



## OFFICIAL NOTICE AND AGENDA

of a meeting of a City Board, Commission, Department, Committee, Agency, Corporation, Quasi-Municipal Corporation, or sub-unit thereof.

**Meeting:** ECONOMIC DEVELOPMENT COMMITTEE  
**Date/Time:** Tuesday, February 6, 2018 at 5:15 p.m.  
**Location:** Council Chambers, 1st Floor, City Hall  
**Members:** Tom Neal (C), Romey Wagner, Pat Peckham, Joe Gehin (VC) and Lisa Rasmussen

### **AGENDA ITEMS FOR CONSIDERATION (All items listed may be acted upon)**

Public comments relating to an agenda item will be allowed when the specific item is considered

- 1 Approval of the Minutes from 1/9/18 and 1/18/18
- 2 Update on the Riverlife Project
- 3 Discussion and Possible Action on the Grand Avenue RFP Responses
- 4 Discussion and Possible Action on the Thomas Street Remnants RFP Responses
- 5 **CLOSED SESSION** pursuant to 19.85(1)(e) of the Wisconsin Statutes for deliberating or negotiating the purchase of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session
  - Discussion and Possible Action on the Grand Avenue RFP Responses
  - Discussion and Possible Action on the Thomas Street Remnants RFP Responses
- 6 **RECONVENE** into Open Session to Take Action on Closed Session Items, If Necessary
- 7 Discussion and Possible Action on the Release of an RFP for an Update of the City of Wausau's Zoning Ordinance - Title 23 of the Wausau Municipal Code
- 8 Update on the Journal of Tax Credits Article about MetroPlains Wausau Projects
- 9 Update on the Wausau Center Mall
- 10 Discussion and Possible Action on Future February Meeting Dates

Adjournment  
Tom Neal (Chair)

**This notice was posted at City Hall and emailed to the media on 2/1/18**

It is likely that members of other committees of the Common Council of the City of Wausau, and possibly a quorum of the Council members, will be in attendance at the above-mentioned meetings to gather information. **No action will be taken by any such groups.**

Please note that, upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids & services. For information or to request this service, contact the City Clerk at (715) 261-6620.

Other Distribution: Media, Alderpersons, Mayor, City Departments

**JOINT FINANCE AND ECONOMIC DEVELOPMENT COMMITTEES**

Date and Time: Tuesday, January 9, 2018 @ 6:30 pm., Council Chambers

**Finance Members Present:** Rasmussen (C), Smith, Gehin, Kellbach, Nutting

**Economic Development Members Present:** Neal (C), Gehin, Peckham, Rasmussen

Members Excused: Wagner (ED)

Others Present: Groat, Jacobson, Kujawa, Schock, Lindman, Mielke, Vanderboom, Rayala, McElhane, Gisselman, and other interested parties

In accordance with Chapter 19, Wisc. Statutes, notice of this meeting was posted and sent to the Daily Herald in the proper manner. The Finance Committee meeting was called to order by Chairperson Rasmussen and the Economic Development Committee was called to order by Chairperson Neal at 6:30 pm.

FINANCE ONLY ITEMS

**Minutes of previous meeting(s) (12/12/17)**

Motion by Gehin, second by Kellbach to approve the minutes of the previous meetings on 12/12/17. Motion carried 5-0.

**Discussion and possible action approving Assistance to Firefighters Grant application in the amount estimated at \$80,000 for the purchase of equipment and software. The City of Wausau estimated match obligation is \$8,000 – Kujawa**

Rasmussen indicated the city has applied for this grant in the past. Smith questioned if the \$8,000 has been budgeted. Kujawa stated she did not put it in her operational budget and did not know for sure if they would receive the grant or which operational year it would actually be approved in, but the city has found the funds for the grant in the past. She reiterated it is only potential and they usually have three times as many applicants as they have funds, but we have been fortunate enough to receive it the last two out of three years.

Motion by Smith, second by Gehin to approve the AFG application. Motion carried 5-0.

JOINT ITEM WITH ECONOMIC DEVELOPMENT COMMITTEE

**Discussion and possible action on the potential sale of land in the Wausau Business Campus (9916 Highland Drive) to Scannell Properties LLC**

Schock explained this is a proposal from a national warehousing firm, Scannell Properties, for a distribution center. It would be a fairly major building in the Business Campus expansion area, with approximately a \$10 million construction value. He indicated based on previous discussion at ED Committee, we negotiated a process to sell land to provide a one year reverse TIF for project improvements at the site, not to exceed \$200,000.

Neal commented the footprint of this proposed project is for a piece of land that is well suited for this and may not be well suited for a lot of other things, so it is a good fit. *Discussion followed.*

*Finance Committee:*

Motion by Nutting, second by Gehin to approve the sale of land (9916 Highland Drive) to Scannell Properties, LLC. Motion carried 5-0.

*Economic Development Committee:*

Motion by Gehin, second by Peckham to approve the sale of land (9916 Highland Drive) to Scannell Properties, LLC. Motion carried 4-0.

Rasmussen stated there would be no need for closed session.

**Adjournment**

Motion by Nutting, second by Kellbach to adjourn the Finance Committee meeting. Motion carried unanimously. Motion by Peckham, second by Gehin to adjourn the Economic Development Committee meeting. Motion carried unanimously. Committees adjourned the joint meeting at 6:39 pm.

## **ECONOMIC DEVELOPMENT COMMITTEE**

Date and Time: Thursday, January 18, 2018 @ 5:30 pm., Council Chambers

**Economic Development Members Present:** Neal (C), Rasmussen, Gehin, Wagner & Peckham.  
Others Present: Schock, Mielke, Jacobson & Plaisance.  
Other Council Members Present: Gisselman, Smith and Kellbach

In accordance with Chapter 19, Wisc. Statutes, notice of this meeting was posted and sent to the Daily Herald in the proper manner.

The Economic Development Committee meeting was called to order by Chairperson Neal at 5:30 pm.

### **Approval of Minutes from 11/16/17, 12/5/17 and 12/21/17**

*Motion by Gehin, second by Peckham to approve all minutes. Motion passed 5-0.*

### **Discussion and Possible Action on Redevelopment Options Related to a Proposed Cinema Theater and developer Partners at 411 Washington Street (Sears)**

***CLOSED SESSION pursuant to 19.85(1)( e) of the Wisconsin Statutes for deliberating or negotiating the purchase of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session:***

**➔ Discussion and Possible Action on Redevelopment Options Related to a Proposed Cinema Theater and developer Partners at 411 Washington Street (Sears)**

**ROLL CALL VOTE – Neal, Peckham, Rasmussen, Wagner and Gehin.**

*Motion made by Rasmussen, second by Wagner to go into a closed session. Motion passed 5-0.*

*Motion made by Peckham, second by Gehin to go back into Open Session. Motion passed 5-0.*

### **RECONVENE INTO OPEN SESSION, if necessary**

Wagner stated that after receiving a proposal from Compass Properties for the cinema development of the Sears property he moves to direct city staff to work with them to bring the Council a formal proposal.

*Motion made by Wagner, second by Peckham. Motion passed 5-0.*

### **Discussion and Possible Action on the Phase 2 Proposals for the City of Wausau Marketing and Awareness Project**

Neal stated that after receiving additional follow up information from the RFP respondents there are two proposals to decide on.

***CLOSED SESSION pursuant to 19.85(1)( e) of the Wisconsin Statutes for deliberating or negotiating the purchase of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session:***

**➔ Discussion and Possible Action on the Phase 2 Proposals for the City of Wausau Marketing and Awareness Project**

**ROLL CALL VOTE – Neal, Peckham, Rasmussen, Wagner and Gehin.**

*Motion made by Rasmussen, second by Wagner to go into a closed session. Motion passed 5-0.*

*Motion made by Peckham, second by Gehin to go back into Open Session. Motion passed 5-0.*

## **RECONVENE INTO OPEN SESSION, if necessary**

Neal thanked the responding agencies that came back after the initial responses. After discussion in closed session the committee was happy with the results from both respondents.

Rasmussen made the motion to accept the proposal from Aplomb PR and Neal added that their proposal was very on-point, had good detail and a substantial achievement. He thought it was a good starting point and suggested the possible potential for a synergy with the other business that sent in their responding proposal for asset development and cost effective messaging.

*Motion made by Rasmussen, second by Gehin. Motion passed 5-0.*

### **Discussion and Possible Action on Item#2 of the Third Amendment to the Development Agreement for the Property at 1300 River Drive.**

Schock presented that the WOW's (Wausau on Water) development agreement included the mural discussion and production and was recently taken to the Planning Committee to be heavily debated. The plan was formerly approved by the Planning Committee but not the Council. This subject was brought to the ED Committee to discuss the next steps, including whether or not a new Public Arts Commission should be created by Council.

Rasmussen talked about the history of the project and mentioned that this was the first project completed on the Riverfront. The murals were presented on the original design plan and were supposed to sell the uniqueness of the project. She explained that government has oversight on what is being done and this was project was originally approved by the ED Committee, so she felt that it should stay with the ED Committee and be delivered on as promised. Peckham agreed that the Planning Committee didn't have the background of this project to be making specific decisions.

Peckham agreed that the murals are an artistic enhancement and brought up that WOW's thoughts were that they used local photos inside and they didn't want to repeat them outside, but he agrees that we expected more and we need to be open-minded.

Wagner stated that he would not have agreed on a metal building if this was going to be the outcome and suggested that they work with the historical society.

Neal agrees and wants the process to move forward, while Gehin thinks that Mr. Greenwood should be at the next meeting to continue the dialogue. Schock thinks we should tell him that he needs to present renderings at the next meeting and Rasmussen agrees that he can present alternative plans but a compromise needs to be worked out and followed up on.

*No action taken.*

### **Special Instructions or Directives to Staff:**

*None*

*Motion by Peckham, second by Gehin to adjourn the meeting. Motion passed 5-0.*

Adjournment Time: 7:05 p.m.

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Office of the Mayor  
Robert B. Mielke



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TEL: (715) 261-6800  
FAX: (715) 261-6808

December 5, 2017

Dear Interested Parties,

The City of Wausau is pleased to release a **Cooperative Request for Proposal (Cooperative RFP)** with the landowners at 2220-2222 and 2202 Grand Avenue. These prime retail lots along the busy Grand Avenue (Business 51) corridor constitute 0.42 and 0.37 acre parcels (which may potentially be combined). The parcels contain existing buildings which are approximately 4700 square feet and 3740 square feet respectively which could be reused or demolished. Current zoning is Business- B2.

The City's Cooperative RFP process allows owners to review informal offers to purchase or development proposals cooperatively to allow the properties to be viewed in their entirety for development purposes. Land owners reserve the right to rank and select, or reject, any or parts of a proposal.

Proposals must include 1. proposed property purchase price offered; 2. estimated proposed construction value; 3. estimated taxable value; 4. architectural renderings and/or examples of the proposed construction; 5. any request for city participation.

Event	Date
1. RFP Released	December 5, 2017
2. Proposals Due	February 2, 2018

Questions and/or additional information on this RFP and private tours of the existing buildings are available upon request. Please contact:

Christian Schock – Planning, Community & Economic Development, [christian.schock@ci.wausau.wi.us](mailto:christian.schock@ci.wausau.wi.us)

Sincerely,

Robert B. Mielke  
Mayor

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407 Grant Street – Wausau, WI 54403

## Background

The City of Wausau and landowners are pleased to solicit proposals for the potential redevelopment of adjacent, existing vacant commercial properties at 2220-2222 and 2202 Grand Ave. (located between Kent Street and Eau Claire Blvd. on the City's prime Southeast Side.



## Proposal Format and Required Information

1. **Project Deliverables:** Detail a specific project for all or part of the redevelopment area with a specific offer to purchase price, include descriptions of the types of reports and assumptions utilized to justify the project and provide information on predicted vulnerabilities as they might apply to the project.
2. **Project Management:** Include biographies and relevant experience of key staff and management personnel. Describe the qualifications and relevant experience of the types of staff that would be assigned to this project. Describe the company's bonding process and coverage levels of employees.
3. **Level of Investment and Financial Viability:** Include a project construction budget, the status of their organization (whether a corporation, a non-profit or charitable institution, a partnership, a limited liability corporation, a business association, joint venture, or other) indicating under which laws it is organized and operating and include a brief financial history. The developer shall also provide a statement regarding any debarments, suspensions, bankruptcies and/or loan defaults.
4. **Successful Examples:** Include detailed descriptions and photos of other redevelopment projects completed by your firm and/or partners.
5. **Organizational Overview:** Provide the following information about your company:  
Official registered name (Corporate, D.B.A., Partnership, etc.), address, main telephone number, toll-free numbers, and facsimile numbers. Person authorized to contractually bind the organization for any proposal against this RFP. Brief history, including year established and number of years your development team has taken on similar projects.
6. **Scope:** Propose a project implementation timeline and performance standards for the construction work to be completed.

## Costs of Proposal

Any costs incurred in the development of the Response to this Request for Proposals are borne by the Developer. The City of Wausau is not responsible for any costs incurred by the Developer in formulating a response, or any other costs incurred such as mailing expenses.

## Evaluation Criteria

Weighting of criteria is used by the City and cooperating land owners (Owners) as a tool in selecting the best proposal. The Owners or City may change criteria and criteria weights at any time. Evaluation scores or ranks do not create any right in or expectation of a contract award. Proposals will be evaluated on the accuracy and responsiveness of the developer. Background checks and references will also be considered.

Evaluation of Proposals will be based upon the quality of response, the proposed developers background and proposed investment.

The following elements will be the primary considerations in evaluating all submitted proposals and in the selection of a Developer (out of a total of 100):

- *Proposal maximizes land sale value to the owners. (50 Points)*
- *Proposal maximizes taxable value to the City. (30 Points)*
- *Proposal offers a use or mix of uses which complements the area. (10 Points)*
- *Availability of high-quality design personnel and contractors to complete the project. (10 Points)*

To be selected, a developer must be able to comply with the general requirements outlined in this document and with any other applicable laws and requirements.

Proposals shall meet the following criteria:

1. Proposals shall be prepared on standard 8 1/2" X 11" letter-size paper;
2. Email digital copy of proposal to [christian.schock@ci.wausau.wi.us](mailto:christian.schock@ci.wausau.wi.us)

The City and Owners reserve the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential developer,
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers, and
- Award more than one right to develop.
- Negotiate the nature and scope of the project before final Committee and Council approval of a term sheet.

Developer's proposal in response to this RFP may be incorporated into the final Development Agreement between the City of Wausau and the Developer and the selected vendor(s) of the Developer.

Send proposals by 4:30 p.m. on February 2, 2018 to the attention of:

Planning, Community & Economic Development  
407 Grant Street  
Wausau, WI 54403-4783  
Phone: 715-261-6683  
[christian.schock@ci.wausau.wi.us](mailto:christian.schock@ci.wausau.wi.us)

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Office of the Mayor  
Robert B. Mielke



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TEL: (715) 261-6800  
FAX: (715) 261-6808

December 5, 2017

Dear Interested Parties,

The City of Wausau is pleased to release a **Request for Proposal (RFP)** for remnant parcels along the newly completed **Thomas Street Phase 1 Redevelopment Area**. Proposals may be made for one or a combination of the 24 developable remnant parcels and may be combined with adjacent private properties.

Proposals must include: identified parcel(s) by number; proposed purchase price offered; proposed use; estimated proposed construction value; any request for city participation.

Event	Date
1. RFP Released	December 5, 2017
2. Proposals Due	February 2, 2018
3. Proposals Review	February 6, 2018

Questions and/or additional information on this RFP and private tours of the existing buildings are available upon request. Please contact:

Christian Schock – Planning, Community & Economic Development, [christian.schock@ci.wausau.wi.us](mailto:christian.schock@ci.wausau.wi.us)

Sincerely,

Robert B. Mielke  
Mayor

## Proposal Format and Required Information

This is a streamlined RFP process, interested parties must submit a letter or email which should include the following information:

1. Interested Proposer/Name and Address, Telephone and Email
2. Parcel(s) by number from the enclosed Remnant Parcels (yellow) map
3. Proposed purchase price offered
4. Proposed use of the parcel(s)
5. Estimated construction value (if construction is proposed)
6. Any request for city participation

## Evaluation Criteria

The Economic Development Committee shall evaluate and consider proposals based upon the quality of response, proposed use and projected investment. To be selected, a proposer must be able to comply with general City land purchase requirements and any other applicable laws and requirements.

The City reserves the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability;
- Accept or sell land on offers received, without discussions or requests for best and final offers;
- Accept more than one right to develop;
- Negotiate the nature and scope of any proposed project before final Committee and Council approval;
- Accept no proposal and re-RFP or bid properties again in the future.

Send proposals by 4:30 p.m. on February 2, 2018 to the attention of:

Planning, Community & Economic Development

407 Grant Street

Wausau, WI 54403-4783

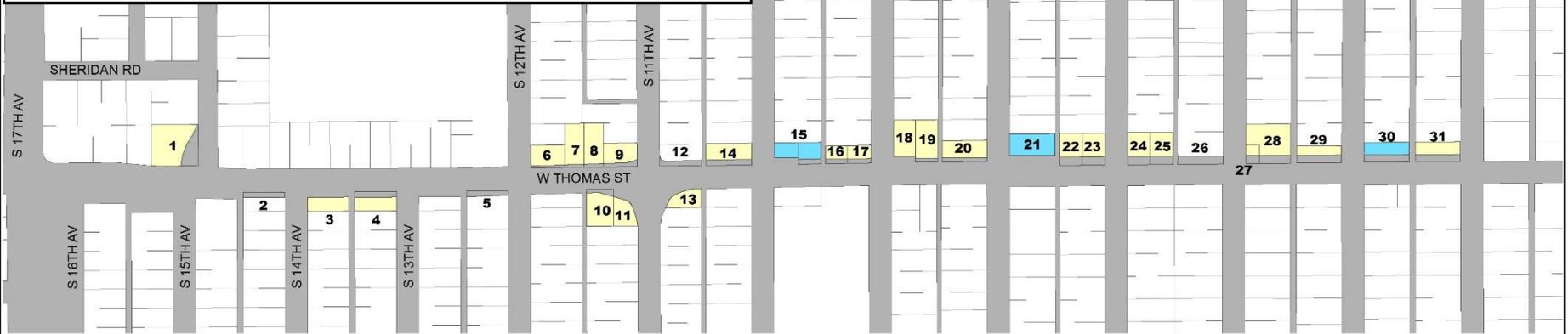
Phone: 715-261-6683

[christian.schock@ci.wausau.wi.us](mailto:christian.schock@ci.wausau.wi.us)



An illustration of potential infill buildings from the Thomas Street Master Plan (2014)

Label	PIN	GIS Sq Ft	Aprx Dimensions (ft)			
			Width (North Side)	Width (South Side)	Length (East Side)	Length (West Side)
1	29129073440080	10526	121	79	109	107
3	29129073440188	4037	110	110	37	37
4	29129073440170	3971	110	110	36	36
6	29129073530985	4918	92	92	53	54
7	29129073530986	5464	50	50	109	110
8	29129073530987	5417	50	50	108	109
9	29129073530988	4589	90	90	42	53
10	29129073530324	6265	73	73	78	89
11	29129073530325	3793		63		78
13	29129073530385	3686		94		49
14	29129073530312	5179	121	121	43	43
15 (East)	29129073530290	2646	60	60	44	44
15 (West)	29129073530291	2509	64	64	40	39
16	29129073530289	1971	57	57	35	34
17	29129073530288	2205	63	63	35	35
18	29129073530345	5554	58	58	96	96
19	29129073530344	6097	60	60	102	101
20	29129073530343	5418	118	118	46	46
21	29129073530141	6893	120	120	57	57
22	29129073530140	3759	60	60	63	63
23	29129073530139	3793	60	60	63	63
24	29129073530164	3792	60	60	63	63
25	29129073530163	3830	60	60	64	63
27	29129073530052	1027	35	35	29	29
28	29129073530051	9014	119	84	85	55
29	29129073530050	2966	119	119	25	25
30	29129073530072	3950	119	119	33	33
31	29129073530071	4012	119	119	34	33



NOTES:  
 1. DUPLICATION OF THIS MAP IS PROHIBITED WITHOUT THE WRITTEN CONSENT OF THE CITY OF WAUSAU ENGINEERING DEPT.  
 2. THIS MAP WAS COMPILED AND DEVELOPED BY THE CITY OF WAUSAU AND DANE COUNTY GIS. THE CITY AND COUNTY ASSUME NO RESPONSIBILITY FOR THE ACCURACY OF THE INFORMATION CONTAINED HEREIN.  
 3. MAP FEATURES DEVELOPED FROM APRIL 2010 AERIAL PHOTOGRAPHY.

**Legend**

- ROW
- Stormwater
- City Owned Parcels

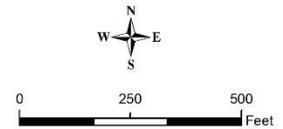
## Thomas Street - Phase I

City of Wausau

**DRAFT**

**DRAFT**

Date: December 06, 2017





## **REQUEST FOR PROPOSALS**

### **ZONING CODE UPDATE**

#### **GENERAL INFORMATION**

This Request for Proposals (RFP) seeks a qualified firm to conduct a major update to the city's zoning code – Chapter 23 of the Wausau Municipal Code.

The existing zoning code was adopted in 1967, but has undergone periodic updates since then. The proposed scope of work is to overhaul the zoning code – basing it on the city's most recent Comprehensive Plan (2017).

The current zoning code is a typical Euclidian code, with emphasis on separation of land uses and controlling density. The update to the zoning code would take an in depth analysis of the code and modernize it to fit the goals and objectives of the city's comprehensive plan.

Some overarching goals for the update to the zoning code are to:

- Make the code easier to administer
- Allow for greater flexibility in urban infill development
- Introduce form-based concepts in certain areas
- Integrate the city's urban design standards into the zoning code
- Allow for a greater mix of compatible land uses

Particular topic areas to address in the update include, but are not limited to:

- Sign zoning – bring regulations up to date with most recent case law
- Off-street parking – explore modern concepts such as reducing minimums, introducing maximums, and the inclusion of bicycle parking
- Subdivision ordinance – integrate with zoning ordinance
- Landscaping and green infrastructure – adopt more progressive regulations
- Permitted and conditional uses – update and simplify

#### **SCOPE OF WORK**

The consultant will be expected to work closely with city staff on a public process for implementing a new zoning code. This will involve facilitation of public meetings in addition to working meetings with city staff and/or key stakeholders. The exact number of meetings, as well as deliverables, timelines, etc. will be developed with city staff and may be altered during the process.

The overall scope of work, at a minimum, is anticipated to include the following:

- Thorough review of current zoning and related ordinances
- Development of enforceable zoning regulations in relation to the city's comprehensive plan

- Public involvement including in-person meetings, city committees, and online outreach
- Draft documents, including the new zoning code, plus supporting documents such as a summary of amendments
- Legal consultation for new regulations
- Generation of final draft code, maps, graphics, and supporting documents
- Assistance with adoption of final code through city committees and Common Council

**BUDGET**

Consultants should provide a total cost to prepare the zoning code including hourly rates and estimated number of hours to complete the project. All expenses associated with the project including all travel and incidental costs should not exceed \$90,000.

**REQUEST FOR PROPOSAL PROCESS**

This RFP seeks the submission of proposals to provide services from any and all interested and qualified consultants. The city of Wausau seeks, by way of this RFP, to obtain services in a manner that maximizes the quality of services while also maximizing value to the City. Consultants must be able to show they are capable of performing the services requested. Such evidence includes, but is not limited to, the respondent's demonstrated competency and experience in delivering services of a similar scope and type, and the local availability of the consultant's personnel.

The RFP response must be submitted electronically to [brad.lenz@ci.wausau.wi.us](mailto:brad.lenz@ci.wausau.wi.us) by 4:00 p.m. Central Standard Time on **March 9, 2018**.

All responses must be received by the stated date and time in order to be considered for award. The City will not be responsible for and may not accept late proposals due to slow internet connection or for any other electronic failure (including, but not limited to, information transmission and internet connectivity failures).

By submitting a proposal, each consultant certifies that its submission is not the result of collusion or any other activity which would tend to directly or indirectly influence the selection process. The proposal will be used to determine the consultant's capability of rendering the services to be provided. The failure of a consultant to comply fully with the instructions in this RFP may eliminate its proposal from further evaluation as determined in the sole discretion of the City. The City reserves the right to evaluate the contents of proposals submitted in response to this RFP and to select a consultant, if any.

Proposals received late will not be opened or given any consideration for the proposed services unless doing so is deemed to be in the best interest of the City.

**TENTATIVE SCHEDULE OF EVENTS**

EVENT	DATE
Release Request for Proposals	February 9, 2018
Proposal deadline	March 9, 2018
Contractor selection by City Plan Commission	March 20, 2018

Execute contractor agreement /project start	April 2018
Final draft and ordinance adoption	July 2019

**PROPOSAL SUBMISSION REQUIREMENTS**

All proposals should adhere to the specified content and sequence of information described by this RFP.

Submit one (1) complete electronic (PDF, Microsoft Word document, etc.) version of your proposal and any required attachments to the City electronically to Brad.Lenz@ci.wausau.wi.us.

**COVER LETTER**

Provide a one-page cover letter on your letterhead that includes the address, telephone number, and e-mail address of the contact person(s). List the name and title of each person authorized to represent the consultant in negotiations.

Unless the consultant is an individual, all proposals must be signed with a firm/company/partnership/entity name and by a responsible officer or employee indicating that officer or employee’s authorization to commit the consultant to the terms of the proposal. Obligations assumed by such signature must be fulfilled.

**SPECIFIED CONTENT AND SEQUENCE OF INFORMATION IN THE RFP**

Each proposal should include sections addressing the following information in the order shown in the following section. The consultant should be sure to include all information that it feels will enable the evaluation committee and, ultimately, the City to make a decision. Failure of the consultant to provide specific, detailed information may result in its proposal being rejected in favor of a sufficiently-detailed proposal. Any necessary exhibits or other information, including information not specifically requested by this RFP but that you feel would be helpful, should be attached to the end of the proposal.

**Qualifications and Experience:**

- Provide a statement of qualifications for your organization, a statement of the size of firm, a description of services provided by your organization, and a statement of the extent of experience/history providing the services requested by this RFP.
- How many full time employees (FTEs) do you plan to assign to this project if you are selected?
- How many people in total are employed by your company? Delineate between employees and sub-consultants.
- If applicable, list the professional qualifications for each individual that would be assigned to provide services requested by this RFP, including date and educational institutions of any applicable degrees, additional applicable training, and any professional certifications and/or licensing. In lieu of listing this information, you may submit a resume or curriculum vitae for each such individual if the resume/CV includes all the requested information.

### **Proposed Approach:**

This section describes your proposed approach for meeting the services required by the City, as listed above. Relevant considerations include the quality and feasibility of your approach to meeting these needs, the manner in which you plan to provide adequate staffing (if applicable), and equipment or other resources provided by you (if applicable). Keep these considerations in mind as you respond to the following:

- Describe how you will fulfill the needs of the City described in this RFP. Attach a project plan, if appropriate.
- List your needs for physical space and/or equipment at the City during this engagement, if any.
- Identify how you will meet all other aspects of the scope of work and related requirements stated above. List any items that you cannot provide.

### **Cost Analysis and Budget for Primary Services:**

- Provide an itemized budget and a detailed explanation for all costs associated with providing the requested services.
- Is travel time to the city of Wausau or other locations expected to be billable? If so, how will travel time invoices be calculated?
- Include start-up costs if any.

### **Claims, Licensure and Non-Discrimination Violations Against Your Organization:**

List any current licensure or non-discrimination claims against you/your organization and those having occurred in the past five years, especially any resulting in claims or legal judgments against you.

### **Work Samples and References:**

List at least three business references for which you have recently provided similar services. Include contact names, titles, phone numbers and e-mail addresses for all references provided. Also provide any work samples you feel are representative of your work on a similar project.

## **PROPOSAL EVALUATION**

All proposals received will be evaluated by an RFP evaluation committee. During the evaluation process, the City may require a consultant's representative to answer specific questions orally or in writing.

Once a finalist or group of finalists is selected, additional interactions or information may be required. The RFP evaluation committee will select the firm that submits the most responsive proposal. Selection will be based on the overall strength of each proposal, and the evaluation is not restricted to considerations of any single factor, such as cost. A local preference may be used in the selection process.

The criteria used as a guideline in the evaluation will include, but not be limited to, the following:

1. Qualifications and experience of the firm, including capability and experience of personnel

- to be employed on this project.
2. Proposed approach, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed solution/services.
  3. Demonstrated history of successfully performing related services to comparable entities.
  4. Cost for the services described by this RFP and the value provided to the City.

The evaluation committee may consider any other criteria it deems relevant, and the evaluation committee is free to make any recommendations it determines to be in the best interest of the City. Inaccuracy of any information supplied within a proposal or other errors constitute grounds for rejection of the proposal.

Note that the City reserves the right to evaluate proposals solely based on each provider's written submission. In relation to written materials, evaluation will be performed only on the material included directly in the proposal itself unless otherwise indicated or requested by the City. The City reserves the right to select proposals other than those with lowest costs.

#### **ADDITIONAL TERMS AND CONDITIONS**

The City reserves the right to accept or reject any or all proposals or portions thereof without stated cause. Upon selection of a finalist, the City by its proper officials shall attempt to negotiate and reach a final agreement with the finalist. If the City, for any reason, is unable to reach a final agreement with this finalist; the City then reserves the right to reject such finalist and negotiate a final agreement with another finalist who has the next most viable proposal. The City may also elect to reject all proposals and re-issue a new RFP.

The City is not bound to accept the proposal with the lowest cost, but may accept the proposal that demonstrates the best abilities and qualifications to meet the needs of the City. The City reserves the right to waive any formalities, defects, or irregularities, in any proposal, response, and/or submittal where the acceptance, rejection, or waiving of such is in the best interests of the City. The City reserves the right to disqualify any proposal, before or after opening, upon evidence of collusion, intent to defraud, or any other illegal practice on the part of the consultant.

**SIGNATURE BLOCK**

Note: Please return this page with your proposal.

The undersigned, an authorized agent of his/her company, hereby certifies:

( ) familiarization with all terms, conditions, and specifications herein stated,

( ) company is qualified to perform work and services as proposed,

( ) that the proposal submitted is valid until \_\_\_\_\_ (date).

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Title

\_\_\_\_\_  
Type of Entity (S-Corp, LLC, etc.)

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Web Site

\_\_\_\_\_  
Email Address

DRAFT



Novogradac

# Journal of Tax Credits

News, Analysis and Commentary On Affordable Housing, Community Development and Renewable Energy Tax Credits

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## Developer Finishing Third Historic Conversion in Wausau, Wis.

**MARK O'MEARA, SENIOR WRITER, NOVOGRADAC & COMPANY LLP**

**M**etroPlains is known for building housing and preserving historic structures. In Wausau, Wis., it did both.

The developer has nearly completed its third historic rehabilitation in the city, all of which now operate as housing. This time, MetroPlains is developing the Atrium Lofts, a conversion of the former Sav-O Supply building into 29 affordable and market-rate rental apartments. “Our primary focus has always been affordable housing,” said Rob McCready, co-president of MetroPlains, which has built 140 housing developments and has rehabilitated 65 buildings that are now on the National Register of Historic Places.

The former warehouse, which was vacant for the past decade, will have 24 affordable apartments and five market-rate apartments. Seven apartments will be available to residents earning 30 percent of the area median income (AMI), 10 apartments will be available at 50 percent AMI and seven apartments will be available at 60 percent AMI and below. There will be a mix of one-, two- and three-bedroom apartments.

“Sixty percent rent limits for a one-bedroom are \$785, but market rents are \$50 to \$100 less than that. Even though rents are relatively low, construction costs are still high for this type of project,” said Vern Hanson, principal at MetroPlains. “With the financing tools available we could create new housing where it would otherwise have been financially infeasible.”

“Like every community, there is a need for more affordable housing in Wausau,” said Christian Schock, director of planning, community and economic development at the city of Wausau. “And this is a great opportunity.”

In addition to housing, the property will include a community room, a computer lab, an exercise room, a playground, and walking paths and gathering space outside. The property will also feature an outdoor parking lot and Energy Star-rated appliances and lighting. The Atrium Lofts will also connect residents to local services in the community.

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The city, which owned the property, initially looked into demolishing the building. But Paul Mellblom, principal of MSR Design, worked with the city to save the property because it has historical significance to the community. The city commissioned a structural assessment and found the building to be in good condition. Mellblom is now the architect for this development.

“I feel a little bit of ownership because I talked the city out of tearing it down,” said Mellblom, who has worked on all three of MetroPlains’ developments in Wausau. “The Sav-O Supply building is the last one of that vintage and type in Wausau.”

While Schock is happy to see this building preserved and reused, he said it was a challenge. Before redeveloping the property, the city had to do soil remediation and

*Image: Courtesy of MetroPlains Partners LLC*

**The Atrium Lofts were financed using 9 percent low-income housing tax credits and federal and state historic tax credits.**

rid the building of lead and asbestos. “It was a sound building, but it was open to the elements for quite some time,” said Schock.

Atrium Lofts is scheduled to open in February. McCready said there is already a waitlist for half the apartments. Schock is excited to see the historic structure repurposed in the community. “There are not many buildings like this anymore in Wausau,” said Schock.

### **MetroPlains’ Work in Wausau**

Previously, MetroPlains converted the Federal Building into the Federal Building Lofts, which features 21 apartments, of which three are market rate and 18 are affordable. Built in the 1930s, the Federal Building served many purposes, including a post office, a federal courtroom and offices for the Federal Bureau of Investigation and Department of Labor before it was converted into housing.

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MetroPlains also developed the Trolley Quarter Flats, which are adjacent to the Atrium Lofts. Trolley Quarter Flats is a redeveloped and expanded 1920s trolley shed that now features 40 affordable apartments. “People really like unique buildings with some personality,” said McCready. “Our units in the Trolley Quarter Flats and the Federal Building gave us an understanding of what the market needed.”

“MetroPlains’ properties are some of the coolest housing options in the city,” said Schock.

### Historic Preservation

The former Sav-O Supply building was built in the early 1900s and has had a number of uses over the years. Its historic significance came when it was used by the Marathon Shoe Company, which Hanson said

patented a special sole for children called the pied piper. “A particular type of shoe was manufactured in this building. This was the hook that gave it historical significance,” said Schock.

In order to receive both federal and state historic tax credits (HTCs), a number of the building’s defining characteristics were preserved. The stucco exterior, which Mellblom said was peeling off in big sheets, was preserved. The windows were also preserved wherever possible and replaced with historically accurate replicas if they were too damaged or missing. On the interior, the building’s steel frame was left exposed and the concrete floor on the first floor and wood floor on the second floor were also preserved. Other historic features that were preserved include the chimney and the loading dock in the back of the building.

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## MetroPlains’ Impact in Wausau, Wis.

MetroPlains has developed **3** properties in Wausau:



**Atrium Lofts**



**Federal Building Lofts**



**Trolley Quarter Flats**

MetroPlains has developed **82** affordable housing apartments and **8** market-rate apartments in Wausau

Nearly  
**\$6.2**  
million

in LIHTC equity was used  
to develop these properties

Nearly  
**\$2**  
million

in federal HTC equity was used  
to develop these properties

More than  
**\$1.3**  
million

in state HTC equity was used  
to develop these properties

Sources: MetroPlains LLC and Novogradac & Company LLP



continued from page 3

Mellblom said one of the biggest design challenges was the building's square shape, making it hard to convert to apartments. As a result, the building was designed like a doughnut, with an empty center and apartments lining the exterior walls. Because this is a large open warehouse building, Hanson added that it was tough coordinating with the National Park Service on how to divide up the building into apartments. "It was important to preserve the sense of volume," said Mellblom.

### Financing

A combination of tax credits helped preserve this historic structure and transform it into housing. Enterprise was the syndicator, providing \$3.8 million in federal 9 percent low-income housing tax credit (LIHTC) equity and \$1.1 million in federal historic tax credit (HTC) equity. "This investment fits Enterprise's mission to add quality affordable housing in a market with a lot of need," said Sarah Williams, development analyst at Enterprise, which has worked with MetroPlains on 11 developments.

Wisconsin Housing and Economic Development Authority (WHEDA) provided a \$2.9 million LIHTC allocation, a \$4.4 million construction loan and a \$686,848 permanent loan. "This is significant. There will be 24 affordable units, meaning 24 families will now have the opportunity to live in affordable housing. The 24 families will now save a total of \$75,000 a year on rent, and will no longer have to make tough decisions about whether they can put food on the table or shoes on their babies," said Wyman Winston, executive director of WHEDA. "During the 15-year compliance period of the low-income housing tax credits, residents will save a total of \$1.1 million and millions more over

the lifetime of the building. Those are dollars that go back out into the Wausau community, the local economy. Families can now make independent saving or spending decisions, thanks to those extra savings."

Financing also includes \$1 million in state HTC equity from Commerce Bank, \$500,000 in HOME funds from the Wisconsin Department of Administration and \$200,000 in Community Development Block Grant financing and a \$114,000 deferred loan from the city of Wausau. "The state HTCs mesh well with the federal program," said McCready. He added that the state HTCs are attractive to investors because they are fully transferable.

"Special tools like LIHTCs and HTCs justify the private sector investment going into this development," said Schock. "That is the power of tax credits coming in. Only with the assistance of the tax credits would this building be what it is today." ♦

### Atrium Lofts

#### FINANCING

- ♦ \$4.4 million construction loan from Wisconsin Housing and Economic Development Authority (WHEDA)
- ♦ \$3.8 million in federal 9 percent low-income housing tax credit (LIHTC) equity from Enterprise
- ♦ \$1.1 million in federal historic tax credit (HTC) equity from Enterprise
- ♦ \$1 million in state HTC equity from Commerce Bank
- ♦ \$686,848 permanent loan from WHEDA
- ♦ \$500,000 in HOME funds from the Wisconsin Department of Administration
- ♦ \$200,000 in Community Development Block Grant financing from the city of Wausau
- ♦ \$114,000 deferred loan from the city of Wausau

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**alex.ruiz@novoco.com**  
**415.356.8088**

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**Christianna Cohen**  
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