

## Delafield Street Redevelopment

March 15, 2019





# Letter of Interest

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**March 15, 2019**

City of Waukesha  
Community Development Department  
**Attn: Jeff Fortin, AICP**  
201 Delafield Street, Rm 200  
Waukesha, WI 53188

Dear Mr. Fortin:

Bear Development “Bear” & Construction Management Associates “CMA” in partnership with Engberg Anderson Architects “Engberg” are excited to submit the enclosed mixed-use, multi-generational development for the Delafield Street Redevelopment. Based in nearby Kenosha, our team has a history of close connections to the Waukesha area and we look forward to an opportunity to extend that relationship with a catalytic development at a gateway to Waukesha’s vibrant downtown.

With a history of successful developments and community involvement that stretches more than 33 years, Bear has strong Wisconsin roots. To fully understand community needs and deliver successful projects, we leverage both our history as a local, family-owned company and our extensive experience in mixed-use, residential, retail, hospitality, office and industrial development.

As a local family business, Bear takes pride in working well with our municipal partners. We recognize the trust and commitment required for a successful development partnership and work to ensure the needs of all stakeholders are understood and met. Positioned at an important gateway to Waukesha’s downtown, this site will be a significant architectural element with potential to shape

perceptions of the city. With this understanding, Bear is flexible, hardworking, and honest, with a history of delivering proposals that are realistic and preserve the character of the existing community while solving gaps in the available housing stock.

Our team is well positioned to propose a redevelopment plan that balances progression and creativity with fiscal realism and achievability. The extensive experience our team offers having completed several similar mixed-use projects in Wisconsin, along with the partnership that will be forged with the City of Waukesha and the greater community, will position this redevelopment for success.

Should you have any questions regarding our proposal, please do not hesitate to contact me at any time. We look forward to working with the City of Waukesha as both a partner and a neighbor in bringing the proposed Spring City Commons development to life.

Sincerely,



**S.R. Mills**  
President  
Bear Development

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# 1. Executive Summary



Bear Development “Bear” & Construction Management Associates “CMA” in partnership with Engberg Anderson Architects “Engberg” are pleased to submit the following proposal that will implement an innovative vision for the Delafield Street Redevelopment area. The proposal consists of a vibrant mixed- use, multi-generational development which will transform an important gateway into downtown Waukesha. This development will make a statement in which the neighborhood, city, stakeholders, and new residents can take pride.

The site currently consists of a vacant former automobile repair facility, vacant land and the City Hall Annex Building that is set to be vacated in Spring 2021. The acquisition will be of Zone A and Zone B, Tax IDs:

- WAKC1305461 (0.49 acres)
- WAKC1305460 (1.88 acres)
- WAKC1306990 (1.01 acres)
- WAKC1305459 (1.54 acres)

This project will be a state-of-the-art, mixed use development that capitalizes on the rising demand for multi-generational housing. With experience in this unique housing structure, Bear is well-positioned for success. In this implementation, we are proposing a 69-unit, 4 story mixed-use and mixed income senior housing building, 18 townhomes assigned for individuals and families. The senior building will boast subsurface parking, well-portioned units, community room and amenity or commercial space. The senior building will sit immediately to the north of the current parking lot in Zone B, which will continue to be functional as visitor and customer parking. The remainder of the 4.92 acres will be comprised of 18 townhomes with no age restrictions. With ample green space and recreational areas, the site will be a functional environment for all ages. The senior building will feature a mix of one- and two-bedroom units and all the townhomes will be three bedrooms.

The development will include 120 surface parking stalls, 55 subsurface spaces, and 8 garage spaces which will provide adequate parking for the various complimentary uses. Residents of this development will enjoy on-site amenities and close proximity to the vibrant downtown with its eclectic mix of shops and restaurants.

Our collective team is excited to share this vision which will help ensure a successful and sustainable mixed-use, multi-generational development in the heart of the city. As part of the revitalization efforts, Bear would look to the City for TIF assistance which would be approximately 20% of development costs. These funds would be allocated towards demolition, parking, site infrastructure, and other related costs. Bear would also explore additional soft funds as a capital source that could be utilized for this development. Bear is prepared to offer \$550,000 for the four parcels.

**S.R. Mills**  
**Bear Development | Construction**  
**Management Associates, Inc.**

262.842.0452  
smills@beardevelopment.com

4011 80th Street  
Kenosha, WI 53142



## 2. Project Narrative

### Project Narrative

The City of Waukesha has expressed interest in the creation of a new residential mixed-use development on 4 severely underutilized parcels. Housed in an extremely desirable location at one of the key gateways of Waukesha's vibrant downtown, the Delafield Street Redevelopment site consists of approximately 4.9 acres of city owned land. Based nearby, our team is very familiar with this site and have had successful working relationships with Waukesha in the past. We look forward to the opportunity to extend this relationship by bringing an integrated, community-enriching development to the area.

The site will house a vibrant multi-generational development that will blend age-restricted units with non-restricted units. Though primarily targeting an active and independent senior population (with 69 senior housing units), a portion of the development will be dedicated to family housing. The proposed 18 townhomes will be open to all ages and will sit in Zone A. By architecturally complimenting the single-family homes that surround the site, the development will provide a thoughtful transition that reflects the character of the community. The site will also feature amenity or commercial space which is currently envisioned near the intersection of Delafield Street and Madison Street. The commercial space tenants could consist of complimentary local service-oriented businesses.

With demonstrated success in the development of multi-generational housing, Bear is a proponent of the community-enriching effects of this unique form of development. With many of the benefits of senior housing, including community building and access to targeted amenities, multi-generational developments additionally minimize the ill-effects of isolation and family separation that may be a concern in more traditional senior housing.

### Proposed Buildings

In total, the proposal consists of 87 multi-generational units. This will include a 4-story mixed-use and mixed-income senior housing building that will be comprised of 42 large one-bedroom units and 27 two-bedroom units. We are proposing 18 freestanding 3-bedroom townhomes without age restriction. Amenity or commercial space is also proposed at the southernmost part of the senior building.

A mix of natural stone, brick, board and batten and lap siding could be used on the exterior of all buildings, creating a blended atmosphere that will be an appealing architectural transition between the commercial downtown and nearby residential areas.

### Proposed Approach

Our proposal contains an option for consideration with the intent that all stakeholders will participate in the development and implementation of the most viable solution to meet the City's goals for the redevelopment of one of the main gateways into downtown and the overall value proposition for all partners.

We envision a process that includes the following steps:

1. Master Site Plan Development
2. Market Study
3. Preliminary Design
4. Secure Funding Sources
5. Construction Documents
6. Implementation

Our team believes in an interactive reiterative model of collaborative design. We propose that all stakeholders become participants in a multi-step process. Each of the steps in this sequence will combine the expertise of all those assembled: the planning team and designers, staff, members and volunteers, patrons and community leaders. Together we will identify the parameters within which a solution must be found, create a series of potential solutions, apply

a systematic set of measures to evaluate those options and progressively develop the ultimate solution to the particular needs of the community. The synergy is focused on the multi-dimensional challenges of the project in a creative, rational manner.

#### 1 [ Master Site Plan Development ]

**Stakeholder Interviews** include detailed conversations with the City and neighborhood interest groups. The purpose of the interview process will be to arrive at a comprehensive understanding of the various Stakeholder interests implicit to this development.

**Development Plan Refinements** will reflect the insights gained from the Stakeholder Interviews, as well as the Project Team's market driven expertise. The purpose of the refined plan will be to establish a baseline mutual understanding for the final direction of the development plan.

#### 2 [ Residential Market Study ]

The housing study recently completed by the city provides valuable insight into the current market. To supplement this comprehensive study, Bear will plan to solicit an additional independent market study.

#### 3 [ Preliminary Design ]

This process is undertaken as having five distinct phases: **Understand, Explore, Test, Refine** and **Balance**. Each phase will feature a series of workshops focused on the specific issues at hand. In addition to gathering important feedback from the core planning team, active participation by the broader community can help ensure a clear understanding of the need for the project, the rationale behind the design, an appreciation for the cost of the project, and lead to an intelligent understanding of the benefits to be derived from such an investment.

## 2. Project Narrative

We propose a multi-part workshop process, meeting separately with the planning team, RFP Selection Committee, RDA, Plan Commission and Common Council. If desired, this can be extended to include the broader community. Alternative plan diagrams will be developed in order to explore all factors that impact the planning of the site. An attempt is made to find and test as many options as possible, tossing out those less feasible and beginning to focus design direction on the most viable.

The intent is to foster a series of environments where each group is comfortable to express their thoughts, aspirations and concerns without restraint. Our process starts fresh with each group to allow a full range of exploration and avoid unintended limitations. As the discussion progresses, and unidentified options considered by earlier groups will be brought forward for considerations. Toward the end of the process, the full assembled group will be asked to rate the options and identify the preferred group of options deemed most viable and suitable for further investigation.

At the end of each workshop we would seek to reconvene with the planning team to discuss what was heard through the course of the day and confirm the direction and options to refine.

Each of the five workshops will become more specific in terms of detail, shifting from the scale of the neighborhood to the layout of the residential units. The workshops will explore issues of arrival, accessibility, safety, function, image, materials, building systems, technology, finishes and furnishings. The final deliverable of this phase will be a comprehensive design report that outlines what the development will look like, how it will function and how much it will cost.

### 4 [ Secure Funding Sources ]

### 5 [ Construction Documents ]

Once the design package is approved, we will begin a concentrated period of refinement of the documents for bidding and construction. During this period, the team will be in contact with the planning team to define remaining issues, specification language and terms and fabrication details. Draft sets of construction documents will be submitted for review at 30%, 70% and 95% phases of completion. This is in addition to completed construction documents for bidding. The team will also prepare final presentation renderings, as well as material boards for interior and exterior finishes.

### 6 [ Implementation ]

#### Bidding

The design team will fully participate in the process of advertising, administering and concluding the bidding phase of the work. This will include conduct of a pre-bid conference, processing of all bidders questions and preparation of any needed addenda, participating in the opening and tabulating of bids and recommendation of a preferred bid.

#### Construction

Beginning with a pre-construction conference organized by Engberg, we will handle all project progress documentation and review during this phase.

#### Post Construction

Upon completion of the Construction Phase, it will be our responsibility to verify the work is complete and consistent with the construction documents. We are available throughout the first year of occupancy to review the operations and performance of the facility relative to the design goals of the project.

## The Best Qualified Team

Our team is uniquely qualified to partner with the City on this catalytic gateway development. Our staff has worked together and individually on senior housing, family housing, mixed-use, and multi-generational developments. We possess a deep understanding of the needs and goals of this specific development and have a depth of experience implementing similar projects. Our team emphasizes a close and collaborative relationship with our municipal partners.



City of Waukesha Planning Team

Bear Development  
Developer

**S.R. Mills**  
Chief Executive Officer

**Adam Templer**  
Vice President of  
Development

**John Hotvedt**  
Vice President of Real Estate  
Portfolio

**Craig Bartsch**  
Project Manager



**John R. Reinhart**  
Vice President of  
Finance

**Jonah Hetland**  
Chief Operating Officer

**Luke Samalya**  
Development Analyst

Engberg Anderson Architects  
Architecture + Interior Design



**Mark Ernst, AIA, LEED AP**  
Partner in Charge

**Sarah Ponto**  
Senior Associate, Interior Designer

**Amanada Koch, AIA**  
Architect, Project Manager

**Nathan Van Zuidam**  
Architectural Designer

### 3. Team Overview **Bear Development**



Bear Development is part of the “Bear” family of companies. With roots dating back to 1924, Bear prides itself on its rich history of providing innovative solutions to complicated real estate developments. Since 1986, the company has been involved with the acquisition and development of residential, multifamily, hospitality, retail, office and industrial projects. The firm currently owns and manages real estate in Wisconsin, Texas, Wyoming, Georgia, South Dakota, Arkansas, Illinois, Minnesota, North Dakota, Florida, Iowa, Indiana and Virginia.

#### DEVELOPMENT

Bear Development specializes in residential, mixed-use, and commercial development. We bring the unique perspective of being an owner, developer, and contractor to each project. Our expertise allows us to provide comprehensive services in fee development, note acquisition, condominium conversions, and joint ventures. Our history and experience has established trusted relationships with investors, sellers, municipal officials, building partners, tenants and homeowners. Available services include:

- Site Identification
- Feasibility Analysis
- Redevelopment
- Budgeting
- Financial Modeling
- Cost Determination
- Closing Services
- Construction Services
- Marketing/Lease-up
- Operational Cost Assessment
- Asset Management

#### RESIDENTIAL & COMMERCIAL BROKERAGE SERVICES

With over 90 years of history, Bear Realty is one experienced residential brokerage firms. Bear Realty and Bear Commercial provide unsurpassed experience in all facets of commercial and residential real estate transactions. Services include:

- Site Acquisition
- Market Analysis
- Transaction Expertise
- Closing Expertise

#### CONSTRUCTION

Construction Management Associates, Inc. (CMA) provides general contracting and construction management services to Bear Real Estate Group as well as unaffiliated third parties. CMA’s reputation as one of the region’s top general contractors is a tribute to our highly skilled and experienced construction team. Services include:

- Plan review
- Value engineering
- Preliminary cost estimation
- Final cost estimation
- Construction Supervision
- Quality Control Systems
- Scheduling

#### PROPERTY & ASSET MANAGEMENT

Bear Property Management’s unwavering commitment to the long term quality, appearance and operation of all managed assets ensures the long term viability of our family of companies. Bear Property Management’s services include:

- Design Consultation
- Quality control inspection at completion of construction
- Marketing planning that satisfies fair housing laws
- Initial and renewal tenant certification
- On site management selection and supervision
- Long term asset management strategies
- Annual Budgeting



**S.R. Mills**  
Chief Executive Officer

S.R. Mills is the Chief Executive Officer of Bear Development and a principal of Bear Development, Bear Commercial, Bear Homes, and Construction Management Associates (CMA). Each company plays a pivotal role in the acquisition, development and construction of commercial projects and master planned residential communities.



**Adam Templer**  
Vice President of Development

Adam Templer is a Vice President of Development at Bear Development specializing in housing developments that utilize low-income housing tax credits, HUD’s Rental Assistance Demonstration (“RAD”) program and historic tax credits. He is responsible for the overall operations of the business unit which includes sourcing new opportunities and monitoring each project from inception through final



**John R. Reinhart**  
Vice President of Finance

John Reinhart is the Vice President of Finance for Bear Development, Bear Homes and Construction Management Associates (CMA). John has extensive background in real estate development and real estate accounting, including tax, audit and consulting.



**Jonah Hetland**  
Chief Operating Officer

Jonah Hetland is the Chief Operating Officer of Bear Development, Bear Homes and Construction Management Associates, Inc. Jonah has extensive background in Real Estate Development, Commercial Construction and Land Use Planning.



### 3. Team Overview Bear Development

#### COMPLETED PROJECTS

##### Retail

- Bradford Plaza: Kenosha, WI (9,200sf)
- Speedway Plaza: Kenosha, WI (21,500sf)
- Village Commons: Paddock Lake, WI (12,500sf)
- Village Plaza: Paddock Lake, WI (62,500sf)
- 5400 Washington Avenue: Racine, WI (8,000sf)
- Snap Fitness: Paddock Lake, WI (3,000sf Health Club/ Joint Venture)
- Aurora Health Center: Salem, WI (1,600sf)
- Pioneer Village: Racine, WI (20,000sf)
- Prairie Ridge Marketplace: Pleasant Prairie, WI (32,000sf)

##### Single Tenant Net Leased

- Starbucks: Bentonville, AK
- LaPetite Academy: Kenosha, WI (10,000sf)
- Dollar General: Hoboken, GA
- Family Dollar: Grafton, ND
- 6951 51st Street: Kenosha, WI (25,000sf)
- 5700 77th Street: Kenosha, WI (5,800sf)
- 6021 56th Ave: Kenosha, WI (9,070sf)
- Waterstone Mortgage: Pewaukee, WI (56,000sf)

#### CURRENT PROJECTS

- Market Square Phase II: Somers, WI (50 market-rate units)
- The Mariner: St. Francis, WI (221 market-rate units)
- Novation Senior Commons: Madison, WI (60 Units- 4% LIHTC, Senior Living)
- Fulton Commons: Fulton, IL (40 Units- 9% LIHTC)
- Scenic View: Slinger, WI (Rehab |Senior Community | 48 Units- 9% LIHTC)
- VMC Lofts: Kenosha, WI (Historic Conversion to Multi-Family | 42Units- 4% LIHTC)
- Eva Manor: Pleasant Prairie, WI (Multi-Family/Senior | 42 Senior Units/8 Multi-Family Townhomes- 9% LIHTC)
- Whitetail Ridge: Paddock Lake, WI (Multi-Family/Senior | 50 Senior Units/10 Multi-Family Townhomes- 9% LIHTC)

##### Multi-Family LIHTC

- Residences on Main: Twin Lakes, WI (24 Units- Senior, 9% LIHTC)
- Meadows of Mill Creek: Salem, WI (24 Units, 9% LIHTC)
- Arbor Green Apartments: Kenosha, WI (48 Units, 9% LIHTC)
- Silvercrest Apartments: Silver Lake, WI (36 Units- Senior & Family, 9% LIHTC)
- Cottonwood Trails: Cudahy, WI (49 Units- Senior, 9% LIHTC)

##### Market-Rate

- Market Square: Somers, WI (280 units)
- Lofts 2: Kenosha, WI (44 units)

##### Office

- The Crossings: Kenosha, WI (38,500sf)
- Concordia University Bldg.: Kenosha, WI (20,000sf)
- Herzing University Bldg.: Kenosha, WI (22,000sf)
- VA Medical Clinic McHenry: McHenry, IL (10,000sf)
- Cornerstone Commons II: Kenosha, WI (12,200sf)
- Friarswood Annex: Kenosha, WI (5,500sf)
- First American Bank: Kenosha, WI
- Friarswood Campus: Kenosha, WI (17,500sf)
- Friarswood Orchard: Kenosha, WI (9,000sf)
- Century Plaza: Kenosha, WI (22,000sf)
- Goddard School: Kenosha, WI (8,200sf)
- Origin Health Care: Sarasota, FL (20,000sf)
- Kenosha Pointe: Kenosha, WI (10,800sf)
- Layton Square Commercial: Cudahy, WI (4,100sf)
- Theo Trecker: West Allis, WI (108,000sf)
- 2603 W Rawson Ave: Oak Creek, WI (30,000sf)
- Waterstone Mortgage: Pewaukee, WI (55,940sf)



**Luke Samalya**  
Development Analyst

Luke Samalya is a Development Analyst with Bear Development. With extensive experience in affordable housing developments that utilize low-income housing tax credits, market rate housing, student housing, and commercial development, Luke specializes in financial analysis that supports the development process.



**John Hotvedt**  
Vice President of Real Estate Portfolio

John Hotvedt is the Vice President of Real Estate Portfolio for Bear Real Estate Group and family of companies. John has an extensive background in all facets of real estate development and acquisition and leasing dispositions. John provides leadership and oversees the team’s efforts related to acquisition, lease and sale of Bear’s commercial, retail and residential properties, as well as working with the development team on zoning and land use matters.



**Craig Bartsch**  
Project Manager

Craig is a Project Manager with Bear Development. Craig has an extensive background in market rate multifamily, retail and industrial development. As a Project Manager, Craig is responsible for managing the project’s objectives by overseeing the development process from concept through stabilization.

## 3. Team Overview Engberg Anderson Architects

### PARTNERS

Mark Ernst, AIA, LEED AP  
Alex Ramsey, AIA  
Joe Huberty, AIA, LEED AP  
Bill Robison, AIA, LEED AP  
Bill Williams, AIA, LEED AP  
Eric Ponto

### PRINCIPALS

Josie Vega  
Shaun Kelly, AIA  
Timothy Wolosz  
Jim Brown, AIA  
Jeff Hanewall

### STAFF

35 Architects, Designers  
& Interior Designers

### LOCATIONS

#### Milwaukee

320 E Buffalo St, Ste 500  
Milwaukee, WI 53202  
(414) 944-9000

#### Madison

305 W Washington Ave  
Madison, WI 53703  
(608) 250-0100

#### Tucson

2 E Congress, Ste 900  
Tucson, AZ 85701  
(520) 882-6900

#### Chicago

5600 N River Rd, Ste 800  
Rosemont, IL 60018  
(847) 704-1300

### WEBSITE

www.engberganderson.com



### Who We Are

Engberg Anderson, Inc was founded in 1987 and has been an active corporation for 30 years. Our 39 person firm is comprised of six partners and six principals with a professional staff who bring together a depth of diverse architectural, interior design and planning experience. From sensitive historic preservation projects to complex public and private community projects of a highly technical nature, we collaborate with clients to help them achieve their goals with inspired work that supports activities and institutions at the heart of a vibrant community.

### Libraries that Inspire

Connecting people to people, staff, outside experts, fellow citizens — that is the essence of the modern library. These links can be ideas, interaction, content creation, collaboration, education, recreation or inspiration and is fostered by good design. We believe buildings shape behavior. Open, engaging and comfortable buildings with connections to the surrounding neighborhoods increases participation and user satisfaction. Environment and service are connected elements in defining a user's library experience.

### Multifamily Housing

Our portfolio showcases a variety of housing types from multifamily housing to supportive housing or mixed-use developments in urban centers to suburban zones. Each feature a variety of amenities and services unique to that facility and community. Before we draw the first line, we go through a research phase gathering information of the surrounding demographic, the neighborhood, the client and market needs or desires. We want to provide a design that ultimately fulfills the demands of the market.

### Neighborhood Context

Our design expertise responds to the community in which it sustains itself and the current market trends and conditions. We design with community perspective and history in mind along with financial drivers and trends. A neighborhood is one that fosters a sense of community. There are two essential components of a growing neighborhood: walkable streets and reasons to walk. A sense of community requires a juxtaposition of land use including offices, retail, housing, parks, schools and civic buildings, which are integrated into the neighborhood fabric, while the building fronts themselves give the streets life and vitality.



### Mark Ernst

AIA, LEED AP [ **Partner in Charge** ]

Mark is a Partner at Engberg Anderson and a recognized architectural planning and design leader in the Milwaukee area. Accomplished at urban design issues, Mark stays active in the community as a member of Urban Land Institute, Congress for New Urbanism, and on the Wisconsin Green Building Alliance Board. Mark works to create dynamic solutions that serve the community and client.

### Relevant Experience

#### The Standard at East Library, Milwaukee, WI

A new four-story mixed-use building, with a 16,000 sf library on the first floor and three levels of housing.

#### Element 84, West Allis, WI

Mixed-use development that features 209-units of market-rate housing, four-story buildings. Amenities include first level walk ups, private courtyards, swimming pool, fitness room, and a rooftop club room.

#### LightHorse 4041, Shorewood, WI

New 84-unit apartment building with 14,000 sf retail and 200 structured parking spaces; 123,000 sf residential and 101,300 sf parking.

#### Spur 16, Mequon, WI

A mix of retail, multifamily housing and townhomes, and commercial office spaces with eight buildings on the property LEED Certified.

#### The Cornerstone, Shorewood, WI

70,000 sf development offers 25 apartment units on three levels above 11,000 sf of ground floor retail and underground parking.



### Amanada Koch

AIA [ **Architect** | **Project Manager** ]

Amanda enjoys working with clients to determine the best way to achieve their goals for a project while guiding them to a solution that is both functional and aesthetically pleasing. Since joining Engberg Anderson, she has been involved in multiple community charrettes and an international urban planning project. Amanda is an integral member of our design team, having worked on several complex multi-building, mixed-use projects.

### Relevant Experience

#### Racine @ North Beach, Racine, WI

Racine @ North Beach is a multi-phase, mixed-use development bordered by Lake Michigan and Racine's Root River.

#### Harmony @Grandview Commons, Madison, WI

Six residential buildings at two stories each, along with a community clubhouse that will be the central location for resident amenities. Catering to small families, this development will offer 94 apartment homes.

#### Five Fifty Ultra Lofts, Milwaukee, WI

Part of the Milwaukee Bucks Arena District, Five Fifty Ultra Lofts is a mixed-use project that features 112 units and many amenities.

#### Edge of the River, Racine, WI

Multi-phase development on Racine's Root River. The development will house approximately 300 residences in three to seven buildings, including the redevelopment of existing buildings on the site, the construction of two new residential/retail buildings and new riverfront townhomes.



### 3. Team Overview Engberg Anderson Architects



*“Engberg Anderson is a true team player. They are there for you when you need them to be - during design and in the field during construction. I know I can depend on them to be a full partner from beginning to end.”*

**Eric Schmidt**  
CG Schmidt



#### Sarah Ponto

Senior Associate [ Interior Designer ]

Sarah’s award-winning interior design is about balancing cost efficiency and comfort to the living environment. As our senior interior designer, Sarah has had a hand in designing the interiors of the majority of our residential work. Working alongside the architects, our holistic process integrates interiors from the beginning. With a combination of creativity and practicality, Sarah fuses color, texture, lighting, finishes and furniture in inspiring ways, creating unique, aesthetically-pleasing interiors with an emphasis on simplicity, flexibility, sustainability and function.

#### Relevant Experience

##### **Riverheath, Appleton, WI**

A new development that reclaims a brownfield industrial waterfront site. The project combines multi-unit housing, office and retail space into a dense core.

##### **The Cornerstone, Shorewood, WI**

70,000 sf development offers 25 apartment units on three levels above 11,000 sf of ground floor retail and underground parking.

##### **LightHorse 4041, Shorewood, WI**

New 84-unit apartment building with 14,000 sf retail and 200 structured parking spaces; total square footage is 123,000 sf residential and 101,300 sf parking.

##### **Ravenna, Shorewood, WI**

Mixed-use development including 22 condominiums, lower level on-site parking and 7,500 sf of retail space. Site amenities include outdoor seating and a private plaza for retail space and extensive urban landscaping.



#### Nathan Van Zuidam

Architectural Designer

Nathan is an architectural designer at Engberg Anderson and has experience across multiple disciplines including commercial, cultural, financial, and residential design. Nathan has an innate ability to visualize abstract project concepts into a documented aesthetic reality. Nathan holds undergraduate and graduate degrees in architecture from the University of Illinois at Urbana Champaign.

#### Relevant Experience

##### **Stichweld, Milwaukee, WI**

Consists of four separate buildings with green space in between. When completed this development will provide 291 market-rate units, complete with a diverse mix of amenities and parking options

##### **Element 84, West Allis, WI**

Element 84 is a mixed-use development that features 209 units of market rate housing four story buildings. Development amenities include first level walk ups, private courtyards, swimming pool, fitness room, and a rooftop club room with outdoor terrace.

##### **Racine Harborside Master Plan, Racine, WI**

Mixed-use master plan development for Racine Harbor. Includes retail, housing and public amenities, such as a riverwalk

##### **Stoughton Riverfront Redevelopment, Stoughton, WI**

Riverfront redevelopment that includes a mix of housing, retail and commercial spaces.

##### **Harmonee Square, Wauwatosa, WI**

Includes 30 apartments and 7,500 sf of ground floor commercial space



## 4. Team Experience **Bear Development**



### Layton Square

Cudahy, WI

Completed 2016 | \$11 million | 57- units | 4,000 sf retail

Layton Square is an exciting new mixed-use development located in the heart of downtown Cudahy, WI. The development consists of 57 apartment homes and over 4,000 square feet of street-level commercial space. New residents are steps away from Cudahy's developing downtown with a variety of shops, services, restaurants and activities. In addition, the location is close to Lake Michigan and Milwaukee including its vibrant Bay View neighborhood. Layton Square features a combination of one, two and three bedroom units. There are a mix of both affordable and market rate units available for a variety of income levels. The apartments feature fully equipped kitchens with modern finishes and spacious floor plans. Residents can gather and enjoy the luxurious community room or use the fitness center. Bear utilized multiple capital sources including 9% low income housing tax credits "LIHTC", brownfield grants, TIF financing and an AHP grant.



### Residences on Main

Twin Lakes, WI

Completed 2014 | \$6.5 million | 24-units | 3,000 sf retail

Residences on Main is an active senior community consisting of 24 luxury senior apartments in the heart of downtown Twin Lakes, WI. It is ideally located within walking distance of the library, post office, a host of local businesses and the picturesque shores of Lake Mary. The mixed use development consists of market rate and affordable senior units as well as 3,000 square feet of retail. The community includes spacious one and two bedroom units. Vaulted ceilings, quality finishes and Energy Star appliances are standard in every unit. Bear utilized a variety of capital sources including 9% low income housing tax credit "LIHTC", brownfield grants and TIF assistance.



### 5th Avenue Lofts

Kenosha, WI

Completed 2016 | \$10.5 million | 60-units

5th Avenue Lofts is a brand new 60-unit multifamily apartment community in the hear of downtown Kenosha. Located one block off of the beautiful shores of Lake Michigan and right in the center of Kenosha's downtown shops, restaurants and parks. 5th Avenue Lofts has a combination of one, two and three bedroom units. The apartments feature fully equipped kitchens with modern finishes, private balconies and spacious floor plans. Residents can gather and enjoy the luxurious community room and stay fit year round at the fitness center. Bear utilized multiple capital sources including 9% low income housing tax credits "LIHTC", brownfield grants and TIF financing.



### Lofts 2

Kenosha, WI

Completed 2017 | \$6 million | 57- units | 4,000 sf retail

LOFTS 2 is a unique blend of urban design and convenience that awaits you in the heart of downtown Kenosha. The brand new 44 unit second phase of 5th Avenue Lofts, Lofts 2 is located just one block from beautiful Lake Michigan and minutes from the Metra Station. Whether it's dinner out with friends at one of Downtown's trendy new restaurants, catching the local theater group new production, a KingFish minor league baseball game, or taking a stroll thru Kenosha's Farmer's Market, your destination is never far away.



## 4. Team Experience Engberg Anderson Architects



### Riverheath

Appleton, WI

\$25 million | In Construction

Aimed at providing Appleton with a vibrant, interconnected community environment, RiverHeath is a new development reclaiming a dormant industrial waterfront site. The site, comprised of 15 acres along the Fox River at the heart of Appleton, is within walking distance of Lawrence University and College Avenue.

A combination of townhomes, multi-unit housing, retail spaces, walkable spaces and parkland, RiverHeath is a multi-phase project serving as a showcase for sustainable urban development. The USGBC® selected the project to be a LEED-ND® (Neighborhood Development) pilot project, aiming to integrate the principles of smart growth, new urbanism and green building.



### Dwell

Bay View, WI

Completed 2012 | 73,500 sf residential | 26,000 sf parking  
9,000 sf retail | \$9 million

An exciting development in a beloved, trendy neighborhood south of downtown Milwaukee, this project brings a dense, multi-unit housing option to residents of Bay View. Located on a corner of a major thoroughfare and a residential street, the 70-unit building honors the scale and aesthetic of its surroundings. Along the bustling Kinnickinnic Avenue, the first floor hosts multiple retail spaces. Along the neighborhood street, the first floor features walk-up apartment units with patios. Parking is addressed by providing a below grade structure covered with a green roof, creating a park-like courtyard for residents with interior units. The club room, located on the top floor, opens onto another green roof.



### Lighthouse 4041

Shorewood, WI

Completed 2013 | \$35 million | 123,000 sf | 101,300 sf parking  
19,000 sf retail | 84 units

LightHorse 4041 is the newest addition to this charming lakeside village north of Milwaukee. This mixed-use luxury apartment community features 84 apartment units, a 200 vehicle parking structure and 19,000 sf of retail. The exterior design complements its surroundings and enhances the character of this walkable community.

The apartments have condominium-like finishes including all appliances, laundry facilities, walk-in closets, and a patio/balcony. Shared amenities include community green space/patio, clubroom, fitness center, on-site management office and underground parking.



### The Standard

Milwaukee, WI

Completed 2014 | \$15.3 million | 28 Units | 173,100 sf

Engberg Anderson designed a new mixed-use building for the East Library Branch, located within one of Milwaukee's trendiest neighborhoods. To satisfy Milwaukee Public Library's requirements and create a development that would benefit the City, our team designed a 173,100 sf building, with the 16,000 sf library on the first floor and four levels of housing above. The housing provides 70 one bedroom units, 24 two bedroom units and 4 three bedroom units. Parking includes 118 resident parking spaces on the lower level and 38 library patron parking spaces on grade level.

**Recognition** The Daily Reporter Top Projects of 2014 | Milwaukee Business Journal Real Estate Award, 2015 | City of Milwaukee Mayor's Design Award, 2015 | Masonry Award, 2017



## 4. Team Experience **Engberg Anderson Architects**



### **Harmony @Grandview Commons**

Madison, WI

In Construction | 94 units

Located in the Grandview Commons North community on the east side of Madison, WI, the Milky Way development will feature 6 residential buildings at two stories each, along with a community clubhouse that will be the central location for resident amenities. Catering to small families, this development will offer 94 apartment homes.

The greater Madison area is experiencing robust development of residential housing of high priced single occupancy units (studio and one bedroom). In an effort to respond to current market demands, Royal Capital will introduce the aforementioned unit mix into the market for moderate income families making up to 60% of the Dane County median income.



### **Tennyson Senior Living Community**

Madison, WI

In Construction | 192,000 sf

Tennyson Prairie Senior Living Community, which is anticipating construction, is located on the northeast side of Madison, Wisconsin. Envisioned for 300 units in total, the first phase will include 70 independent living apartments and house 50 assisted living residents. The assisted living will be licensed as a CBRF and will have both frail care and memory care.

Community outreach is important to Independent Living, Inc. and the common space for this much needed housing will offer a wellness center, a coffee shop/pub, multi-purpose rooms and well-designed outdoor activity areas.



### **The Cornerstone + Ravenna**

Shorewood, WI

\$15 million | 44-units | 19,000 sf retail

After the owner of a gas station on this key corner in Shorewood defaulted on his loan, WiRED negotiated the purchase of the note. WiRED decommissioned the gas station and developed the site and created a multiple award-winning mixed-use building featuring approximately 11,300 square feet of retail and 24 luxury apartments. The development received the Public Policy Forum's Best Public/Private Partnership award. The development required Tax Increment Financing and WiRED negotiated the detachment of a parcel from one municipality so the adjoining municipality could attach the parcel in order to incorporate it into an existing TID.

**Recognition** Milwaukee Business Journal Real Estate Awards, Best Public/Private Partnership, 2011



### **Spur 16**

Mequon, WI

In Construction | Est. Cost \$35 million 159 units | 22,000 sf retail

Adjacent to Mequon's City Hall, Library and the Interurban Bike Trail, the city envisioned a program and master plan for a town center that would complement these adjacent uses in an effort to create a more integrated destination for the community. The development features a mix of retail, multifamily housing and townhomes, and public spaces. The residential development will include a clubhouse with fitness center and pool as well as pedestrian friendly access to the retail spaces. One such possible retail use could be a public market. Aesthetically, the project features the reuse of three existing buildings to retain Mequon's historical charm.



## 4. Team Experience References



**Brian Biernat**

Director of Economic Development, City of Cudahy  
Layton Square

(414) 769-2215

5050 S. Lake Drive  
Cudahy, WI 53110



**Mark Geall**

President, Tanesay Development  
Riverheath Appleton

mgeall@tanesay.com  
(303) 906-4328

201 South RiverHeath Way, Suite 1800  
Appleton, WI 54915

**Jennifer Frederick**

Village Administrator, Village of Twin Lakes  
Residences on Main

frederick@twinlakeswi.net  
(262) 877-2858

108 E Main St.  
Twin Lakes, WI

**Kevin Newell**

President, Royal Capital Group LLC  
Harmony @ Grandview Commons

k.newell@royalcapital.net  
(414) 847-6275

710 N Plankinton Ave, Suite 300  
Milwaukee, WI 53203

**Katherine Rist**

Partner, Foley & Lardner  
5th Avenue Lofts and LOFTS 2

krist@foley.com  
(608) 258-4317

150 East Gilman Street Suite 5000  
Madison, WI 53703

**Bob Monnat**

Partner + COO, Mandel Group  
LightHorse 4041

rbmonnat@mandelgroup.com  
(414) 347-3600

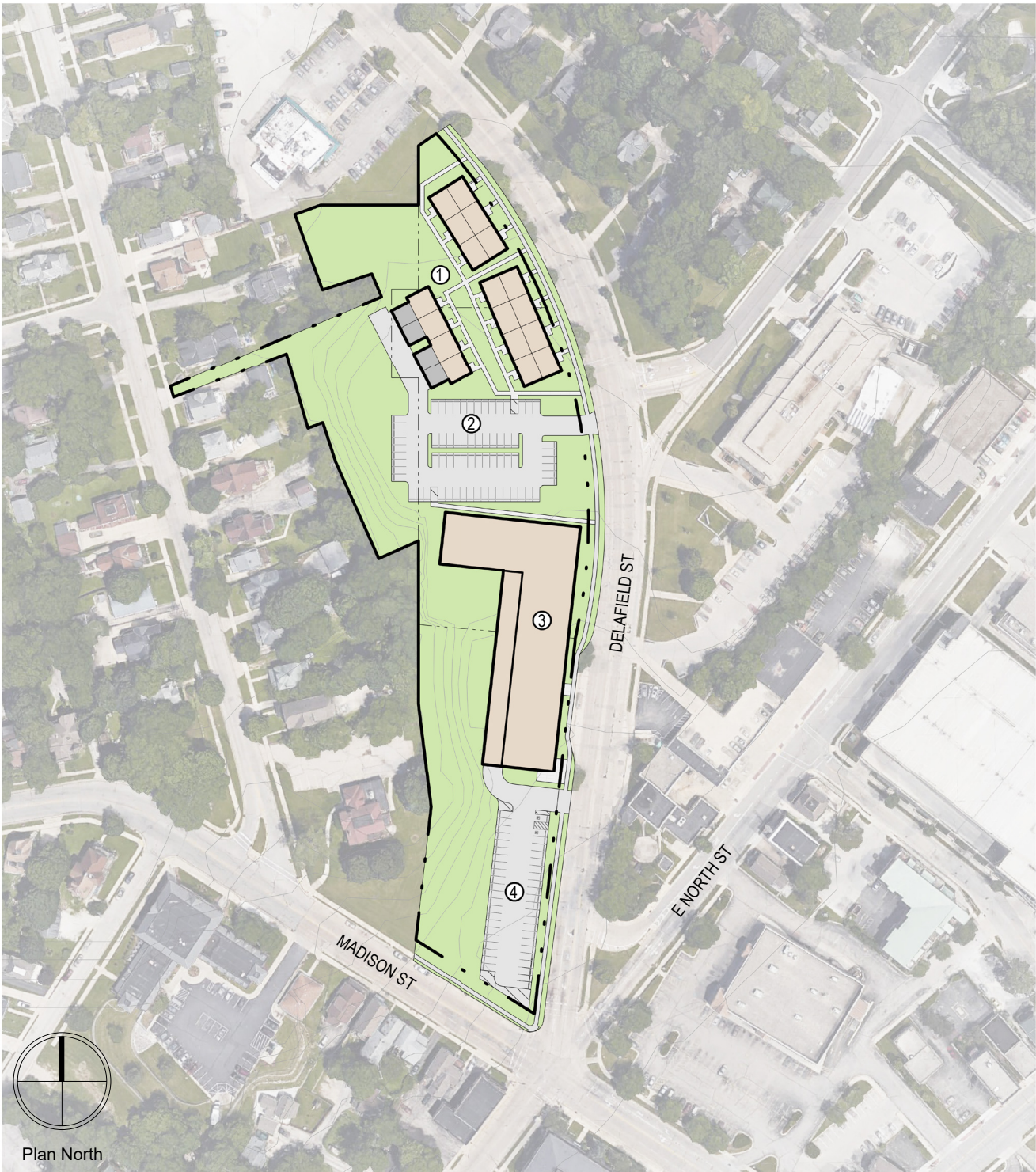
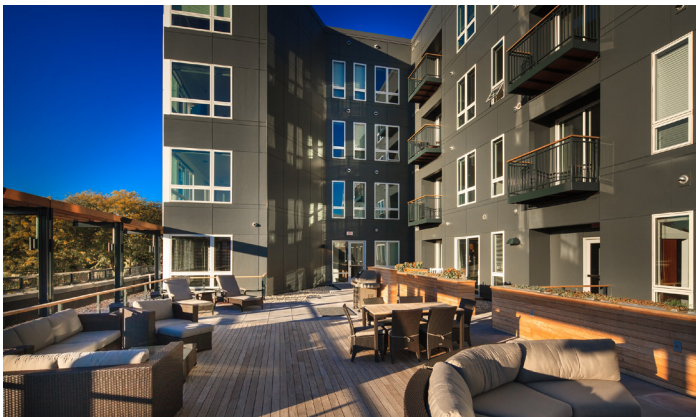
330 E Kilbourn Ave  
Milwaukee, WI 53202



5. Design | Site Plan



Building  
Community

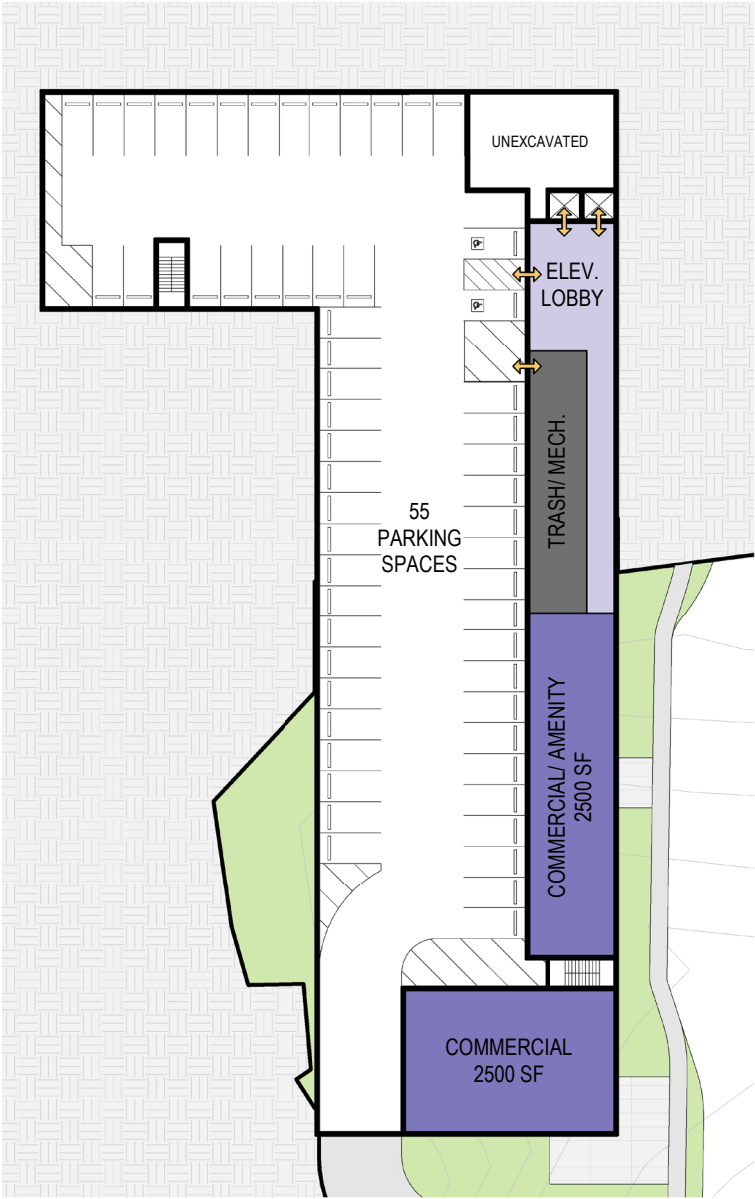


LEGEND	
①	TWO-STORY TOWNHOMES (18 UNITS)
②	SURFACE PARKING (75 SPACES)
③	FOUR-STORY MIXED-USE BUILDING (69 UNITS + 5,000 SF COMMERCIAL/AMENITY)
④	SURFACE PARKING (45 SPACES)

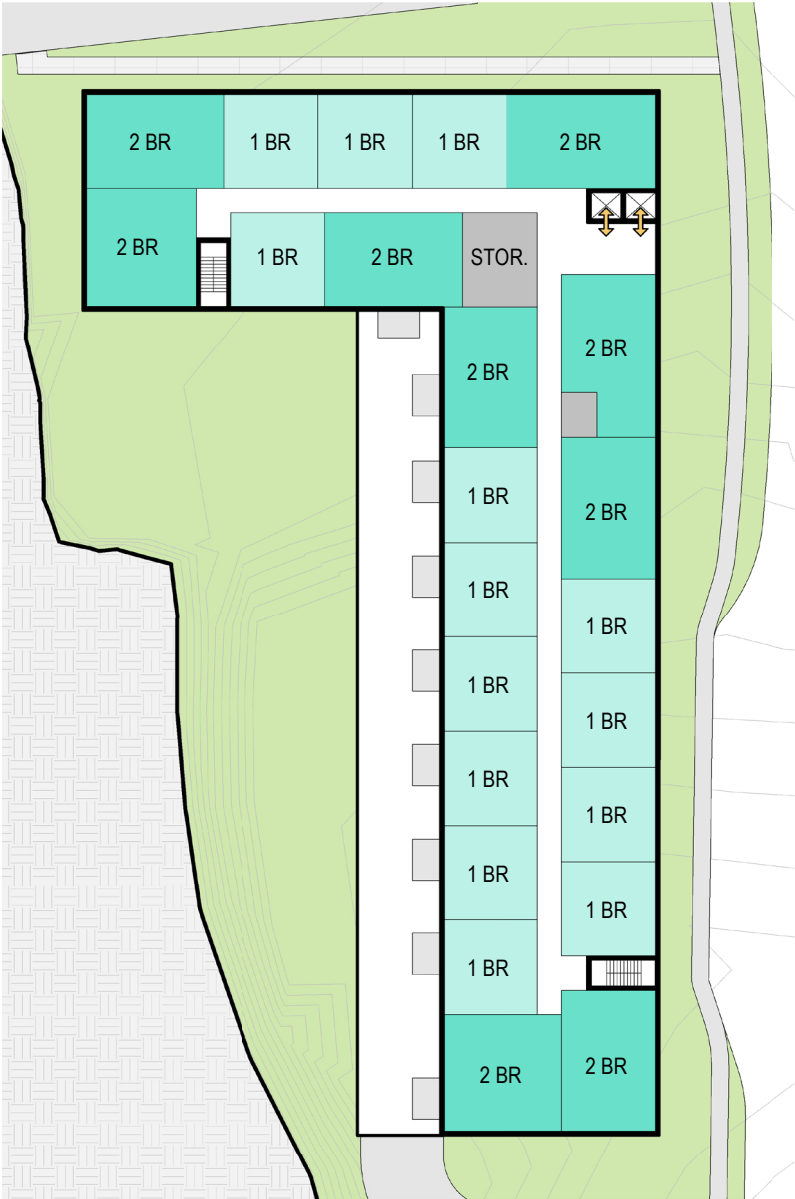
PROJECT DATA	
<u>UNIT COUNT:</u>	
4-STORY MIXED-USE BUILDING:	
(42)	ONE BEDROOM UNITS
(27)	TWO BEDROOM UNITS
(69)	TOTAL UNITS
2-STORY TOWNHOMES:	
(18)	THREE BEDROOM UNITS
(87)	TOTAL UNITS ON SITE
<u>PARKING COUNT:</u>	
(55)	INDOOR SPACES
(120)	SURFACE SPACES
(8)	GARAGE SPACES (TOWNHOMES)
(183)	TOTAL PARKING ON SITE
<u>BUILDING AREA:</u>	
4-STORY MIXED-USE BUILDING:	
LEVEL ONE	31,900 SF (5,000 SF COMMERCIAL/AMENITY)
LEVELS 2-4	26,100 SF
TOTAL	110,200 SF
<u>TOWNHOMES:</u>	
LEVEL ONE	18,150 SF
LEVEL TWO	15,850 SF
TOTAL	34,000 SF



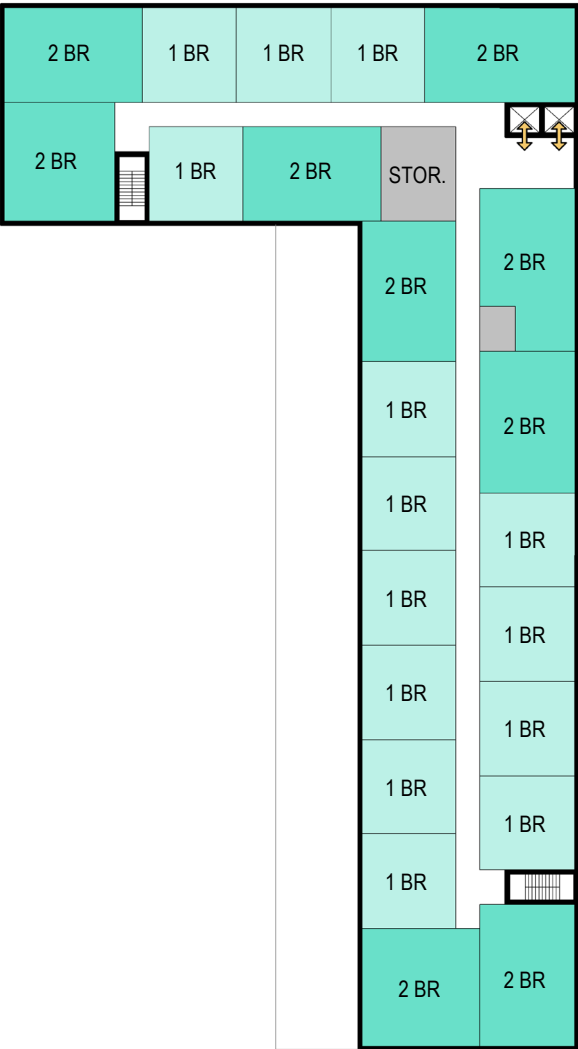
5. Design | Floor Plans



LEVEL ONE PLAN



LEVEL TWO PLAN



LEVEL THREE & FOUR PLAN





5. Design





# 5. Design









## 6. Fiscal Impact + Project Timeline

### Fiscal Impact [ Budget Breakdown ]

Based on the RFP and our understanding of the scope of the project we have estimated the following budget for Waukesha.

#### Estimated Costs:

Senior Building & Family Townhomes: \$18MM

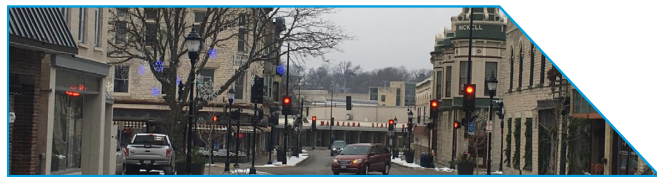
### Project Timeline

The following is a proposed timeline. Our team is flexible on the dates outlined below and would look to the city for guidance on specifics.

- Successful RFP Recipient Chosen (April 2019)
- 1 [ Master Site Plan Development ] (May - August 2019)
- 2 [ Residential Market Study ] (September 2019)
- 3 [ Preliminary Design ] (October – December 2019)
- City Entitlements & Approvals (April – July 2020)
- 4 [ Secure Funding Sources ] (October 2019 – December 2020)
  - Tax Incremental Financing Application (October 2019)
- 5 [ Construction Documents ] (August 2020 – December 2020)
- 6 [ Implementation ] (July 2021 – November 2022)
  - Bidding (January – March 2021)
  - Construction (April 2021 – May 2022)
  - Residential Occupancy (June 2022)

## 7. Selection Criteria

*"A high percentage, 46%, believe the City needs a little more senior housing."*



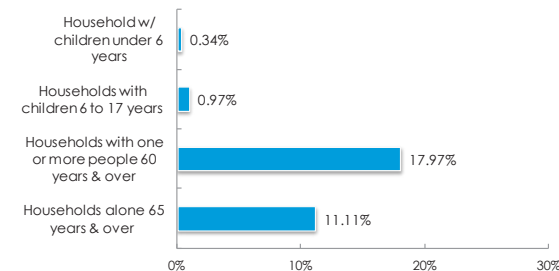
### Housing Study and Needs Assessment

City of Waukesha  
January 2019



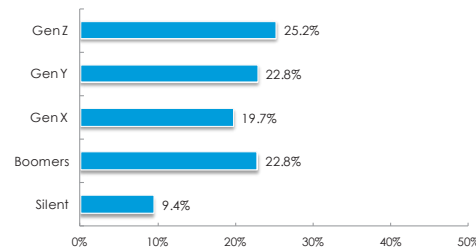
vierbicher  
planners | engineers | advisors

Figure 2.2 Households by Age Percent Change 2010-2015



Source: 2010 & 2015 ACS

Figure 1.3 Percentage of Population by Generation



Source: ESRI, US Census, Vierbicher

For the City's convenience we have outlined our explanation of our proposal's satisfaction of the selection criteria outlined in the RFP.

Criteria	Explanation
<b>Firm experience and capacity to complete project</b>	With a dedicated and experienced development team, Bear is well positioned to undertake this development. Over the past 9 years, our firm has built <b>over 2,500 multifamily units with total development costs exceeding \$450MM.</b>
<b>Developer track record, experience, and ability to complete project</b>	<b>With more than 33 years of experience</b> in successfully partnering with municipalities on a variety of development projects, we are confident in our proven ability to deliver realistic proposals and projects that are completed on time and on budget.
<b>Fiscal Impact</b>	The current tax base of this site is zero. Our development will increase this base and add community and fiscal value
<b>Design</b>	The physical design of this site will emphasize the importance of the site's location at the <b>gateway to downtown.</b> Our project will be differentiated by the unique proposal of the multi-generational housing structure, the allocation of a dedicated design team, and the focused use of high-quality materials.
<b>Addresses specific housing supply deficit</b>	Senior housing has been identified as a need by the previous housing study. By addressing this gap with a multi-generational structure, we believe we are providing additional value for both prospective residents and the community of Waukesha.
<b>Full Utilization of All Available Sites</b>	Our functional design of the sites fully utilizes the available area.