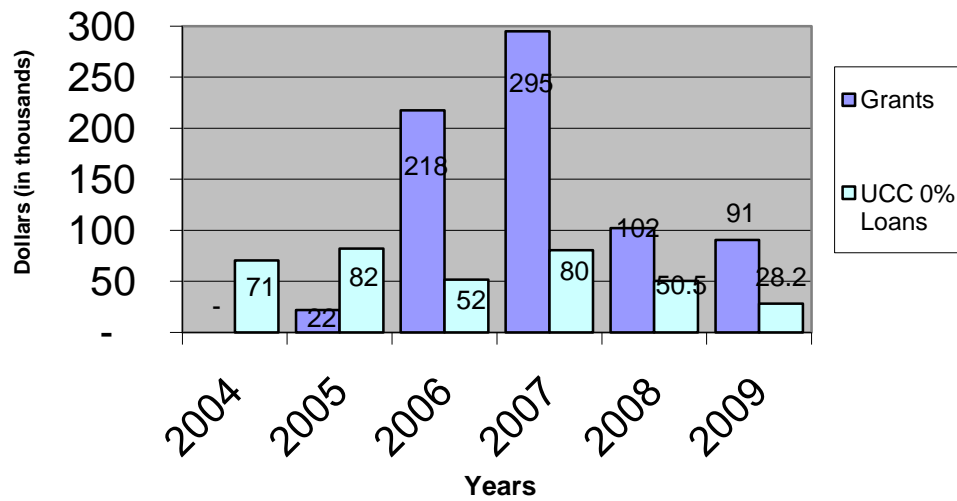
## Lenders



## Investment Value



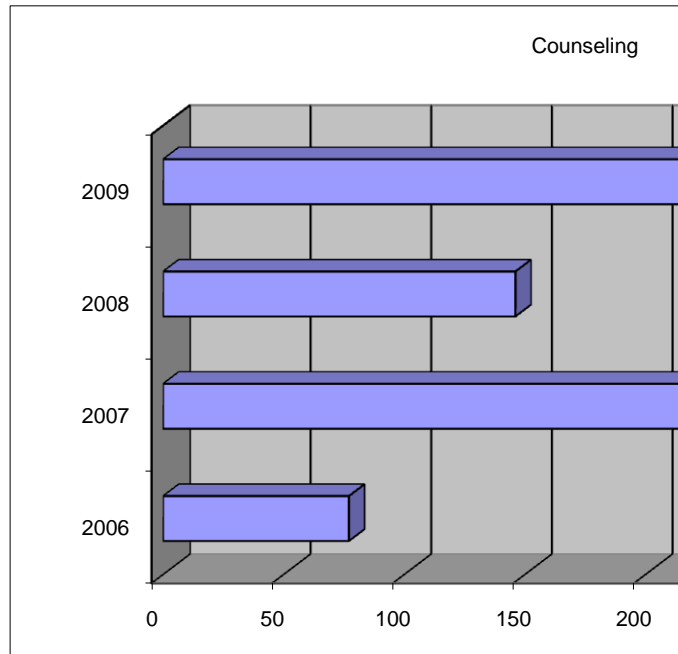
## Grants & Loans Awarded





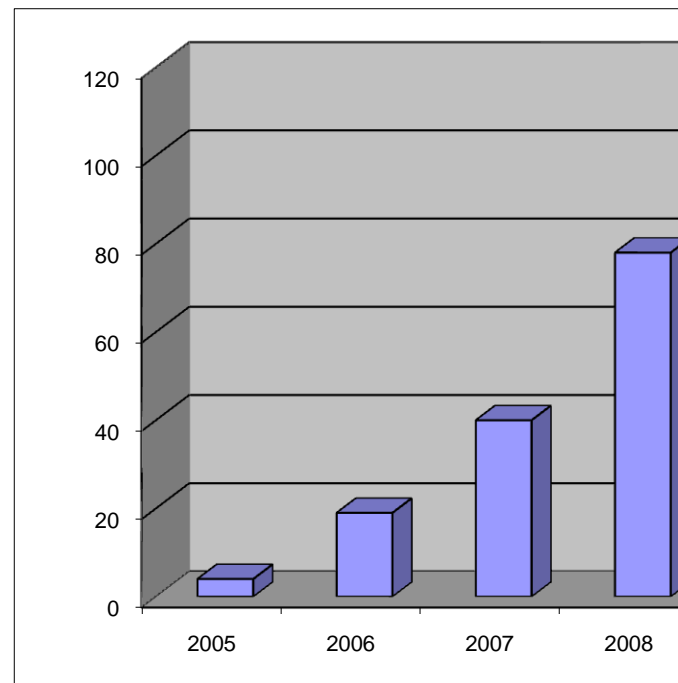
### Counseling

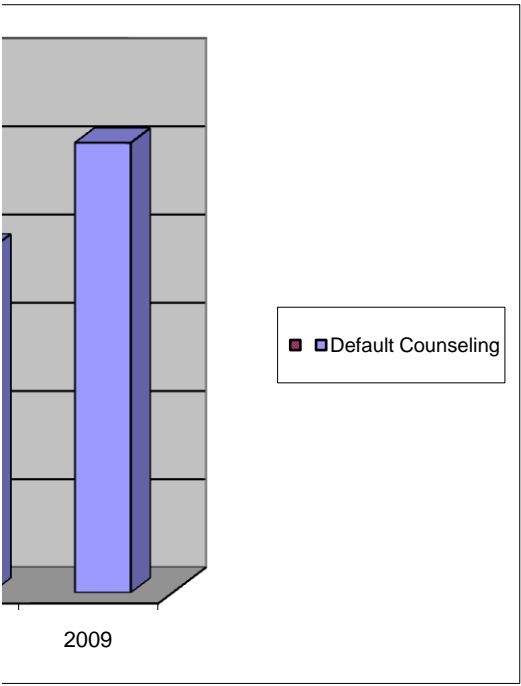
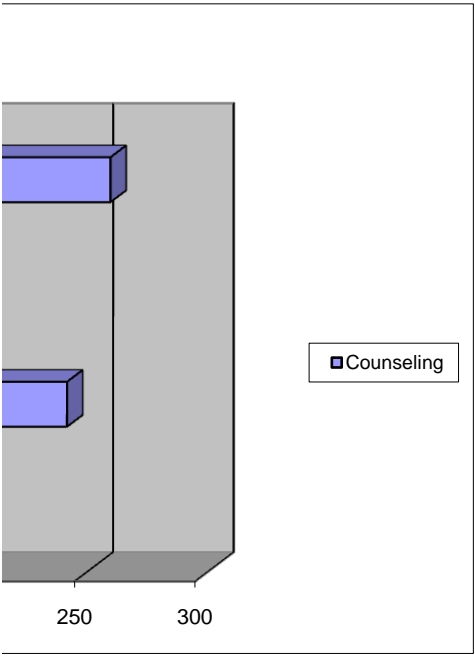
2006	77
2007	242
2008	146
2009	260
Total	725



### Default Counseling

2005	4
2006	19
2007	40
2008	78
2009	102
Total	243







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**Homeownership Center**

7830 West Burleigh Street, Milwaukee, WI 53222  
(414) 461-6330 Ph (414) 461-6320 Fax

February 22, 2010

**Alderman Joe Davis, Sr., Chair**  
Community and Economic Development Committee  
City Hall, Room 205  
200 E. Wells Street  
Milwaukee, WI 53202

Dear Alderman Davis:

It was a pleasure to address the Community Economic Development Committee at today's meeting. I am appreciative of the time allowed to provide information on Housing Resources, Inc.'s 2009 Homebuyer/Homeownership programming and outcomes. Housing Resources, Inc. was founded in 1991 and has been HUD approved since 1998. HRI is a NeighborWorks® America chartered affiliate member. Our comprehensive services help buyers understand the purchase process, how to use credit responsibly, save and budget for homeownership, and provides them the critical skills they need to manage home equity. As you requested, following are the statistics mentioned in our presentation today:

<b>2009 CDBG</b>	<b>Goals</b>	<b>Actual</b>
Loans Closed	79	86
Education Seminars	24	23
Credit Counseled	156	175
New Clients Counseled	300	313

Total Homebuyer Education Seminar graduates: 652  
Clients who received one-on-one counseling: 511

Families who purchased homes in the City of Milwaukee: 141  
Total investment into Milwaukee neighborhoods: \$13,372,461  
(investment of over \$12 million in loans, over \$732,000 in grant assistance and nearly \$513,000 in homebuyer's investment)

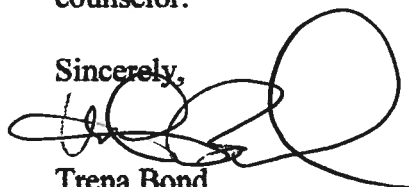
Included in our closed loans were 40 REOs that were purchased for loans totaling over \$2.7 million dollars, homebuyers' investment of over \$121,000 and grant assistance provided to these buyers in the amount of nearly \$307,000 (including NSP funds). This brought \$3,173,994 investment back into the neighborhoods by these REOs (purchased by owner-occupants) being put back into the tax base.

Other efforts leveraged from the CDBG homebuyer education allocation to HRI include the Healthy Neighborhood Tour of Homes (now an annual event). Partners in this collaborative effort include the Greater Milwaukee Foundation and lead agency/community based organizations for each of Milwaukee's 9 Healthy Neighborhoods. In 2009, 425 buyers participated in the Tour of Homes that occurred in Milwaukee's designated Healthy Neighborhoods. Of the 53 homes toured, 13 were sold to owner-occupants; 17 REOs were purchased by owner-occupants; and 18 on-the-market homes were sold to owner-occupants. Eight-eight percent of Tour of Homes participants felt that the Healthy Neighborhoods they toured would be an excellent choice for home buyers and that the neighborhood was "nicer" than they thought it would be compared to pre-tour perception ratings of only 36% thinking the neighborhood would be an excellent choice for homebuyers.

HRI also worked one-on-one with 370 homeowners who needed assistance to avoid foreclosure. Ninety-nine percent of families that HRI assisted had not received homebuyer education prior to purchasing their home. Others facing foreclosure who did receive homebuyer education prior to the purchase of their homes were in foreclosure due to loss of a job or other income.

HRI's client base is: 88% LMI; 63% African-American; 23% Hispanic; 1% Asian; and 1% Native American. We continue to expand our market by conducting community outreach. This year we have expanded our reach to include the Asian home purchase market by hiring a counselor.

Sincerely,

A handwritten signature in black ink, appearing to read 'Trena Bond', with a large, stylized loop at the end.

Trena Bond  
Executive Director

c: Alderman Willie Wade



March 8, 2010

To: Alderman Joe Davis, Sr., Chairperson, & Members of the Community and Economic Development Committee

From: Ray Schmidt, Executive Director

Re: Follow-up to February 22, 2010 Community and Economic Development Committee Meeting

Thank you for the recent opportunity to appear before the Committee to update members on the homeownership counseling work of Select Milwaukee. I am pleased to follow-up with the services results presented at the meeting to supplement the information we provide monthly to the Community Development Grants Administration.

Permit me to reiterate some of the points made by the housing counseling groups at the February 22<sup>nd</sup> meeting:

- It's a buyer's market – it is an excellent time to pursue homeownership – interest rates are reasonable, many affordable homes on the market and a variety of financial assistance, including Neighborhood Stabilization Program resources, is available
- All buyers are strongly advised to secure the services of a CDBG-funded home buyer counseling organizations; in fact, much of the subsidy, including NSP, requires that home buyers secure 8 hours of home buyer counseling services
- Quality mortgage financing is available, just a little more complicated to access – contrary to public perception; helping first-time buyers secure this financing is an invaluable service of the counseling organizations
- Counseling groups collectively are at maximum capacity with the tax credit, NSP and the season boosting traffic and foreclosure counseling efforts – additional support for our work would be a sound investment

Sales, mortgage investment and customer profile information for 2008 and 2009:

	<b>Select Milwaukee 2009</b>	<b>Select Milwaukee 2008</b>
<b>Loan closings (#)</b>	167	136
<b>Sales volume (\$)</b>	19.3 million	16.9 million
<b>Mortgage origination (\$)</b>	17.8 million	15.7 million
<b>Median sale price (\$)</b>	\$110,000	\$112,000
<b>Median mortgage amount (\$)</b>	\$104,000	\$101,421
<b>Customer subsidy (\$)</b>	867,304	682,686
<b>Pre-approvals carried over #)</b>	39	31
<b>Pre-approvals (\$)</b>	3,7305,087	3,181,143
<b>Customer Profile</b>		
<b>Median household income</b>	\$40,621	\$40,700
<b>% Milwaukee Median Income</b>	73%	70%
<b>% Households headed by woman</b>	25%	39%
<b>% customers African-American</b>	42%	49%
<b>% customers Latino, other</b>	<b>11%</b>	11%

Customer subsidy noted above includes:

- \$95,000 City ADDI/HAP
- \$186,000 City NSP
- \$88,000 Wisconsin Housing Cost Reduction Initiative (HCRI)
- \$186,000 Federal Home Loan Bank of Chicago Affordable Housing Program (AHP)
- \$158,000 Employer-provided EAH benefits
- \$40,000 Individual Development Accounts (IDA)
- \$66,000 Select Milwaukee Purchase Assistance Loan (PAL)
- \$49,000 others

Additional homebuyer services in 2009 included:

- Homebuyer counseling and information provided 893 households
- 324 individuals attended 18 homebuying workshops
- 396 individuals attended 22 Select Milwaukee program orientations

Select Milwaukee's Employer Assisted Homeownership Program initiative with 10 employers including Aurora Health Care, Northwestern Mutual, Harley-Davidson, United Way, Visa Lighting, UWM, Milwaukee Center for Independence and Boys & Girls Clubs, in 2009:

- Created 86 new homeowners
- Generated \$158,000 employer-provided downpayment & closing cost assistance
- Secured \$10.2 million total mortgage investment

The value-added by home buyer counseling supported by the City is reflected in the significantly higher success rates of Select Milwaukee's counseled homebuyers. According to NeighborWorks® America, the 2.4% foreclosure rate of 529 Select Milwaukee purchasers 2005 – 2007 is significantly lower than Milwaukee County purchasers for the same period:

- 19% foreclosure rate for subprime borrowers
- 5% for all Milwaukee County borrowers
- 3% for prime-priced conventional borrowers

Each dollar of Select Milwaukee programs expenditure creates \$24 investment. The City's CDGA \$60,000 annual investment in Select Milwaukee's home buyer counseling program is an important resource – consistently demonstrating impressive leverage of private investment in owner-occupied homeownership. In 2009:

- \$21.3 Million in private investment – that's \$365 for each CDBG dollar
- \$867 Thousand in purchase & rehab subsidy – \$14 for each CDBG dollar

Select Milwaukee launched homeownership preservation counseling services in 2009 with the support of the National Foreclosure Mitigation Counseling program, administered NeighborWorks® America. We've had the opportunity to work closely with the Milwaukee Foreclosure Mediation Program and have helped the program achieve impressive results. We were able to assist twenty-one of 30 homeowners referred to us by the Program secure loan modifications. An additional 379 homeowners have received counseling and advice regarding the preservation of their status as homeowner.

As a chartered member of NeighborWorks® America, Select Milwaukee has enjoyed a wide-range of support that has translated into expanded capacity and expertise to serve Milwaukee families and help strengthen Milwaukee neighborhoods. NeighborWorks® has provided Select Milwaukee significant unrestricted operating and capital lending resources, extensive staff and board training opportunities in Wisconsin and at National NeighborWorks® Training institutes and technical assistance on a variety of topics to strengthen our capacity and performance.

Attached is information about our weekly Orientation Programs and Foreclosure Workshops – this is valuable information for your constituents. Please feel free to distribute.

Thank you again for your support and for your interest in our work. Please do not hesitate to contact me at [rschmidt@selectmilwaukee.org](mailto:rschmidt@selectmilwaukee.org) or 414-299-3608 if you have any questions or need additional information.



## **WELCOME TO SELECT MILWAUKEE!**

If you are thinking about purchasing a home in Milwaukee, join us to learn about the many ways Select Milwaukee can help you navigate your home purchase, including:

- Our comprehensive homeownership services
- Downpayment & closing costs incentives
- What documentation you'll need
- How to get started towards your purchase

### **FREE Monthly Orientation Schedule**

**1<sup>st</sup> and 3<sup>rd</sup> TUESDAY – NOON**

**2<sup>nd</sup> and 4<sup>th</sup> TUESDAY – 5:30pm**  
*(no Orientation on 5<sup>th</sup> Tuesday)*

*Location*

**SELECT MILWAUKEE**

**2209 N. DR. MARTIN LUTHER KING, JR. DRIVE**

**(On the corner of King and Garfield, front entrance with a buzzer in upper left corner)**

**SEATING IS LIMITED - ORIENTATIONS START PROMPTLY**

***PLEASE ARRIVE EARLY OR ON TIME!!!***

FOR MORE INFORMATION, PLEASE VISIT US @ [WWW.SELECTMILWAUKEE.ORG](http://WWW.SELECTMILWAUKEE.ORG) OR CALL (414) 562-5070

Select Milwaukee, Inc. is a HUD-certified counseling agency. For over 15 years, Select Milwaukee has been a trusted nonprofit homeownership advocacy organization dedicated to assisting individuals and families purchase homes they can afford to stay in.



# ARE YOU AFRAID OF LOSING YOUR HOME?



## WHEN:

**1<sup>st</sup> & 3<sup>rd</sup>**  
**Tuesday of**  
**each month**

## TIME:

**6:00pm – 8:00pm**  
**Sign in at 5:45pm**

Workshop starts  
promptly at 6:00pm

## LOCATION:

**SELECT**  
**MILWAUKEE**

**2209 N. Dr. MLK, Jr. Dr.**  
**2<sup>nd</sup> Floor**

**PRE-REGISTRATION IS**  
**REQUIRED**



## HAVING TROUBLE PAYING YOUR MORTGAGE?

**YOU ARE NOT ALONE. GET THE HELP YOU NEED!**

**ATTEND ONE OF OUR *FREE* WORKSHOPS TO LEARN HOW**  
**OUR HOMEOWNERSHIP PRESERVATION SPECIALISTS,**  
**IRIS GONZALEZ & BRENDA BROWN CAN HELP YOU!**

**SEATING IS LIMITED!!**

**CALL US AT (414) 562-5070 TO PRE-REGISTER**

***\*OFFERED IN ENGLISH & SPANISH***

***\*NO CHILD CARE AVAILABLE***

Select Milwaukee, Inc. is a HUD-certified counseling agency.  
For over 15 years, Select Milwaukee has been a trusted nonprofit housing counseling agency  
dedicated to assisting homeowners.

## **COMMUNITY DEVELOPMENT GRANTS ADMINISTRATION**

### **CATEGORY: SPECIAL ECONOMIC DEVELOPMENT/BUSINESS ASSISTANCE**

**Special Economic Development/Business Assistance** – Community-based agencies provide technical assistance to businesses to help spur new job creation and job retention. Assistance includes: business plan development, financial accounting, loan underwriting, legal and tax consulting and contract procurement.

**2009 TOTAL ALLOCATION: \$650,000; (\$50,000 Reprogramming)**

**2009 Outcomes: Total number of jobs created: 63 full-time; 28 part-time**

#### **2009 FUNDED GROUPS:**

African American Chamber of Commerce	Lincoln Village Business Association
Avenues West Association	Martin Luther King Economic Development Corp.
Burleigh Street CDC	Milwaukee Urban Entrepreneur Partnership
Hispanic Chamber of Commerce	North Avenue Community Development Corp.
Hmong Wisconsin Chamber of Commerce	Northwest Side Community Development Corp.
Layton Boulevard West Neighbors	Riverworks Development Corp.
Lincoln Neighborhood Redevelopment Corp.	Wisconsin Women's Business Initiative Corp.

#### **Sample Listing of Employers Hiring Area Residents in 2009**

Gud Fud, Inc.	National Auto Tech
Transfer Pizzeria & Café	Sheer Magic Care, LLC
Scott's Construction & Building Supply	Guarding Your Angels. Inc.
Jewell Management, LLC	El Tonero Peruvian Restaurant
Scented Garden, LLC	Gluten Free Trading Company
Comcentia, LLC	Clinica Latina, SC, Inc.
Tala Furniture	Sanchez Painting & Decorating
Mimmie's Café, Inc.	Lopez Bakery Corporation
Blue Moon Child Care Service	GH Contractors, LLC
Safeway Abatement Company, LLC	Power Builder's, LLC
Let's Party, LLC	Bustamante Media, LLC
First National Tire Recycler	AEA Company, LLC
Best Choice Mechanical	Lucky & Son, LLC
Star One Limousine Service, LLC	Aquino Taylor Designs
White Glove Environmental	Cream City Studios, LLC
Custom Woodworking, LLC	Ray's Mobile Services

#### **Sample Listing of Job Titles of Jobs created in 2009**

Lead Abatement Supervisor	Teacher/Supervisor
Manager	Barber
Clerk Designer	Nail Technician
Owner/Acupuncturist	Mechanic's Helper
General Construction Manager	Head Cook
General Laborer	Office Manager
Lead Teacher	Technical Assistant



## Career Youth Development, Inc.

2601 N. Dr. Martin Luther King, Jr. Drive - Milwaukee, Wisconsin 53212 - Phone: 414-264-6888 – Fax: 414-264-5622

Email: LoweryShirley@yahoo.com– Web Address: YourCYD.com

### First-Time Home Buyer Program

March 2, 2010

#### CYD Founders

Mr. Charles L. Walton  
*Chief Executive Officer*

Claretta “Mother Freedom” Simpson  
*Founder*

Ms. Jeannetta Simpson-Robinson  
*Founder*

#### CYD Policy Board Members

Mr. Earl Hill, Sr.  
*Chairman*

Mr. Robert Spindell, Jr.  
*Vice Chairman*

Mr. Cy White  
*Business Committee*

Mrs. Margaret A. Gutter  
*Public Relations Committee*

Mr. Jerry Smith  
*Chairman*  
*Public Relations Committee*

Mr. Morris Brazil  
*Chairman*  
*Personnel Committee*

Attorney Barbara Franks  
*Personnel Committee*

The Honorable Leon Young  
*Public Relations Committee*

Chairman Joe Davis  
Community & Economic Development Committee  
200 E. Wells Street  
Milwaukee, WI. 53202

#### Re: 2009 First Time Homebuyer Statistics & Data

Dear Chairman Davis & Members of the CEDC for Milwaukee:

I begin by thanking you for taking the time to meet with me and others of my colleagues in our consortium of First Time Homebuyer Programs in the City of Milwaukee.

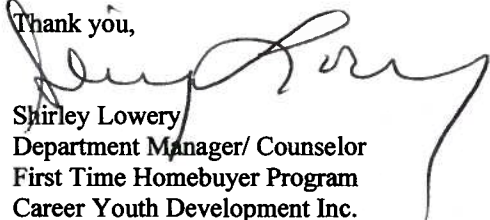
Career Youth Development's (CYD) First Time Home Buyer Program had a successful year in 2009. Of course, as you know, our goal continues to be to get low-to moderate income clients into good loans and homes. We're happy to announce that we surpassed our city projected goal of 26 home closings and actually closed on 48 homes! The homes purchased in 2009, through our program, ranged from \$40,000 to \$133,000 totaling \$3,411,000 in real estate transactions.

You also know that we hold home buyer workshops every month free of charge to clients. In 2009 we held 28 first time home buyer seminars and served over 200 people within the year with home buying education and counseling.

CYD has been doing homebuyer Education and Counseling for over 18 years. We work to ease the discomfort of buying a home for the first time through our education & counseling.

Again I thank you for the opportunity to meet and address you as well as your fellow colleagues on the Committee. And we humbly look forward to continuing the work of helping those least likely among us to achieve the American dream of becoming a homeowner!

Thank you,

  
Shirley Lowery  
Department Manager/ Counselor  
First Time Homebuyer Program  
Career Youth Development Inc.

CC: Full Community & Economic Development Committee for the City of Milwaukee  
Charles L. Walton, CEO Career Youth Development Inc.  
File Copy



Photo taken by Jim Bovin

# True Story of SUCCESS



***"You have an interesting combination of people with all the skills that you don't have as a single owner. It's a promising strategy."***

**– Wendy Baumann  
WWBIC President / CVO**

Two couples. A brother. And a local celebrity chef. This multi-talented combination has launched Milwaukee's hottest new pizzeria café, uniquely housed in a former Walker's Point pharmacy, with handmade wood tables and original, stained-glass windows. A \$57,000 WWBIC loan and business assistance fired up the oven. Chef Vasyi Lembersky crafts more than 40 critically-acclaimed signature pizzas, from garlic-based to traditional, seafood to specialty; using fresh, local, organic ingredients. The café opens at 11 a.m. with "the best lunch deal in town." In a tough economy, the partners believe their concept of good food at bargain prices will have staying power.

**Transfer Pizzeria Café**  
101 W. Mitchell Street  
Milwaukee, WI 53204  
414-763-0438  
[www.transfermke.com](http://www.transfermke.com)



# Linking Service to SUCCESS

## Our Mission

The Wisconsin Women's Business Initiative Corporation (WWBIC) celebrates more than 20 years of entrepreneurship, opportunity, and success! Our services include direct loans and access to other capital, quality business education, business assistance, financial awareness and asset-building programming. WWBIC is a nonprofit, statewide economic development corporation with an emphasis on low-wealth individuals, women, and people of color.

## It's all about our clients...

Each WWBIC loan client creates an average of 2.7 jobs by starting or expanding a business. Clients realize economic self-sufficiency through creating employment for themselves and others in their communities.

## Achievements over the past 20 years

- We have directly financed more than 820 businesses
- Assisted in the creation of 2,700 jobs statewide
- Lent more than \$13.6 million to small business owners
- Served more than 29,000 individuals

## Economic Development Achievements in 2007 alone

- Assisted in the startup, expansion and sustainability of more than 200 businesses
- Boosted the economy through the creation and retention of 500 jobs
- Approved \$2.6 million in direct loans to 80 business clients
- Leveraged an additional \$4.5 million in loans from other financial sources for our business clients
- Provided classroom or individualized education to 2,600 people

## Achievements through Financial Awareness / Asset-Building Programming

- 72 low-wealth individuals have become first-time home owners, leveraging more than **\$7 million in Milwaukee area housing sales**
- 45 people have started or expanded their businesses
- 42 people have returned to school for post-secondary education

## Wisconsin Saves...

[www.americasaves.org](http://www.americasaves.org)

## Coffee With A Conscience

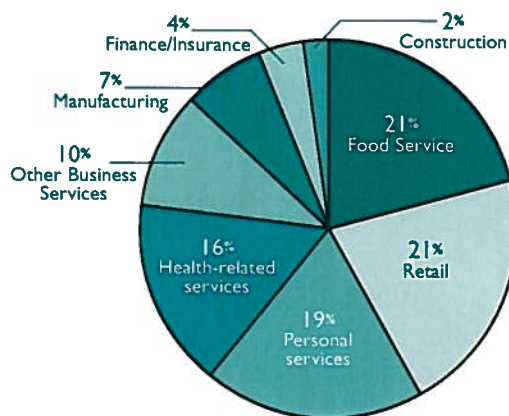
WWBIC's social business venture, Coffee With A Conscience, provides a hands-on learning lab for our clients while contributing to earned income.



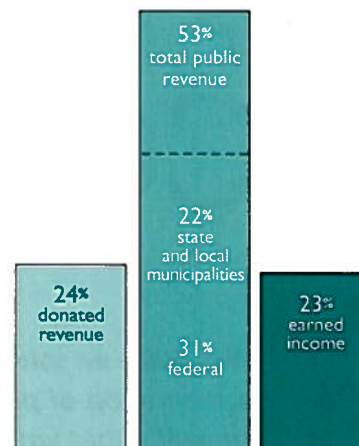
## A SNAPSHOT OF OUR CLIENTS



## BUSINESSES IN OUR LOAN PORTFOLIO



## HOW WE ARE FUNDED



WWBIC's financial statements have been audited by Virchow Krause for nearly twenty years.

10/08

Coffee With A Conscience  
Milwaukee Art Museum  
700 N. Art Museum Drive

Coffee With A Conscience  
Schlitz Park Business Center  
1555 River Center Drive

## WWBIC MILWAUKEE

2745 N. Dr. Martin Luther King Jr. Dr.  
Milwaukee, WI 53212  
Phone: 414-263-5450  
Fax: 414-263-5456  
[www.wwbic.com](http://www.wwbic.com)

## WWBIC SOUTH CENTRAL

2300 S. Park Street, Suite 21  
Madison, WI 53713  
Phone: 608-257-5450  
Fax: 608-257-5454  
[www.wwbic.com](http://www.wwbic.com)

## WWBIC SOUTHEAST

600 52nd Street, Suite 130  
Kenosha, WI 53140  
Phone: 262-654-1234 ext. 114  
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[www.wwbic.com](http://www.wwbic.com)

**City of Milwaukee**  
**Community and Economic Development Meeting**  
**Thursday, March 11<sup>th</sup> City Hall Room 3<sup>rd</sup> Floor, Room 301B**

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*Summary of The Wisconsin Women's Business Initiative Corporation's  
Community and Economic Development Impact of 2008 and 2009*

**Organization Overview**

The Wisconsin Women's Business Initiative Corporation is a national leader in job creation and retention through enterprise development, business creation, expansion, and sustainability. We provide access to capital including direct lending with access to other capital, one-on-one business assistance, business education, and financial awareness education programming.

Despite the economic distress which is affecting communities across Wisconsin, WWBIC continues to take great economic development strides in the City of Milwaukee, truly helping our clients increase their incomes and attain economic self-sufficiency for themselves and their families.

**Population Served**

While our services are available to everyone, our mission emphasis is on low-wealth individuals, women, and people of color.

**WWBIC's 2009 Client Profile:**

- 75% people of color
- 71% female
- 72% low-to-moderate income

**Technical Assistance Summary, 2008 and 2009**

**(a) Full and Part Time Jobs Created and Retained in the City of Milwaukee**

In a time where the unemployment rate is at record highs in the United States, WWBIC is helping to retain jobs that already exist, and also create new employment right here in Milwaukee!!

**In 2008 and 2009 WWBIC created or retained 119 jobs:**

- Created 70 full and part time jobs, 81% of which are held by LMI individuals
- Retained 49 full and part time jobs, 85% of which are held by LMI individuals

**In 2009 alone WWBIC created or retained 33 jobs:**

- Created 24 full and part time jobs, 91% of which are held by LMI individuals
- Retained 9 full and part time jobs, 88% of which are held by LMI individuals

**Job titles include:**

-Business Owner	-Carpenter	-Program Director	-Cook	-Acupuncturist
-Manager	-Crew Member	-Stylist	-Teacher	-Consultant

**Wage range:**

WWBIC's clients create and retain a wide variety of jobs. Specifically in 2009, the jobs created and retained ranged from part time jobs which pay Wisconsin's minimum wage of \$7.25 an hour to salaried managerial positions which pay over \$45,000 per year.

*Wisconsin Women's Business Initiative Corporation*  
2010 Community and Economic Development Presentation

Please consider a visual summary of WWBIC's annual projections as compared to our actual impact:

2008-2009 Cumulative Annual Projections	Actuals	
	Total	LMI
33 Full Time Job Creations	40	33
21 Part Time Job Creations	30	24
21 Full Time Job Retentions	30	27
11 Part Time Job Retentions	19	15
<b>Total Job Creation and Retention</b>	<b>119</b>	<b>99</b>

2009 Annual Projections	2009 Actual		2008 Annual Projections	2008 Actual	
	Total	LMI		Total	LMI
8 Full Time Job Creations	13	11	25 Full Time Job Creations	27	22
6 Part Time Job Creations	11	11	15 Part Time Job Creations	19	13
6 Full Time Job Retentions	7	6	15 Full Time Job Retentions	23	21
6 Part Time Job Retentions	2	2	5 Part Time Job Retentions	17	13
<b>Total Job Creation and Retention</b>	<b>33</b>	<b>30</b>	<b>Total Job Creation and Retention</b>	<b>86</b>	<b>69</b>

*(b) New Business Creations*

**In 2009 alone, WWBIC aided in the creation of 8 City of Milwaukee businesses:**

*Enigma Calming Style Boutique*  
3475 N. Oakland Ave.  
Type: Salon

*Erberts and Gerberts*  
2338 N. Farwell Ave.  
Type: Restaurant

*Handsome Barber Shop*  
2701 N. Teutonia Ave.  
Type: Barber Shop

*Victory 44 Construction*  
4429 N. 36<sup>th</sup> Street  
Type: Construction

*Extended Minds, LLC.*  
1546 N. 8<sup>th</sup> Street  
Type: Business Consulting

*Southern Gentlemen*  
7313 N. Teutonia Ave.  
Type: Pest Control

*Milwaukee Community Acupuncture Clinic*  
2915 S. Kinnickinnic Ave.  
Type: Acupuncture Clinic

*Mama's Finest Cleaning Inside & Out*  
1915 N. Dr. Martin Luther King Jr. Dr.  
Type: Cleaning

**In 2008, WWBIC aided in the creation of 3 City of Milwaukee businesses:**

*Hoops Carryout*  
3070 N. Dr. Martin Luther King Jr. Dr.  
Type: Restaurant

*Scented Garden*  
275 W. Wisconsin Ave.  
Type: Bath and Body Shop

*Cold Spoons Gelato*  
5924 W. Vilet Street  
Type: Gelato Shop

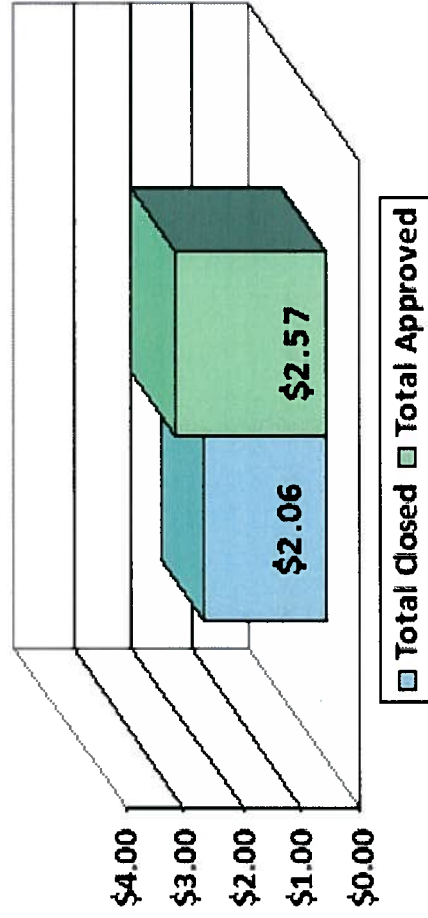
***"People at WWBIC have a great understanding of small business. WWBIC's been awesome for us."***

*Michael Schmidt, owner of Bella's Fat Cat, Milwaukee*  
*WWBIC Loan Client, 2-18-2010*

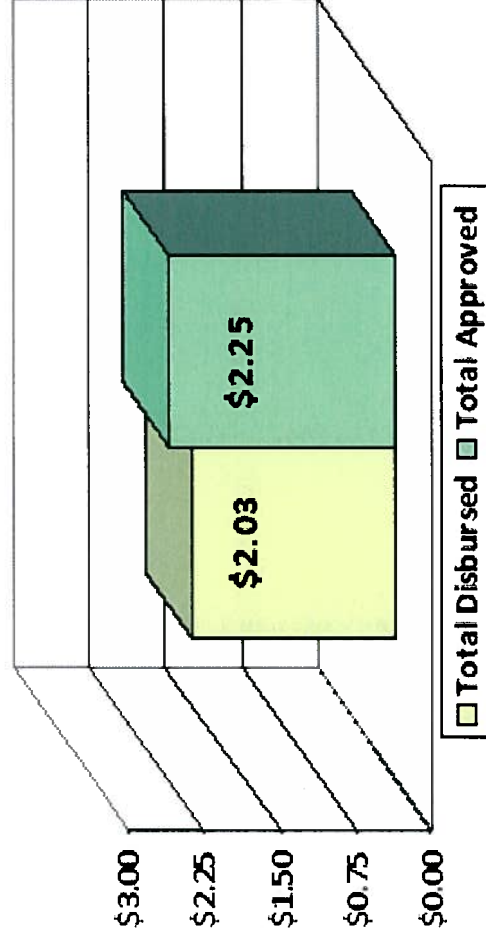
# *The Wisconsin Women's Business Initiative Corporation*

A Visual Summary of Lending Progress

**2009 Lending Activity in Millions**



**2008 Lending Activity in Millions**

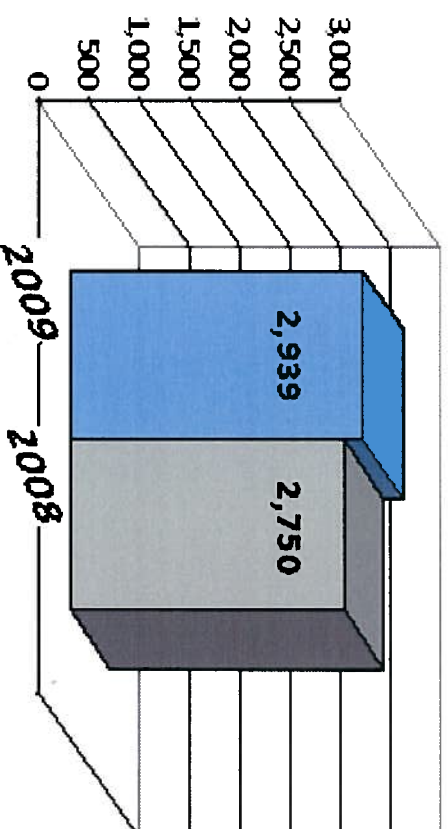




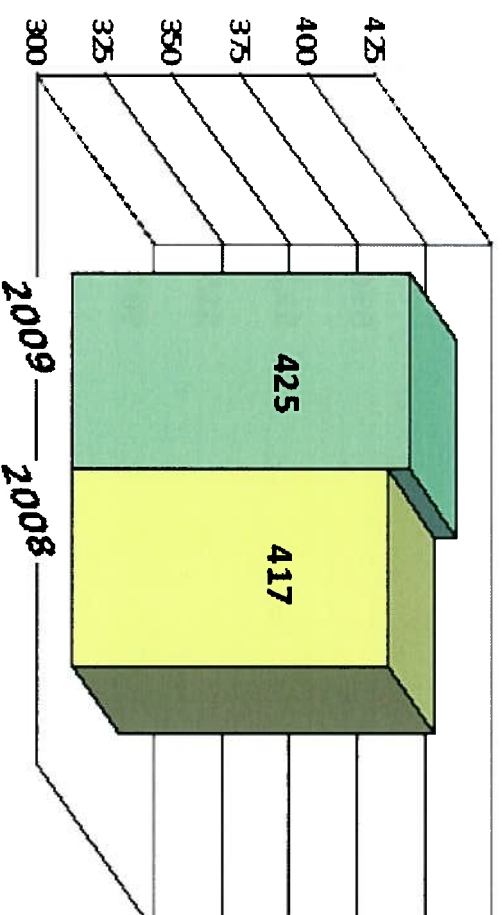
# *The Wisconsin Women's Business Initiative Corporation*

A Visual Summary of Business Education Progress

**Individuals Receiving Training &  
Business Assistance**

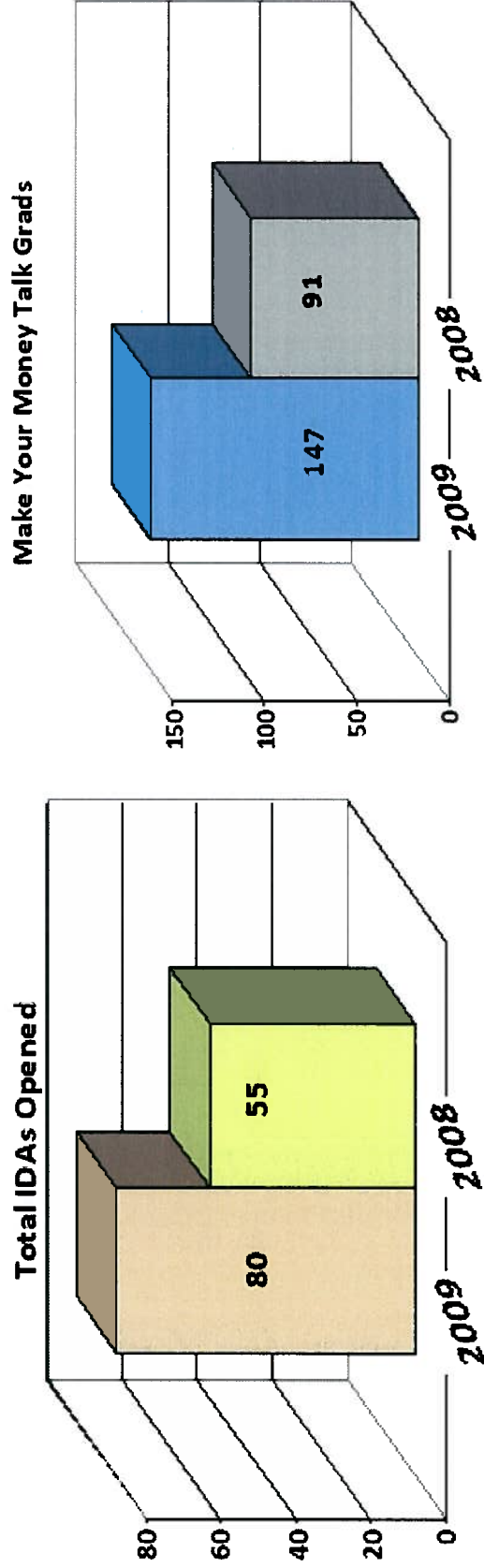


**Total Number of Workshops**

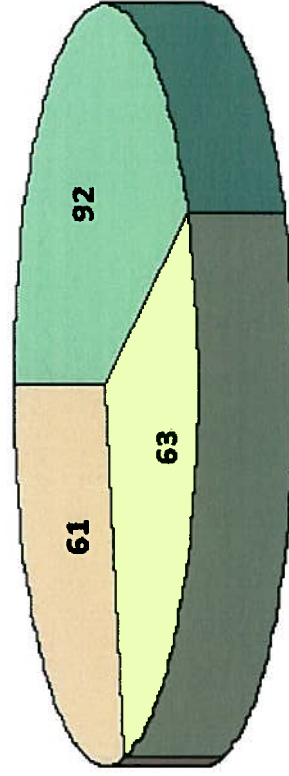


# The Wisconsin Women's Business Initiative Corporation

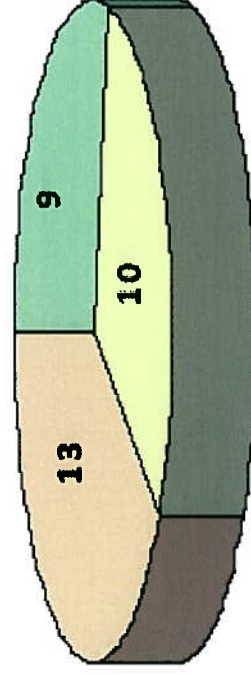
A Visual Summary of Financial Awareness Progress



Cumulative IDA Outcomes



2009 IDA Outcomes



- # Homes purchased
- # Businesses opened/expanded
- # Individuals returning to school



## Avenues West Overview

Located just west of downtown, Avenues West serves a densely populated urban neighborhood. The 90 square blocks of the Avenues West neighborhood offer recreation, business, education and varied living opportunities to almost 30,000 people on a daily basis. Avenues West is bounded by I-43 on the east, 27<sup>th</sup> Street on the west, I-94 on the south and Highland Avenue on the north.

Prior to its incorporation, the Association was known as the Avenues West Neighborhood Association and was dedicated to the revitalization and development of the historic "Grand Avenue" district.

On June 25, 1987, the Avenues West Association, a not-for-profit membership association, was incorporated. It serves as an advocate for development and revitalization, aesthetic enhancements, cooperative marketing and planning, networking, and the promotion of safety throughout the neighborhood. The association and its partner the Avenues West Business Improvement District (BID No.10) provide leadership in promoting community stability, balance of land uses and economic development. The BID, with a separate seven member board of directors, was formed in late 1992 as authorized under Wisconsin Statutes and continues to contract with the Association for staffing and goal implementation. During the past 22 years, Avenues West staff size has fluctuated from one part time person to two and one half full time employees.

In addition to coordinating the neighborhood's Landlord Compact over the past sixteen years, the Avenues West Association currently coordinates meetings for business operators and property owners on 27th Street. It has two Task Force groups, Safety and Security, and Economic Development, which include experts in the specified fields who collaborate to achieve improved conditions for the neighborhood. In 2008 Avenues West became the sponsoring organization for the SOHI Main Street program on 27<sup>th</sup> Street.

The Association also holds five general meetings each year featuring informational speakers. One of those meetings is the Association's only fund raising event - the annual "Together We Can" Awards Luncheon and Silent Auction. This is when the Community Investment and Impact Awards are presented.

The Avenues West Association's eleven member board of directors represents a broad range of neighborhood stake holders. The staff can be reached at: 624 North 24<sup>th</sup> Street, Milwaukee, 53233. Telephone 414-933-0640; fax 414-933-0641; or, by e-mail at [avenueswest@sbcglobal.net](mailto:avenueswest@sbcglobal.net). The SOHI manager can be reached directly at 414-933-9007 or by e-mail at [manager@sohidistrict.org](mailto:manager@sohidistrict.org)

## SOHI District – Main Street

Working with volunteers, supporters and funders, the SOHI District made major strides in 2009. From committee planning to community clean-ups, the district worked to garner support among local businesses, residents and the City of Milwaukee to make change. Crime and safety issues were at the forefront of many SOHI District work plans and activities. The SOHI District online presence has risen to new heights using technology to connect supporters and funders across the country. The SOHI District has been able to increase efforts in reporting property violations in addition to working with the Milwaukee Department of City Development (DCD) on a comprehensive Master Plan to address traffic congestion and the physical condition of the street. Other major highlights for the year include the grand opening of Izzy's on State (a local restaurant) and the continuation of the SOHI Saturday and Taste of SOHI events.

**Goals:** Following work plans from 2008, the SOHI District was able to reach the established 2009 goals. Both Taste of SOHI and SOHI Saturday were held this year with a combined attendance of 300. The district held several clean-ups, business security trainings and was involved with three security surveys. The district opened a new business, creating 7 full time equivalent (FTE) jobs. Using art by local students, seven vacant storefronts received an artistic make-over. SOHI held its first Arts and Antique Seminar in the spring.

### ▪ **Promotion Committee (PC)**

Increasing SOHI's online presence, while promoting local news and business, was a daily activity for the Main Street manager. The district produced and uploaded 36 videos representing over 150 hours of video edit time on SOHI's YouTube Channel. Constant Contact was the new email format for 2009, adding an additional 140 email addresses for a total of 688 active emails on SOHI's email list. Despite the economic climate, the district was able to fundraise for both annual events, Taste of SOHI and SOHI Saturday, while partnering with local churches St. Paul Lutheran Church and Greater Utopian Pentecostal Church. The district also played as a backdrop to an independent Hollywood film entitled "No God, No Master." MATC Professor Steve Burleson's E-Commerce class provided pro bono services to the district resulting in a savings of \$10,000.00 in website design cost. The new website will be running in 2010 providing information access to SOHI, Avenues West Association (AWA), and Business Improvement District (BID) #10.

### ▪ **Economic Restructuring Committee (ERC)**

The ERC held an Arts and Antique Seminar with the support of the Small Business Administration, County of Milwaukee and DCD. 200 hours of time were spent with local businesses providing support and direction ranging from sales and promotion to development and façade improvements, throughout the year. A total of 70 district letters for business and real estate development were sent to various parties.

- **Design Committee (DC)**

The Design Committee worked this year with DCD and the Wisconsin Department of Transportation on the SOHI District's streetscape plan and timeline. The committee also developed cost estimates and guidelines for the streetscape plan, plus guidelines for SOHI funding of façade projects. Main Street manager Keith Stanley reported close to 300 property violations to the Milwaukee Department of Neighborhood Services (DNS). Over 80% of the reported violations were verified. Led by Quorum Architects, the SOHI District addressed two vacant properties with artwork by local Milwaukee Public School students. The former West Pointe Condominium project received an artistic window treatment with the assistance of local artist Tia Richardson and Neighborhood House youth.

- **Job Creation**

Izzy's restaurant opened in July to much fanfare with both local articles and television spots. The restaurant created seven FTE jobs and has energized the State Street business community.

- **Safety**

There were three security surveys completed by the Milwaukee Police Department with the assistance of the SOHI District manager. Overall crime for the Avenues West and Historic Concordia areas was down from the past few years, however, the SOHI District did see a small increase in criminal damages and robbery. The surveillance program on North 27<sup>th</sup> Street has been successful in assisting police and resulting in several arrests and the issuing of tickets to violators. Operation Red Light was also a Milwaukee Police Department initiative that worked to successfully decrease prostitution in the area.

SOHI volunteers participated in a community clean-up with the Milwaukee Police Department and Neighborhood House and plan more for 2010. Working with the Avenues West Association, SOHI assisted in graffiti removal by providing regular documentation for relay to the Milwaukee Police Department and DNS.

**SOHI District Manager and Committee Chairs:**

District Manager – Keith Stanley

Design Committee Chairman – Brian Scotty

Economic Restructuring Committee Chairman – John Hennessy

Promotion Committee Chairman - Open

Organization Committee Chairman – June Moberly



March 11, 2010

Milwaukee Common Council  
Community & Economic Development Committee (CED)  
Room 301B, City Hall  
200 East Wells Street  
Milwaukee, WI 53202

RE: Special Economic Development Accomplishments for 2009

Community & Economic Development Committee:

The SOHI District enjoyed its fifth birthday on February 2010. This milestone is an opportunity to review the many successes and challenges of 2009. Again, the district focused on 1) crime reduction, 2) increasing property value, 3) increasing economic vitality and improving the neighborhood quality of life. These goals worked in conjunction with the Main Street Milwaukee principles of 1) design, 2) promotion, 3) organization and 4) economic restructuring.

Items which are in **bold print** will be associated with 1) An overview of the organization; 2) Population served; 3) Technical assistance provided to for-profit businesses (# of Full & Part Time jobs created, # of Full & Part Time jobs retained for 45 days), and the # of new business start up/expansions; 4) Special Projects

#### Overview

2009 was the fourth year for the SOHI District, a Main Street Milwaukee program funded by the City of Milwaukee's Community Development Grants Administration (CDGA) and Local Initiatives Support Corporation. SOHI is centered along 27<sup>th</sup> Street from St. Paul Avenue to Highland Boulevard. This year the SOHI District strengthened relationships with the Avenues West BID, local businesses and property owners and many City of Milwaukee departments. There are 32 businesses in the district and approximately 50 property owners.

#### Improvement Neighborhood Quality of Life (Design)

The SOHI Design Committee led by Brian Scotty of Quorum Architects worked tirelessly to provide support to local businesses, developers and the Department of City Development.

1. Meet with and provided assistance to local developers.
2. Meet with local sign companies and local businesses to improve signage in the district on a small scale.
3. Worked with and provided support to DCD on the PDI/Graef Corridor Analysis Study.
4. The district was successful in securing the SOHI District Masterplan as part of Avenues West Redevelopment Plan however this plan has yet to be adopted by the Common Council.
5. Assisted local artist in reviewing possibly district art work.
6. The district was unable to get the necessary funding to make serious change to our 3 targeted facades in 2009.

7. The district was unable to work successfully to make major improvements in signage.
8. Partnered with local artist Tia Richard and Neighborhood House youth on West Pointe window art work.
9. Partnered with Quorum Architects and MPS on two "art walls" on State Street.

#### Improvement Neighborhood Quality of Life (Organization)

The SOHI Organization Committee made gains in 2009 reaching out to local communities and partnering with organizations.

1. Added an additional member, Bob Greene, Executive Director of Merrill Park Neighborhood Association.
2. Held the SOHI District Spring Update.
3. Met with DCD Commissioner, Rocky Morcoux on the district development.
4. Developed and approved work plans of each committee
5. Engaged developers on projects in the district.
6. Deterred negative, low quality businesses and projects in the district
7. Applied for several grants including the MetLife Applied Technology Grant.
8. **Raised close to \$30,000** in funding or in-kind donations for Taste of SOHI, SOHI Saturday and district funding.
9. Accounted for 400 hours of volunteer hours on behalf of the district.
10. Attended the National Main Street and Reclaiming Vacant Properties Conference.

#### Increase Economic Vitality (Promotions)

The SOHI Promotions Committee became the guarding of the SOHI District brand working fervently to showcase the district in the most positive light.

1. Partnered with Greater Utopian Church and St. Paul's Lutheran Church on the 5<sup>th</sup> Taste of SOHI and SOHI Saturday with over 300 in attendance.
2. **Produced and uploaded 36 YouTube videos.**
3. Worked with MATC to design and develop district website.
4. Added an additional 140 emails to Constant Contact for a total of 700.
5. District played backdrop to Hollywood film entitled, "No God, No Master".
6. Gave tours of the district.

#### Increase Economic Vitality (Economic Restructuring)

The Economic Restructuring Committee worked to secure development and business opportunities in the district.

1. Developed and hosted the Arts and Antiques Symposium with the County and SBA.
2. Promoted the sale of City of Milwaukee-owned property within the district.
3. Started work and discussion on a SOHI District Fresh/Flea market.
4. Engaged SHARE Milwaukee on ideas regarding fresh food for the district.
5. **Provided over 200 hours technical assistance support to local businesses.**
6. Sent over 70 letters to targeted businesses and developers.
7. **Assisted Izzy's restaurant in the district representing 9 new jobs.**
  - a. The district was able to use 5 of the 9 to secure pay-for-performance funding.
  - b. Hourly salary ranged from \$9.00/hour, \$7.25/hour and \$2.33/hour plus tips for wait staff.
  - c. All jobs counted for pay-for-performance extended beyond the 45 day retention.



Improvement Neighborhood Quality of Life (Safety and Security)

In terms of Safety and Security the district continued to make the necessary improvements that is leading to dramatic decreases in crime.

1. **Maintained the use and support of the surveillance program.**
2. Held a community clean-up with the assistance of MPD, Neighborhood House and WISN.
3. **Held two business trainings with the support of MPD and Marquette University.**
4. Coordinated 3 security surveys with the assistance of MPD.
5. Coordinated efforts with MPD on Operation Red Light.
6. Coordinated with the community liaison officer, Hue Kong, Derrick Lemmie and Charlotte Brown on problematic businesses and areas in the district
7. Coordinated community efforts with the AWSSTF, AWLLC, AWA, DPW and DNS.
8. **The district reported 300 property code violations.**
9. Assisted with National Night Out.
10. Assisted Avenues West Association with graffiti removal.

The SOHI District is looking toward to a bright future. With support from the City of Milwaukee and other stakeholders, rather it be the business or property owner in the district or the larger employers of the area we will continue to see our community, neighborhood change for the better.

Regards,

Keith Stanley  
SOHI District Manager

# Lincoln Neighborhood Redevelopment Corporation

## Special ED accomplishments 2009

### Organization Overview

LNRC was created in 1988 as a Community Development Corporation affiliated with Lincoln State Bank, with the initial mission to redevelop a relatively small area around the Bank's main and original office at 13<sup>th</sup>/Lincoln. In 1991 the organization started the Lincoln Fund with \$450,000 in private loan funds earmarked for small businesses in the Bank's surrounding area. The Lincoln Fund has increased exponentially since then and currently contains over \$2,842,626 between loans and cash. In 2008 Lincoln State Bank and its affiliates were purchased by Harris Bank, which continues to support the organization.

In 1999 CDBG granted LNRC an original \$125,000 for a Revolving Loan Fund that would be used in secondary position to the Bank dollars in the Lincoln Fund. Several additional grants were made by CDBG, for a total of \$412,415. (\$125M, \$135M, \$127M). LNRC serves a mostly Hispanic population and has specialized in providing loans and Technical Assistance to start-up businesses. Most of these businesses are retail. Some statistics:

### CDBG Revolving Loan Fund

25 loans made since beginning of the Fund (1999)

\$512,415 Grant Funding from 1999 – 2009

\$355,000 of the funds were used at end of 2009

\$646,642 total original balance of loans made CDBG portion

Generated over \$355,000 in Program Income, \$69,066 in 2009 alone

\$2,890,200 total original balance of loan packages

\$280,163 loans receivable CDBG portion on 12/31/2009

\$313,030 funds available to be lent out on 12/31/2009

CDBG Revolving Loan Fund now consists of \$593,193 (cash + loans), after an initial investment by the City of \$355,000

No funds were ever lost

### Technical Assistance

- Primarily one-on-one assistance; type of assistance provided: see table (not exhaustive)

Business Place	Financial Aspect	Loan Aspect	General Business Aspect	Other Resources
Visit and assess	Understanding statements	Help with credit issues	Employee issues	Grants
Scope of work	Help with projections	Understanding banking terms	Marketing	Certifications
Purchase real estate / process	Accounting program	Understanding commercial loan process	Link to business resources	Guarantees
Help with permits and coordination with city services	Understanding basic accounting concepts	Help with filling out forms and collecting loan documentation	Legal status	Help organize events such as grand openings
trades referrals	Set business up for success	Pre and Post closing assistance		Spanish translation

## **Job Creation**

- Number of jobs created (FTE): 6
- Number of jobs retained: (FTE): 4.5
- New or expanded businesses: 4 (Frank's Foods, Gluten Free Trading Co, Wildflour Bakery, Sheer Magic Care Day Care)
- Job titles and average pay:
  - 3 store clerks
  - 2 day- care teachers
  - 1 day-care lead teacher
  - 1 day-care lead teacher/supervisor

**NOTICES SENT TO FOR FILE: 091215**

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