



AGENDA
HEALTH AND HUMAN SERVICES COMMITTEE
HUMAN SERVICES BOARD
REGULAR MEETING
TUESDAY, MARCH 26, 2024 – 8:00 AM
ADMINISTRATION CENTER - ROOM A-200
121 W. MAIN STREET, PORT WASHINGTON, WI 53074

The public can access the meeting by viewing the live stream at the link which will be opened five minutes before the call to order:

[Health & Human Services Committee / Human Services Board Live Stream](#)

The public can submit comments here: [Public Comment Form](#)
[Public Comment Policy & Instructions For Submitting Public Comments Online](#)

- 1. CALL TO ORDER**
- 2. PROPER NOTICE**
- 3. PUBLIC COMMENTS/CORRESPONDENCE/COMMUNICATIONS**
- 4. APPROVAL OF MINUTES**
 - a. February 27, 2024
- 5. LASATA SENIOR LIVING CAMPUS**
 - a. **Action Items:**
 1. Construction Manager as Advisor Services for the Community-Based Residential Facility Construction at the Lasata Senior Living Campus
 - b. **Management/Financial/Informational Reports**
 1. Lasata Campus Monthly Reports
- 6. VETERANS SERVICES OFFICE**
 - a. **Management/Financial/Informational Reports**
 1. Veterans Service Report
- 7. PUBLIC HEALTH**
 - a. **Management/Financial/ Informational Reports**
 1. Public Health Report
- 8. HUMAN SERVICES**
 - a. **Management/Financial/Informational Reports**
 1. HS/Aging/ADRC Financial Report - Feb 2024
- 9. NEXT MEETING DATE**

May 28, 2024 (New Committee)
- 10. ADJOURNMENT**

A quorum of members of committees or the full County Board of Ozaukee County may be in attendance at this meeting for purposes related to committee or board duties, however, no formal action will be taken by these committees or the board at this meeting.

Persons with disabilities requiring accommodations for attendance at this meeting should contact the County Clerk's Office at 262-284-8110, twenty-four (24) hours in advance of the meeting.

Health and Human Services Committee**AGENDA INFORMATION SHEET**

AGENDA DATE:	March 26, 2024
DEPARTMENT:	County Clerk
DIRECTOR:	Karen Niemuth
PREPARER:	Amy Rhines

Agenda Summary February 27, 2024

[<https://www.co.ozaukee.wi.us/AgendaCenter/ViewFile/Minutes/ 02272024-3373>](https://www.co.ozaukee.wi.us/AgendaCenter/ViewFile/Minutes/02272024-3373)

HEALTH AND HUMAN SERVICES COMMITTEE

Health and Human Services Committee

AGENDA INFORMATION SHEET

AGENDA DATE:	March 26, 2024
DEPARTMENT:	Administrator
DIRECTOR:	Jason Dzwinel
PREPARER:	Jason Wittek

Agenda Summary Construction Manager as Advisor Services for the Community-Based Residential Facility Construction at the Lasata Senior Living Campus

BACKGROUND INFORMATION: The County Board authorized by Resolution in September, 2023, the solicitation and selection of a construction management firm for the construction of a \$4.5 million Community Based Residential Facility (CBRF) at the Lasata Campus. Preliminary design plans estimated \$4.5 million in construction expenses to complete the proposed 18,000 sf CBRF, housing 24 residents split into two households, with residential and services spaces. ARPA funding was set aside for this project in the authorizing resolution.

Hiring a Construction Management firm is the first step in completing this project. Architectural & Engineering (A/E) Services will be solicited next, and then work on pre-construction design and construction specification documents will be developed for a bid package. Construction is expected to commence later this year. The Construction Management firm works as an advisor to the County providing pre-construction and bid solicitation services, will act as a on-site construction manager, , providing oversight of primary construction contractors, project and budget management, scheduling and analysis of change orders. The Construction Management firm will work as part of a team with the A/E firm and County staff. The Construction Management firm will be retained through the entire project, ending at construction completion.

ANALYSIS: A Request for Proposals (RFP) was let by the County, due March 14th. Three quality proposals were submitted by; 1) Altius Building Company, 2) Catalyst Construction, and 3) Greenfire Management Services, all headquartered close by in Milwaukee. A selection committee met as a team to score and rank the proposals by consensus, according to the scoring criteria in the RFP.

While the cost proposal was part of the scoring criteria, it was not the only factor in selecting the construction management firm, as this was not a construction bid, but a professional services contract. All three construction management firms came in at a higher fee than originally anticipated. This may be due to the inclusion of a full-time construction superintendent. Altius Building and Catalyst Construction both scored an 85, while Greenfire scored a 75. The fee proposal from Altius Construction is the lowest at \$297,340, followed by Green Fire at \$340,290, and Catalyst was the highest at \$415,160. Please see below, and the attached summary

scores.

ALTIUS SCORE	85
TOTAL PROJECT HOURS	2,796
TOTAL PROJECT ESTIMATE	\$297,340
HOURLY RATE	\$106.34

CATALYST SCORE	85
TOTAL PROJECT HOURS	2,796
TOTAL PROJECT ESTIMATE	\$415,160
HOURLY RATE	\$148.48

GREENFIRE SCORE	75
TOTAL PROJECT HOURS	2,040
TOTAL PROJECT ESTIMATE	\$340,290
HOURLY RATE	\$166.81

Staff respectfully asks the committee to determine award of the Construction Manager as Advisor Services to either Altius or Catalyst based on the score and fee proposals.

FUNDING SOURCE: Indicate source: American Rescue Plan Act (ARPA) \$4.5 million

RECOMMENDED MOTION: Approve Award of Construction Manager as Advisor Services for the CBRF at Lasata Senior Living Campus

ATTACHMENTS:

- Construction Manager Proposal Scoresheet_3-19-24 (PDF)
- 1_Altius_OzaukeeCoLasataCBRF_Proposal (PDF)
- Catalyst_Lasata Senior Living - Ozaukee County (PDF)
- Greenfire CMaA Services Proposal Ozaukee County CBRF (PDF)
- Lasata CBRF RFP & Addendum_2024 (PDF)

HEALTH AND HUMAN SERVICES COMMITTEE



**Evaluation of Request for Proposals
for Construction Management as Advisor Services for Construction of a CBRF at Lasata Senior Living**

	Project Coordinator/Lead's Experience	Firm's Project Completion Background & Capabilities	References from Similar Projects	Project Understanding, Responsiveness to Scope	Budget/Cost Proposal	Total
	Max 20 Points	Max 20 Points	Max 20 Points	Max 25 Points	Max 15	100
Altius Building Company	15	20	15	25	\$297,340 (10)	85
Catalyst Construction	20	20	20	25	\$415,160 (0)	85
Greenfire	15	15	10	25	\$340,290 (10)	75
Selection Criteria	Qualifications, experience, and ability of project coordinator exceed what is required 20pts Qualifications, experience, and ability meet what is required 15pts Qualifications, experience, and ability less than required 10pts Less than 1 year experience in project coordination 5pts No experience/inadequate 0pts	Direct experience with CBRF projects within proposed timeframe & budget 20pts Comparable or similar projects or public construction 15pts Demonstrates competence but no direct CBRF or public construction experience 10pts Working on a similar project; not yet completed 5pts No work on a similar project 0pts	Respondent lists 3 previous clients with similar projects and all references give excellent response on quality of service 20pts Respondent lists 2 previous clients 15pts Respondent lists 1 previous client 10pts Respondent lists no previous references 0pts	Needs of project are fully addressed in Proposal 25pts Needs of project are somewhat addressed in Proposal 15pts Needs of project are not addressed/resolved in Proposal 0pts	Budget within Ozaukee County's capacity as proposed 15pts Budget slightly above Ozaukee County's capacity as proposed; potentially feasible with modest adjustment 10pts Budget not reasonably within Ozaukee County's capacity as proposed; would require extensive adjustment to be feasible 0pts	

ALTIUS BUILDING COMPANY

BUILDING BETTER TOGETHER



Proposal Response Prepared for:



Lasata Senior Living Campus CBRF



325 E. Chicago Street, Suite 300, Milwaukee WI 53202
www.altiusbuildingco.com | 262.641.8811



March 14th, 2024

Ozaukee County
County Administrator's Office
Attn: Lasata CBRF Construction Management
P.O. Box 994 | 121 W. Main Street
Port Washington, WI 53074

Dear Mr. Dzwinel and Mr. Wittek,

We are immensely honored to be under consideration and *have a keen interest* for the construction management services related to your new 18,000 SF, 24-bed CBRF at the Lasata Senior Living Campus in Cedarburg. Recognizing the scope of the project, encompassing residential bedrooms, support services, amenity spaces, and ADA standards, we have taken the time to thoroughly comprehend your objectives and review our past projects (Lasata Crossings and Lasata Care Center) on site.

At Altius Building Company, we view this opportunity not merely as a project, but as the foundation for continuing to build a lasting partnership with Ozaukee County and Lasata. With a legacy of tenured staff, we offer an unparalleled depth of sophistication in the construction field. This wealth of experience enables us to provide expedited and comprehensive solutions, particularly when it comes to the Lasata Senior Living Campus projects.

Key Reasons to Choose Altius Building Company:

1. **Lasata Senior Living Focus:** Our past projects for Lasata and our budgeting for the CBRF project give our team an edge of inside knowledge; meaning we are ready to start today. Our commitment to excellence remains unwavering as is our knowledge of your site, internal processes, approvals, and project requirements.
2. **Proven Success:** Our success is underscored by repeat clients and enduring partner relationships. We stand by our promise to deliver on time and within budget.
3. **Nurturing Project Culture:** Altius employs a management process that fosters a team-oriented culture, exemplified by our ability to consistently deliver projects on time, under budget, and with minimal change orders.
4. **Non-Self-Performance:** Our firm's policy of not engaging in self-performance ensures flexibility and agility. We are not signatory to labor unions, allowing us to adapt to project needs while enhancing quality, subcontractor accountability, and checks and balances.

Enclosed herewith, you will find Altius' comprehensive Request For Proposal response. We certify that the information submitted within this proposal is true and complete to the best of our knowledge. Questions regarding this submittal should be directed to Andy Klimpel, at the address listed below, 262-613-2450, or at aklimpel@altiusbuildingco.com.

We look forward to the opportunity of building better together,

Scott Drees, President & CEO

Altius Building Company

262.827.5784

325 E. Chicago Street, Suite 300, Milwaukee, WI 53202

www.altiusbuildingco.com | 262.641.8811

PROJECT SCOPE STATEMENT

PHASE I - PRE-CONSTRUCTION SERVICES

Senior Project Manager, Andy Klimpel has over 30 years of experience working with development teams and skillfully acts as the company's liaison between the architect/engineer, contractors, consultants and vendors throughout the project. Each contractor's bid is scrutinized for completeness, responsiveness, pricing and coordinated with any technical review that may be required by the designer. Post-bid interviews are conducted to ensure project scope clarity, review bid exceptions, and discuss any alternatives the bidder may have submitted.



The services during the preconstruction phase, include, but may not be limited to the following:

- Work with and assist in selection of architect and engineering services to be retained by the County
- Attend all work team meetings
- Review the schedule and construction budget furnished by the County to ascertain the requirements of the project and ensure a mutual understanding of requirements
- Meet with County staff (County Administrator's Office, Lasata Senior Living Campus Director, etc.), architect and engineering firm as required to confirm the prepared program information (preliminary plans and cost estimates), and to develop the desired program and features for the facility, and methods of project delivery, to include potential performance evaluations of alternative materials and systems
- Assist the architect and County in developing a project budget for construction costs, miscellaneous expenses (utilities, survey, testing, etc.), furnishings and contingency
- Prepare preliminary cost estimates for program requirements based on early schematic designs
- Update and revise construction estimates as the architect progresses through 30, 60, 90 design development, and construction documents
- Advise the County and architect if it appears the construction cost may exceed its portion of the approved project budget and make recommendations for corrective actions
- Make recommendations whenever design details adversely affect constructability, cost, or construction schedule
- Periodically update the project schedule for the design team's review and the County's acceptance
- NOTE: If bid prices exceed budget amounts, the Lasata team may select alternate bid items or redesign the buildings and improvements to bring the bid prices for the Project to within budget.

PROJECT SCOPE STATEMENT

PHASE II - CONSTRUCTION PHASE - ADMINISTRATION OF CONSTRUCTION CONTRACT

Our pledge is to establish lasting relationships with our customers by exceeding expectations, gaining trust through transparency, and providing excellent performance and professionalism. When the construction phase is ready to begin, Altius Building Company will be with you and the subcontractors throughout every step of the project. All construction projects have a variety of moving parts and pieces. Budget and schedule details, changing building models, evolving design, and perhaps shifting stakeholders as the process unfolds. This is where our hands-on experience, technical know-how, strong subcontractor relationships, and a knack for looking at things a little differently all comes into play. With a trusted building team on board during the early phases, your project is set up for success. We have long provided a full spectrum of construction services that our clients depend on. We offer an integrated approach with an array of construction administration services - making sure the entire building team has access to a total cost, scheduling, and constructability information.



Construction Administration Phase services during the construction phase of this project include the following:

- Prepare all necessary bid documents for solicitation of construction contracts in consultation with the County and architect
- Provide a full-time superintendent on-site during construction
- Act as an Owner's Representative during construction in cooperation with the architect and County, and provide cost and schedule updates and forecasts to the County and architect
- Develop and implement procedures for review and processing of applications for payment from the Contractors; review payment applications with the County
- Lead all construction progress meetings including meeting minutes, advise the County on all change order requests during construction, and regular meetings with the County's Health and Human Services Committee and act as an owner's representative.

PROJECT MANAGEMENT METHODOLOGY

COST ESTIMATING

Our company utilizes the Pantera bidding system for bidding all projects. Our database of subcontractors is well over 2,000 and if need be the Pantera system opens additional doors to potential subcontractors throughout the nation. Our extensive cost estimating/trade contractor process is detailed out within the "Project Work Plan" section of this proposal response and is specifically explained under the Sample Work Plan.

COST CONTROL AND REPORTING

Our expertise in cost control maximizes the economies and the performance of building systems for the life of your project. We establish transparent administration processes, along with accurate construction estimates through every project stage, avoiding time and money loss as a result of a redesign. Working collaboratively with design professionals, as well as all members of the team, assures your project is the most efficient and economical. Our seasoned staff offers suggestions on cost conscious ways to design, without sacrificing the project's aesthetic, or quality. At Altius, we understand that budget management doesn't end with project completion. The cost of operating and maintaining each property we build is kept low through our use of quality building products, skilled subcontractors, and expert construction managers. A unified approach improves data accuracy and prevents costly errors. At Altius, invoices and payment to subcontractors are processed promptly, change orders are completed accurately and timely, and innovative computer software, in both accounting and project management, decreases the numbers of steps it takes to complete a task. One of the most common reasons for a budget 'bust' and cost overruns is lack of communication. With advanced collaboration software, Altius team members can access project data, schedules, and lists on mobile devices. With the ProjectSight platform everyone stays in the loop with project alerts for actionable items and/or change orders. **Put simply, we make certain that every member of the team has the information they need to do the work right, the first time.**



QUALITY CONTROL & ASSURANCE

Fulfilling our commitment to quality requires the involvement of every project participant. Altius Building Company uses a Project Management and Quality Assurance Plan to ensure that all projects meet or exceed quality standards. This includes guarantying quality service while creating competitive market advantages and providing direction to all project participants, leading to a successful project completion.

The Project Superintendent provides quality control oversight and guidance throughout the duration of the project. Pre-installation meetings are conducted with all trades prior to the commencement of their respective work. These include manufacturer's representatives to ensure installation of product conforms with manufacturers' standards and warranty.



A dedicated quality control champion and additional quality control inspectors or field engineers may be assigned during project phases that warrant the measure. The Superintendent keeps a daily log and other records to document inspections, observed construction techniques in order to report the status of on-going testing and data. Test results are then reported, providing timely authorization to proceed with the work. Keeping track of updated drawings, providing guidance to the subcontractors, and being proactive ensures that Altius Building Company provides a quality product, on-time and within budget.

DRAWING AND SPECIFICATION REVIEW

Altius diligently reviews, and concentrates on the integrity of the construction documents and specification details. Design documents should be easily understood and clearly communicate the design intent. We advocate for our clients and work with the architects to ensure documents are free of significant design errors, omissions and ambiguities. We believe that contract provisions should be capable of being administered and enforced resulting in fewer change orders.

SUBCONTRACTOR MANAGEMENT

The work of all subcontractors is coordinated by the on-site Project Superintendent to ensure trade integration into the construction process. A project master schedule is developed that establishes schedule constraints and identifies contractual and significant internal milestones, as well as possible delays. Subcontractor meetings are conducted on a weekly basis to provide visibility to the work being performed, inspiring an opportunity for discussion, planning, and problem solving.

SITE UTILIZATION AND PROJECT SAFETY

Increasing construction job protection reduces the dangers and risks for workers and maximizes the productivity and quality of the work. Our safety program, led by industry expert, Bruce Morton, of Marsh & McLennan, starts with Altius' upper management, which flows down to all workers. Altius is committed in providing our staff with ongoing OSHA certification courses.



Before work commences, a strategic project safety plan is developed, providing an overview of work scope, roles, and responsibilities. Each day the site is walked and monitored for safety, making corrections and implementing and enforcing best practices.

All subcontractors have access to safety manuals, outlining safety expectations and criteria; they are also required to submit an individualized project specific safety plan. Weekly Toolbox Talks are also conducted by Superintendents. To complete a quality and successful project on schedule, Altius eliminates job site hazards and risks, deploying a workforce that follows the rules, regulations, and invokes a relentless, always improving safety culture.

CONSTRUCTION SCHEDULING

Maintaining a construction project schedule is one of the most critical parts of a project. In addition to cost control, Altius Building Company gives considerable attention to monitoring schedules. Our skilled Project Managers and Superintendents are able to accurately forecast the time needed to complete each construction component, preventing delays and additional costs. Regularly scheduled meetings and consistent communication with all team participants allows the schedule to stay on-track and project to stay within budget.



PROJECT WORKPLAN

Altius Building Company utilizes a project management software called [ProjectSight](#). This software platform allows for all project team members to efficiently communicate project details, and upload project-related documents such as drawings, specifications, submittals, and RFI's. After each meeting, the Project Manager issues Meeting Minutes in electronic and hard copy form (they're also generated from within the ProjectSight system and are available virtually), which includes general information, new items, pending issues, next meeting information, submittals, RFI's, and schedule(s). The Meeting Minutes encompass key reports, changes, schedules, budgets, and value engineering decisions on a weekly basis. As part of the project, a member has access to these key documents in real-time format 24 hours a day and seven days a week.

All project-related communication is documented and filed within the Meeting Minutes and are provided at team meetings, which [transpire weekly and are face-to-face](#) once construction starts. Periodic updates are tracked within the Meeting Minutes and our Project Managers and Superintendents are in [daily, verbal communication](#) with the client and subcontractors in relation to work progress and needs as the project progresses in the construction phase. RFI's are tracked within ProjectSight and our production staff strives to respond within a 24-hour timeframe.

An example of our Budgets, Meeting Minutes, RFI's, Schedules, Submittals, and Transmittals, are available upon request. The following pages include a brief, typical work plan followed by our publicly funded client examples who utilized a similar work plan approach.

SAMPLE WORK PLAN

CONCEPT & FEASIBILITY CONFIRMATION

- Partnering Meeting
- Team Responsibility Matrix
- Initial Budget Evaluation
- Project Milestone Schedule
- Documentation and Investigation Schedule
- Preliminary Budgets

30% DESIGN PHASE

- Preliminary Project Schedule
- 30% Design Budget
- 30% Design Value Management Review

60% DESIGN PHASE

- 60% Design Budget
- 60% Design Value Management Review

90% DESIGN PHASE

- Bidding Phase Schedule
- Construction Phase Milestone Schedule
- 90% Design Value Management Review



PROJECT WORKPLAN

TRADE CONTRACTOR BIDDING

Contract Packaging Strategy
Write Instructions to Bidders
Create Bid Forms
Bidders Interest Campaign
Distribution of Bidding Documents
Information to Bidders and Addenda
Pre-Bid Conference
Bid Opening and Evaluation

BID REVIEW & CONTRACT AWARDS

Tax Exempt Purchasing
Pre-Contract Review
Building Permits
Subcontractor Pre-Construction Meeting

CONSTRUCTION PHASE

Job Progress Meetings
Project Schedule Updates
On-Site Project Supervision
Quality Control Program
Safety Program
Monthly Progress Payments
Lien Waivers
Shop Drawings
Project Cost Control

PROJECT CLOSE-OUT PHASE

Punchlist Execution
As-Built Drawings
Final Accounting
Quality Assurance



NOTE: Our fully detailed project workplan, safety policy, and procurement plan is available upon request.

CONSTRUCTION MANAGEMENT CLIENTS

PUBLICLY-FUNDED ENTITY PROJECTS

CITY OF CEDARBURG

Cedarburg Public Library
Architect: Engberg Anderson

Cedarburg Public Works Facility
Architect: Kueny Architects

CITY OF KENOSHA

Kenosha Public Library - Uptown Lofts
Architect: Engberg Anderson

CITY OF MILWAUKEE

Housing Authority. Westlawn Neighborhood
Architect: Torti Gallas & Partners, Inc. &
Kindness Architects

OZAUKEE COUNTY

Lasata Crossings Assisted Living Facility
Architect: Plunkett Raysich Architects

Lasata Care Center
Architect: Horthy Elving

Ozaukee County Fairgrounds Development
Architect: Kahler Slater Architects

STATE OF WISCONSIN

State Fair Police Department Renovation
Architect: Continuum Architects

TOWN OF MUKWONAGO

Town Hall and Police Station Renovation
Architect: Kueny Architects

VILLAGE OF CHENEQUA

Village of Chenequa Police & Fire Department
Architect: AG Architecture

VILLAGE OF HOWARD

Howard Commons Apartments, Buildings A & B
Architect: AG Architecture

Howard Commons Apartments, Building C
Architect: AG Architecture

VILLAGE OF SHOREWOOD

Shorewood Public Library
Architect: Engberg Anderson

WASHINGTON COUNTY

Samaritan Health Center
Architect: Plunkett Raysich Architects

The Fields of Washington County
Architect: Plunkett Raysich Architects

Washington County Humane Society Addition &
Renovation, Phases 2-4
Architect: The Kubala Washatko Architects

Washington County Fair Park Pavilion
Architect: Mayer Helminiak Architects

Washington County Herbert J. Tennes Government
Center New Elevator Addition
Architect: Plunkett Raysich Architects



LASATA CROSSINGS & LASATA CARE CENTER



Client:
Ozaukee County

Scope:
Lasata Crossings - Renovation
Lasata Care Center - Renovation

Project Size:
Lasata Crossings - 60,000 SF
Lasata Care Center - 137,000 SF

Crossings: A multi-phase renovation and modernization was completed at the Lasata campus in Cedarburg. Lasata Crossings was built west of the Lasata Care Center and Independent Living Apartments. This project was designed so that the facility would be equipped to handle resident's increased needs. The building includes a fitness center, beauty salon, library, and a dining room that opens to a balcony. Extensive renovations of the adjacent Lasata Heights was also completed and included common areas, corridors, bathrooms, main dining room, serving kitchen, and community room.

Care Center: This project encompassed a significant four-phase renovation of the campus's 137,000 square foot skilled nursing facility. Each phase involved renovations to a resident room wing and the adjacent facility core area. Current residents in each wing were relocated within the facility during the transformation of their wing. Disruptions for staff and residents were minimized. Components of the project included a renovated entry lobby, a physical and occupational therapy suite, activity areas and newly renovated offices for staff. The facility's ventilation system, boiler plant and electrical systems were also replaced to add to the comfort and quality of life for residents.



HARBORCHASE OF SHOREWOOD


Client:

HRA Senior Living

Scope:

New Senior Living Campus

Project Size:

113,542 SF
59 Units RCAC
35 Units CBRF

Altius Building Company was proud to be part of the HarborChase of Shorewood project, a senior living community. This facility included a 59-unit assisted living residence (residential care apartment complex - RCAC) with underground parking and a 35-unit, single-story memory care facility (community-based residential facility - CBRF). Connecting the two buildings is a large commons area that provides multiple dining options, a fitness/wellness facility, staff offices, outdoor courtyards, activity areas, a commercial salon open to the public, as well as multi-purpose rooms.



SAMARITAN HEALTH CENTER



Client:
Washington County

Scope:
Renovation

Project Size:
130,000 SF

Renovations and modernization of the existing Samaritan Health Center, a skilled nursing facility, included updating 31 single CBRF units, 199 individual units, and six double occupancy rooms. This project also included an addition to a central nurse station and several new staff areas. The dining rooms and kitchen were updated to give more of a "home-like" feel.

THE FIELDS OF WASHINGTON COUNTY



Client:
Washington County

Scope:
New Assisted Living Facility

Project Size:
26,000 SF | 24 Units

Work for Washington County on this project included a new two-level 24-unit assisted living apartment facility with a mix of spacious studio and one-bedroom units. A connector was constructed to the Samaritan Health Center, a 228-bed skilled nursing facility, governed and owned by the county. Residents have access to limited medical treatments, but not the intensive services of the health center.

REFERENCES

Contact: Chief Thomas Czarnecki, 262.363.5188,
tczarnecki@mukwonagopolice.org



Town of Mukwonago Police

W320 S8315 Beulah Road • Mukwonago, WI 53149
(262) 363-5188 • Fax: (262) 363-1575
mukwonagopolice.org



March 5th, 2024

Mr. Scott J. Drees
President & CEO
Altius Building Company
325 E. Chicago Street, Suite 300
Milwaukee, WI 53202

Dear Scott,

I am pleased to provide this letter of recommendation for Altius Building Company based on your outstanding performance during the renovation project for the Town Hall, Police Station, and Fire Department in Mukwonago, Wisconsin.

The project involved a comprehensive renovation encompassing 3,200 square feet of space, including demolition of existing structures, installation of new walls, ceilings, flooring, and a myriad of other construction elements. Throughout the duration of the project, Altius demonstrated an unwavering commitment to excellence in every aspect of their work.

One of the most commendable aspects of Altius' performance was your exceptional responsiveness to requests for information (RFIs) and your ability to swiftly resolve challenges encountered in the field. Eric Larson's effective communication with town officials ensured that all stakeholders were informed and involved in decision-making processes, leading to a seamless execution of the project and little disruption of services while under construction. Eric was someone we could depend on to get things done.

Furthermore, Altius Building Company displayed a caring and accommodating nature towards special requests, demonstrating your dedication to meeting the unique needs of our staff. Your collaborative approach with subcontractors and vendors facilitated efficient scheduling and procurement of materials, ultimately enabling the project to stay on time and within budget.

Overall, I have been thoroughly impressed by Altius' professionalism, expertise, and commitment to delivering high-quality results. I would not hesitate to recommend you for any future construction projects, and I am confident that you will continue to excel in future endeavors.

Sincerely,

Chief Thomas Czarnecki
Town of Mukwonago Police Department

REFERENCES

Contact: John C. Decker, 414.312.1170, john.decker@wistatefair.com



March 11, 2024

Mr. Scott J. Drees
President & CEO
Altius Building Company
325 E. Chicago Street, Suite 300
Milwaukee, WI 53202

Dear Scott,

I am writing to express my utmost satisfaction with the exceptional services provided by Altius Building Company during the renovation of the first floor of our existing building, 679 S. 76th Street, to accommodate the future home of the State Fair Park Police in West Allis, Wisconsin. Throughout the project, Altius Building Company exhibited a transparent approach, fostering trust and confidence among all stakeholders involved.

One of the most commendable aspects of Altius' service was your proactive approach to resolving constructability issues before they could impact the project timeline or budget. John and Eric's foresight and attention to detail saved both time and resources, demonstrating their dedication to delivering high-quality results.

Furthermore, the collaboration between Altius, the State of Wisconsin Department of Facilities Development staff, and the Wisconsin State Fair was seamless. Altius facilitated effective communication and coordination between all parties (albeit face-to-face, via phone or email), ensuring that everyone was aligned with project goals and timelines.

Altius also demonstrated exemplary accountability by holding subcontractors to the highest standards of performance and schedule adherence. John and Eric's meticulous oversight and management of subcontractor services has contributed to the overall success of the project.

Additionally, Altius always had the end-user in mind throughout the project, which allowed for the anticipation of needs not considered at the onset of the project. John and Eric's commitment to understanding and fulfilling our specific needs and requirements will no doubt ensure that the final result will exceed our expectations.

In conclusion, I wholeheartedly recommend Altius Building Company for any construction management project. Their transparent approach, proactive problem-solving, seamless collaboration, accountability, and commitment to customer satisfaction make them an invaluable partner in delivering successful construction projects.

Sincerely,

John C. Decker, P.E.
Capital Improvements Manager – Wisconsin State Fair Park

REFERENCES

Contact: E.J. Herr, 414.477.6314., ej@fstreet.com.

F Street Development Group

FStreetDevGroup.com
F Street Development Group, LLC
build@FStreetDevGroup.com

September 02, 2022

Dear ABC Project of Distinction Award Committee,

The GreenLink Residences and Public House 55 Taproom & Beer Garden Project was created and realized by F Street Development Group (FSDG) in response to several needs identified in the Village of Brown Deer's Community Master Plan. This included a new community square and greenspace, an event pavilion, taproom and beer garden to serve as a gathering place for the general public and an amenity for the residents of the two (2) Greenlink Residences apartment buildings. The apartment buildings offer a mix of unit types and amenities that include easy access to the Oak Leaf / Brown Deer Trail System, a clubroom, fitness center, outdoor pool, and sun deck, that were all designed with a contemporary aesthetic and planned to complement its surroundings, foster tenant diversity and suit active lifestyles. This was all the result of a close partnership and collaboration between FSDG, Village of Brown Deer, RINKA+ and Altius Building Company along with a highly skilled team of specialty consultants, trade partners and vendors that shared the expertise necessary to produce an efficient, high performance and quality product offering.

The project team had to overcome several challenges and was met with unforeseen circumstances that included a global pandemic, supply chain disruptions, workforce / labor shortage and consistent material cost increases to name a few, but in the end led by our partners at Altius Building Company, and RINKA+, who exhibited great agility and flexibility, delivered all three (3) buildings on time and budget. Through hands-on jobsite supervision, constant and highly effective means and methods of communication, tenacity, mutual trust and respect, empathy and compassion for the safety and well-being of everyone involved as well as those adjacent to the daily activities on the respective jobsites, Altius delivered our vision, and these were just some of the many keys to the project's success.

We couldn't be happier with the results as is the Village of Brown Deer and the surrounding community... Since Greenlink Residences and Public House 55 was completed in June of 2022, and at the point in time this letter was drafted lease and occupancy rates are in excess of 83%, which far exceeds our initial goals and expectations for the property.

We're already looking for the next opportunity for this team to partner and collaborate on, as it will certainly be met with similar success based on the experiences we had together on this amazing project. Many thanks to everyone directly and in-directly involved, as without you the project wouldn't have been the great success that it is.

Thank You.
Sincerely,



E.J. Herr
Director of Project Delivery
F Street Development Group

SIMILAR SERVICE CLIENTS

Altius Building Company has completed projects for the following similar clients.

GreenLink Residences + Public House 55 - Brown Deer, WI

Owner: F Street Development Group
Project Size: 141,939 SF; 134 New Residential Units; Three Buildings

Manorpointe - Oak Creek, WI

Owner: Premier Care Centers
Project Size: 98,000 SF 65 New Assisted Living Units

Meadowmere - West Allis, WI

Owner: Premier Care Centers
Project Size: 45,000 SF 61 New Assisted Living Units
8,800 SF; 20 New CBRF Units

St. Catherine's Commons - Kenosha, WI

Owner: St. Catherine Commons
Project Size: 210,000 SF; 160 New Senior Housing Units

SIX65 Brookfield Apartments - Brookfield, WI

Owner: Six55 Brookfield, LLC.
Project Size: 36,306 SF; 24 New Residential Units

State of Wisconsin State Fair Park Police Department - West Allis, WI

Owner: State of Wisconsin
Project Size: 4,600 SF; Adaptive Reuse Renovation

The Quin - Milwaukee, WI

Owner: Andkc (form. Linden Street Partners)
Project Size: 86,497 SF; New 70-Unit Multi-family Development with Retail

The Yards - Milwaukee, WI

Owner: Andkc (form. Linden Street Partners)
Project Size: 102,367 SF; New 86-Unit Multi-family Development

Town of Mukwonago - Mukwonago, WI

Owner: Town of Mukwonago
Project Size: 3,200 SF; Fire, Police, and Town Hall Renovation

Washington County Humane Society Phases 2-4 - Jackson, WI

Owner: Washington County Humane Society
Project Size: Phase 2: 12,200 SF, Phase 3: 5,205 SF; Phase 4: 7,200 SF
(addition/renovations)

Will Rose Luxury Apartments Phase 1 & 2 - Muskego, WI

Owner: Basse Family Trust
Project Size: Phase 1 - 97,756 SF; 51 New Residential Units
Phase 2 - 67,879 SF; 45 New Residential Units



PROJECT TEAM STATEMENT - EXECUTIVE STAFF



Scott Drees
President & CEO

Drawing on his broad background of over 20+ years of experience, which includes all facets of construction, Scott manages the operations of the company and oversees each project team. Clients seek his personable demeanor and have come to rely on Scott for a winning combination of sophistication, cost structure, and an unwavering commitment to client satisfaction. Scott holds a B.S. in Construction Management from the Milwaukee School of Engineering. He also holds a LEED AP BD + C certification and is a Certified Professional Constructor (Level 1AC) from the American Institute of Constructors. He also serves on the Froedtert & MCW Digestive Disease Board.



Shawn Selk, CPA
CFO

As CFO, Shawn is responsible for the administrative, financial and risk management operations of the company, including the development of a financial and operational strategy, metrics tied to that strategy, and the ongoing development and monitoring of control systems designed to preserve assets and report accurate results. Shawn supervises the company's internal accounting team and performs accounting functions for the company. Tasks include creating financial reports, maintaining the accounting records, and establishing a comprehensive set of controls and budgets designed to mitigate risk, enhance the accuracy of the company's financials and ensure the reported results comply with accounting and financial industry standards.



Darren Miller
Vice President

After starting his Milwaukee-based career in architecture and design, Darren's 25-year career has afforded him a diverse level of experience within the architecture, construction, and real estate space. Having trained his focus in owners' representation, project management and design development, he relies heavily on his postgraduate training having delivered more than \$100M in construction for the financial, data security, communications, hospitality, and executive residential sectors.

Darren holds a master's degree in architecture from the School of Architecture and Urban Planning at UW-Milwaukee. An alumnus of the Milwaukee Business Journal's "40 under 40" class of 2013, he is also humbled to be a past president (2020-2021) of the Rotary Club of Milwaukee.



DIRECTOR OF OPERATIONS & SENIOR PM

ANDY KLIMPEL

Primary Work Location - Milwaukee Office

33 YEARS OF EXPERIENCE

20 Years with Altius Building Company

EDUCATION

University of Wisconsin-Madison
B.A. Economics

CERTIFICATES & LICENSES

OSHA Safety & Health
Training Certification

ABC Apprenticeship Program
State of Wisconsin

Journeyman Carpenter
Certification

LEED AP Accreditation

GSA Security Clearance

PROFESSIONAL AFFILIATIONS

ABC Wisconsin

C: 262.613.2450

aklimpel@altiusbuildingco.com



SUMMARY

Andy is a results-oriented, hands-on, and passionate construction professional with 33 years of experience in all facets of the industry. He has extensive knowledge of safety standards and holds a track record for the successful completion of multi-million-dollar projects through coordinating trades, developing partnerships, and building a positive rapport with his clients, architects, subcontractors, local officials, and other team members. As a Senior Project Manager, Andy leads all functions of construction project management including: planning, designing, processing, managing staff, supervising subcontractors, budgeting, scheduling, progress reporting, and timely completion of projects.

REPRESENTATIVE PROJECTS

- Lasata Senior Living Campus CBRF Budgeting
- The 2100 Urban Residence
- Howard Commons
- GE Healthcare Remodeling Projects
- The Oriental Theatre Historic Renovation, Phases 1-4
- The Washington County Humane Society
- Milwaukee Historic Gaslight Building, 9th Floor
- Frank Lloyd Wright WI American System-Built Homes
- U.S. Federal Courthouse Milwaukee, Judge's Chambers
- Harbor View Plaza
- State of WI Richard Bong Recreation Shared Operations
- State of WI State Fair Park Police Department
- City of Mequon Lemke Park Combined Concession
- Washington County Herbert J. Tennes Government Center New Elevator

REFERENCES

Washington County
Cara Herdrich
262.335.7707

Ozaukee County
Jason Wittek
262.284.8324

The Kubala Washatko Architects
Vince Micha
262.377.6039



SUPERINTENDENT

ERIC LARSON

Primary Work Location - Milwaukee Office

13 YEARS OF EXPERIENCE

6 Years with Altius Building Company

EDUCATION

Waukesha County Technical
College - Criminal Justice
Associate Degree

University of Wisconsin-
Whitewater Business Courses

CERTIFICATES, LICENSES & SERVICE

United States Army Reserve
- Sergeant/Interior Electrician
- One Tour to Afghanistan

United States Marine Corps
- Sergeant/Helicopter Mechanic
- Two Tours to Iraq

City of Brookfield - Former
Police Officer

City of Dousman and
Mukwonago - Former
Firefighter

OSHA 30 Certified

DOD Secret Security Clearance

C: 414.315.1486
elarson@altiusbuildingco.com



SUMMARY

As a superintendent for Altius Building Company, Eric's main responsibility is to manage and coordinate the on-site construction progress and team/trades. He oversees all work on-site, attends production team meetings, reviews the project schedule and budget with the project manager to ensure deadlines and milestones are achieved. He also monitors on-site safety compliance, cleanliness and daily field reports and is a liaison with inspection authorities regarding approvals.

REPRESENTATIVE PROJECTS

- 325 E. Chicago Street Suite 300 Renovation
- Barnett Lane Residence
- Cornerstone Church
- Private Residence - New Berlin (Waukesha)
- Private Residence - Pine Lake (Waukesha)
- Erin Hills Golf Course Clubhouse and Barn
- Harbor View Plaza
- Private Residence 2 Pine Lake (Waukesha)
- St. Anthony's Apartments
- State of Wisconsin - State Fair Park Police Department
- The Brickyard, New Corporate Office
- The Quin Apartments
- The Yards Apartments
- Town of Mukwonago Town Hall and Police Station Re-modeling
- Private Residence Addition - Pine Lake (Waukesha)

REFERENCES

State Fair Park
John Decker
414.312.1170

Town of Mukwonago
Chief Thomas Czarnecki
262.363.5188

Tom & Sue Touchett
414.531.2160 Sue
414.254.9023 Tom

PROJECT TEAM STATEMENT & COMMITMENT

It is the intention to have the same Project Manager, and Project Superintendent for the entire duration of the contract. For critical staffing needs such as during an illness or unexpected work stoppages, Altius Building Company has proactively put forth a continuity/contingency plan for each project. Bi-weekly, company wide, meetings provide an overview, work schedule, and detailed understanding of all current projects. Should a staff replacement need to be made, our collaborative efforts provide a flawless transition for replacement staff. All of our Project Managers and Superintendents are highly experienced and are able to provide the knowledge, attention to detail, and skill set that your project requires. Regardless, no project team member will be replaced or substituted without consulting the County for approval.

This has been especially important since the onset of COVID-19. We have been proactive in protecting our staff and have implemented new standards and protocols on our sites in order to maintain health and minimize exposure resulting in less delays or work stoppages. For this development we have identified Brandon Applebee as a key backup and support system.

Brandon Applebee, Director of Project Management and Senior Project Manager, will move into the Senior Project Manager/Superintendent role should the need arise. With more than 30 years of experience managing projects, Brandon has the capabilities and

expertise to roll into the role with ease given he has worked on senior living projects for us in the past. Brandon is also currently working on publicly funded projects such as the Town of Mukwonago - Town Hall and Police Station Remodeling, the City of Kenosha Public Library Uptown Lofts remodeling, and the Friends of Lapham Peak New Lodge project. All of which have different funding and tracking protocols in place.

ALTIUS BUILDING COMPANY

COMMITMENT & INVOLVEMENT ALLOCATION MATRIX



	Preconstruction	Bidding	Construction	Closeout
Scott Drees President & CEO	15%	10%	10%	10%
Andy Klimpel Project Principal & Senior Project Manager	30%	40%	50%	
Eric Larson Project Superintendent	5%	5%	100%	25%
Project Engineer			100%	25%
Project Coordinator		5%	10%	5%



LASATA SENIOR LIVING CAMPUS

CBRF | CEDARBURG, WISCONSIN





March 14, 2024

Jason Wittek
Policy and Budget Analyst
Ozaukee County

RE: Lasata Senior Living Campus | Cedarburg, WI

Dear Jason,

Catalyst Construction is excited to provide qualifications for Construction Management as Advisor services for your campus expansion project in Cedarburg, WI. We have reviewed the project and understand the services that Lasata and Ozaukee County requires to complete it.

Our legacy of two decades in development, design, construction, and operations establishes our seasoned experts as your dream-realizing partners. Drawing insights from numerous historical projects, we meticulously forge proformas and project budgets, erecting a solid foundation for your project. This effort blends experience and innovation, crafting your vision with unparalleled precision.

Catalyst has assigned our Preconstruction and Project Executive, Ryan Raskin to the Lasata Senior Living project. During his tenure, Ryan consistently demonstrated exceptional skills, dedication, and a strong work ethic that greatly contributed to the success of Catalyst's projects. He has extensive experience in the public sector as well as senior living communities. Ryan will be your single point of contact and main coordinator at Catalyst Construction. I am confident that Ryan will be a valuable asset to your project bringing not only his technical proficiency but also his positive attitude and commitment to excellence.

I feel that Catalyst Construction is the best solution for Lasata Senior Living, and you have my personal commitment of our preconstruction, construction, and monitoring abilities to further enhance your building experience.

Thank you for the opportunity to provide our services. Please feel free to contact me at (414) 333-1111 with any questions.

Sincerely,

Matthew M. Burow
CEO | Chairman



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Attachment: Catalyst_Lasata Senior Living - Ozaukee County



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DESCRIPTION + HISTORY

Catalyst Construction was founded in 2004 by Matt Burow in Milwaukee, Wisconsin. After working for another construction firm Matt realized that there was a better way to help businesses grow and expand without the constraints of union/non-union contracts. Thus, Catalyst was created as a pure construction management firm with no self-performing workforce. We are proud to say that we have perfected the construction management model to the point that over 95% of our work comes from repeat and referral clients. Catalyst reached a volume of \$265 million in 2023 and is projecting \$295 million for this year.

Our non self-perform business model was developed to ensure owners receive competitive bids in all categories without conflicting interests among our "self-perform" trades. This allows Catalyst to receive and select from a substantial number of bids in all work categories from both union and non-union trades.

Catalyst has a vast amount of experience in senior living construction. The educational and professional background of our staff members collectively includes nearly a millennia of experience in civil engineering, building construction and management, and environmental policy. This experience helps provide value from the very first estimate, into construction, and through project closeout. Our Team knows the best systems, subcontractors, and delivery methods to maximize our clients value.



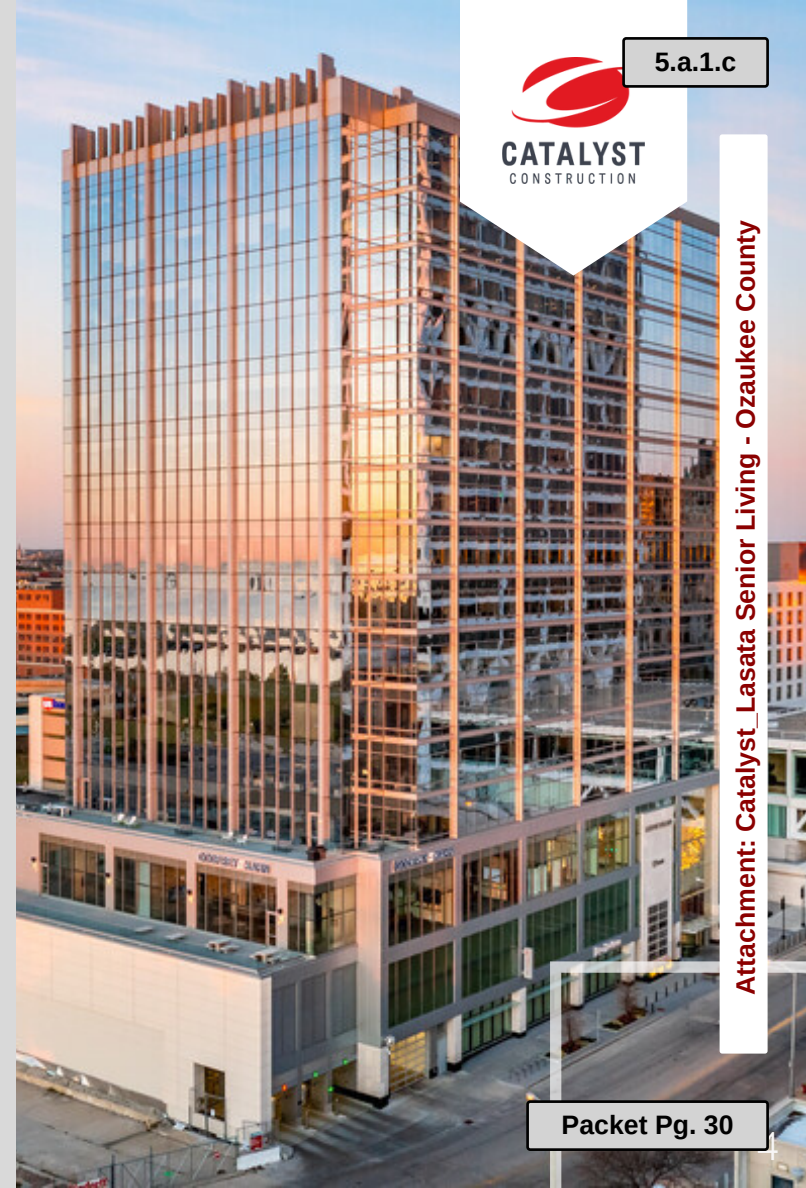
WATCH OUR VIDEO

CatCon, Inc. dba Catalyst Construction
833 East Michigan Street
Suite 1000
Milwaukee, WI 53202

Contact: Ryan Raskin
rraskin@catalystdevelops.com



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Attachment: Catalyst Lasata Senior Living - Ozaukee County

Packet Pg. 30



BUDGET PROCESS & NARRATIVE

Catalyst's budgeting process is comprehensive and creative. We pride ourselves on having the most up-to-date pricing data in the industry because we build so many commercial projects, in different municipalities, with various structural systems,

Catalyst's preconstruction team has an unparalleled amount of data to help bring the Lasata Senior Living project in, on or under budget. Our massive amount of commercial data is used at the earliest estimate levels and throughout the estimating process to ensure accuracy.

Our typical process includes doing all quantification internally with our estimating department that includes seven dedicated estimating professionals. We then use our internal quantities and historical unit pricing to provide detailed estimates at every design milestone.

VALUE MANAGEMENT



Catalyst Construction believes that the best way to reduce project cost and find the best project value is during the early portion of the Design / Preconstruction Phase.

We use a Scope Adjustment Log (SAL) to outline pricing options and track overall budget. This allows us to question the Architect and Design Team. Catalyst feels it is our responsibility to respectfully challenge any of the preconceived ideas in the current design to ensure maximum value is being provided in the design. The advantages to the current situation is that the Lasata Senior Living Building Team has a clear and complete understanding of their needs and desires for this project and that the design team has incorporated all the program ideas into the documents. The layout of the building, its special design features, and its connectivity to existing spaces ensures that the drawing review process will be comprehensive.

The Scope Adjustment Log, whether implemented during the finalization of the Design Development documents or after bids are received, is a great way to track both scope enhancements and cost saving potential during subsequent months. The SAL allows for the Lasata Senior Living Team to understand the cost impacts of each idea, allows the design team to weigh in on the design impacts, and then creates a living document for each stakeholder's reference detailing why and when a decision was made. The Scope Adjustment Log is one of the most valuable tools used in matching cost limitations against design expectations.

QUALITY ASSURANCE / QUALITY CONTROL & DOCUMENTATION

Catalyst believes in the importance of preplanning and maintaining the highest level of quality for all of the projects that we undertake. Standard processes for all projects include pre-installation meetings for all major facets of work. During the pre-installation meetings all shop drawings, construction documents, and project expectations are identified and reviewed before any work commences to ensure the highest quality workmanship top to bottom. These materials and information are shared with all contractors involved in order to guarantee that the proper construction materials and sequencing are appropriately coordinated keeping in check the aesthetics of the installation as well as the maintenance and life of the building.



SCHEDULING

Catalyst Construction establishes a detailed construction schedule at the onset of each project. The schedule will serve as the basis for all construction coordination activities. During the Preconstruction Phase, the schedule will include the Design phases and subsequent budget checks. We will track the Public Bidding Timeline and subsequent approval process with the County Board. The schedule will again be updated when construction documents are completed and ready for bidding. The schedule will become part of the supplemental information that Catalyst provides to all bidders.

After Prime Contracts have been awarded, but before construction begins, Catalyst will plan a Pull Planning session with all contractors. Catalyst uses this Lean Principle to ensure that the schedule is being maximized and that any float is being driven out of the schedule with full subcontractor input.

During construction, the project manager and superintendent aggressively manage the activities and oversee sequencing of on-site operations, consistently and vigilantly holding subcontractors accountable. Steve will provide a continually updated four week look-ahead schedule with all trades, ensuring that the minute details are coordinated to allow the overall schedule to be maintained. The project manager will take the lead in managing the overall construction schedule and communicating milestones and major accomplishments to the Lasata Senior Living Team. Catalyst has extensive experience working in and around occupied spaces, and will coordinate heavily with the end user and tasks that can and can't be done during normal business hours. This coordination with the end user is key in ensuring a successful overall project.

Taken collectively, schedule development, project scheduling, and pull planning are utilized to establish an overarching project schedule against which the timing and execution of the project should be measured.

PROGRESS REPORTS

Catalyst Construction will report to the appropriate committee and board members on a monthly basis. Ryan's understanding and experience with Ozaukee County on past projects provides us with the knowledge of what the county expects. In addition, our team will communicate with the Lasata Leadership team on a daily basis and include them in the weekly on-site meetings. Catalyst reports will include progress updates, schedule comparisons, financial management, change order reviews and approvals, and any pending issues.



SAMPLE MONTHLY REPORT

Via Email
May 24, 20XX
XX
XX
XX
XX

RE: Draw #3 Review - Inspection #2
Dear Mr./Mrs. XX:

On May 24, 20XX Catalyst visited the referenced site for the primary purpose of verifying Draw #3 for the period through April 30, 20XX. A site walk of was conducted through the project area to review the site and building improvements. A review of the AIA C702 C703 pay application #3 prepared by XX and C703 draw #3 prepared by XX was conducted. A summary of the review, observations made during the job walk and progress photos for draw #3 are included below.

I. Construction Progress

A. Site Improvements and General Conditions

The site is clean and orderly. Fencing, erosion control and privacy screen (branded XX) are intact at the perimeter of the site. The neighborhood around the site is also clean. Both retention ponds (rain gardens) have been excavated and are functional at draining the excess water from site. A gravel track pad is being utilized at the entrance to remove excess dirt from trucks leaving the site. The jobsite trailer has been occupied. Several other contractors have equipment, materials and trailers stored onsite. A large pile of black dirt and concrete from the school remain stockpiled on the northwest side of the site.

The entire site has been rough graded. The storm and sanitary line that tie into the existing lines under XX did have been completed and the road has been patched back. Site roads remain clear and navigable at this time. Due to the clay and sand soil composition, any precipitation decreases the ease of mobility. The three existing trees at the east side of site remain intact. Pumps have been placed in the large building excavations to dewater the forms and areas receiving waterproofing.

Draw #3 includes general conditions costs of XX site and structural demolition costs of and earthwork costs of XX.

Construction Progress (continued)

Item	Description	Completion
1	The installation of the clubhouse has been completed. Footings and foundation walls have been poured and shored.	Upcoming
2	The underground plumbing systems for the clubhouse and the pool are in progress.	Upcoming
3	The underground plumbing systems for the clubhouse and the pool are in progress.	Upcoming
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Catalyst Construction | (414) 727-6840 | www.catalystbuilds.com

DOCUMENT MANAGEMENT



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Attachment: Catalyst_Lasata Senior Living - Ozaukee County

PROCORE PROJECT MANAGEMENT SOFTWARE

Catalyst Construction utilizes Procore as our central hub for all construction related documentation and communication. This software system houses all issued construction documents, specifications, addendums and construction bulletins, but also serves as our project management software system. Our project managers keep their meeting minutes, RFI Logs, Change Order Logs and submittal information on the cloud-based site as well.

This software can be a valuable tool to the entire project team, including you as the client. All project participants are given access to the project on this system, and can view all pieces of information at any time on their end. Procore serves as a great collaboration tool for the entire team to use throughout the project.

In addition to Procore, we will hold weekly or bi-weekly construction meetings that will highlight all aspects of the project. In each meeting, the Project Manager will review outstanding submittals and RFI's, potential change orders and the upcoming construction schedule and activities. All this information will be summarized in easy-to-read logs and spreadsheets, so that the client is kept up to date on the current status of the project and all related information.





5.a.1.c

RELATED EXPERIENCE

LUMIA SENIOR LIVING DEVELOPMENT

Lumia in Mequon is a new 61,000 sq. ft. senior living development that includes independent and assisted living. The facility will also include a variety of amenities and space with activities such as bocce court, club room, salon, and wellness suite. This project is collaboration with Matter Development as the owners rep.

"Mequon seniors want boutique-level quality with the highest supportive care in a dignified and elevated setting, and their adult children feel strongly about locations closely linked to their daily lives and routines, so this is an important project that meets the market," said Aaron Matter, chief executive officer of Matter Development.



Owner & Location

Matter Development
11900 N Port Washington Rd,
Mequon, WI 53092



Architect

Plunkett Raysich Architects, LLP
333 E Chicago Street #1
Milwaukee, WI 53202



Schedule

Estimated Completion: 2023

RELATED EXPERIENCE

LUTHERAN HOME | ELAINE'S HOPE

Catalyst Construction completed Elaine's Hope: the new 45,000-square-foot facility that is connected to the Lutheran Home campus. The facility includes a two-story 48-unit memory care building at the corner of West Meinecke Avenue and North 74th Street, a one-story 24-unit memory care building bordered by West Meinecke Avenue, and a one-story connector building that will include a lobby and community center. It also features the Potawatomi Welcome Center – a children's play area, reception area, staff offices, and community room.

**Owner & Location**

Lutheran Home: Elaine's Hope
7500 West North Avenue
Wauwatosa, WI 53213

**Architect**

Plunkett Raysich Architects
209 S Water St
Milwaukee, WI 53204

**Budget Information**

Project Costs: \$10,200,000

**Schedule**

Completion: January 2020





5.a.1.c

RELATED EXPERIENCE

EVIN AT OCONOMOWOC

Evin is a 123,000 square-foot senior living community with 80 residences. Evin Senior Care offers apartment residences for independent seniors, support services on-demand in homes, and a secure, memory care facility. Evin is new, wood-framed construction built into a hillside in Oconomowoc.

The Evin team has researched and installed a very safe hospital-grade air purification system that is used by both the University of Wisconsin Hospital and the Mayo Clinic. As an even greater air quality consideration, every apartment in the building has its own entirely separate HVAC system.



Owner & Location

Evin Senior Living
1101 Silver Lake St,
Oconomowoc, WI 53066



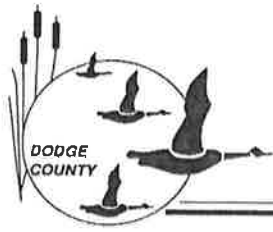
Architect

Thrive Architects
259 South Street, Suite A
Waukesha, WI 53186



Budget & Schedule

Project Costs: \$16,024,343
Completion Date: October 2020



Clearview

Ed Somers
Executive Director / Administrator

March 7, 2024

TO: Ozaukee County Administrator

RE: Letter of reference for Ryan Raskin

I have worked with Ryan Raskin as the construction manager on several projects over the last 18 years.

Fields of Washington County – \$3.5 Million, 24-unit Residential Care Apartment Complex, new construction with an umbilical connection to the existing Samaritan Health Center.

Samaritan Health Center and Fields CBRF - \$10 Million renovation of 228-bed Skilled Nursing Facility to 131-bed Skilled Nursing Facility with all private rooms and private bathrooms and 31-bed Community Based Residential Facility.

Shorehaven Campus Repositioning - \$38 Million project total. Included remodeling of lobbies, therapy gym, activity spaces, decks and dining areas of existing Skilled Nursing Facility and Assisted Living. New construction of 46-unit Catered Living Apartments with underground parking, bar/restaurant, movie-theater, fitness center with swimming pool, and lakefront pavilion.

Ryan was involved in all aspects of these projects beginning with design development, construction documents and bidding, all the way through to construction and project close-out. Ryan kept me, as well as all governing boards, informed every step of the way. Ryan always engaged in creative problem solving to ensure the best quality final product while being cognizant of budget restrictions and looking out for the owner's best interests. Ryan has extensive experience working on public projects and the extra level of scrutiny they face. Ryan has an excellent relationship with the Department of Health Services and is able to navigate the regulatory process. I would highly recommend Ryan Raskin for any construction project, public or private. Please feel free to reach out with any questions at the number listed below.

Sincerely,

Ed Somers
Executive Director/Administrator

198 County DF, Juneau, Wisconsin 53039
Telephone: (920) 386-3409 Facsimile: (920) 386-3405
esomers@co.dodge.wi.us

March 11, 2024

Re: Construction Management Services for Lasata CBRF
Ryan Raskin from Catalyst Construction

Personal Previous Experience with Mr. Raskin:

Lasata Crossings construction

Remodeling of Lasata Skilled Care Center

Cedarburg Fairgrounds Expo Center construction home of Milwaukee Curling Club

Cedarburg Fairgrounds Pavilion construction

Newport Shores Condominiums & Commercial Space in Port Washington

Northern Gateway/Mel's Village in Saukville (under construction)

Please accept this note as an unqualified letter of support for the CM services of Ryan Raskin. My experience with Ryan includes time that he managed the construction of a variety of various high profile and important building projects. His involvement included his previous work at Lasata and Ozaukee County Fairgrounds during my previous time as County Administrator. I was impressed with his management of the projects, especially in building the confidence and trust of the County Board, staff and project stakeholders including the family of the residents at Lasata and the Ag Board, 4H, and users of the Fairgrounds.

As President of Ansay Holdings LLC, I encouraged Ryan's/Catalyst involvement in two significant and game changing developments, Newport Shores redevelopment in Port Washington and Northern Gateway/Mel's Village in Saukville. Newport Shores has been an amazing project, with new housing units sold out and fresh commercial development on the near horizon with public access planned on the fourth story rooftop overlooking the lakefront. To date, the Saukville project has made tremendous progress, with Ryan managing the construction management role in a similar professional manner bringing immense value to the project.

I trust this affirmation for Ryan's professional skills will be helpful to Ozaukee County. Please feel free to contact me with any questions or concerns.

Best,

TM

Tom Meaux

Pres. Ansay Holdings LLC

Tom.meaux@ansay.com

262-689-2173



March 8, 2024

Jason Wittek
Policy & Budget Analyst
Ozaukee County

Recommendation for Catalyst Construction | Lasata CBRF Construction Management

Dear Jason Wittek,

I am pleased to write this letter of recommendation for Catalyst Construction based on their outstanding performance on our senior living project, Lumia Mequon. I had the opportunity to work closely with the Catalyst team from throughout the duration of the construction project.

Catalyst's attention to detail was evident in every phase of the project. From the architectural nuances to the incorporation of accessibility features, Catalyst Construction consistently demonstrated a commitment to delivering a facility that not only met but exceeded the expectations of our clients and Lumia residents.

Furthermore, I want to commend Catalyst for their effective communication and collaboration throughout the project. They were responsive to our concerns, proactive in addressing potential issues, and worked seamlessly with our team and other contractors involved in the project. This collaborative spirit significantly contributed to the overall success of the senior living facility.

In summary, I wholeheartedly recommend Catalyst Construction for the Lasata Senior Living construction project. Their expertise, attention to detail, and commitment to safety make them an ideal partner for projects that demand a high level of precision, consideration, and specialized knowledge.

If you have any questions or require additional information, please feel free to contact me at (414) 775-0857 or jford@threeleafdevelopment.com. I am confident that Catalyst Construction will bring the same level of excellence and dedication to the Lasata Senior Living project in Ozaukee County.

Sincerely,

John Ford, Chief Development Officer
Three Leaf Partners

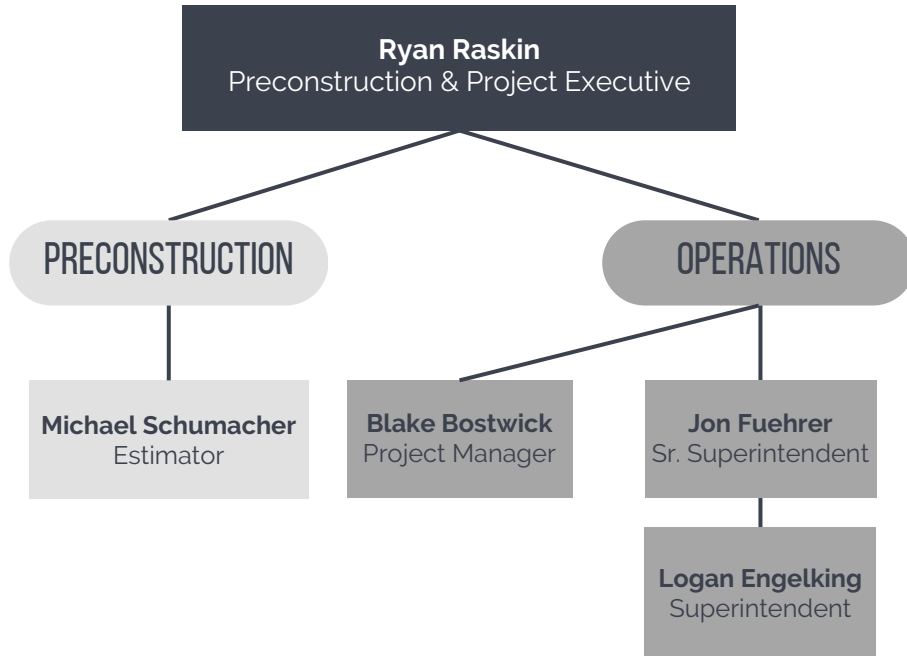
(414) 775-0857

threeleafdevelopment.com

jford@threeleafdevelopment.com

ORGANIZATIONAL CHART

PRIMARY PROJECT CONTACT



MEET TEAM LEADER, RYAN RASKIN!

Passionate about senior living developments, Ryan Raskin's role as a project manager has enabled him to forge robust client relationships across various communities.

Overseeing projects totaling over \$100 million for counties and municipalities has refined his resilience and strategic leadership abilities. Through his tenure managing projects in Ozaukee County, Ryan has gained invaluable experience in navigating challenges and emerging stronger.

As a resident of Ozaukee County, his dedication to the community propels him to ensure the success of projects like Lasata Senior Living. This fusion of professional expertise and personal commitment drives Ryan's pursuit of excellence in every facet of senior living development.



5.a.1.c



RYAN RASKIN

PRECONSTRUCTION
& PROJECT EXECUTIVE



SINCE
2020

CONTACT



(414) 303-9979



rraskin@catalystbuilds.com



Cedarburg, WI

EXPERTISE SKILLS

Senior Living Experience



Creativity + Critical Thinking



Cross-Departmental Experience



EDUCATION

University of Wisconsin | Stout
Bachelor Degree of Science |
Construction Management

LEED AP

BACKGROUND | JOB RESPONSIBILITY

Ryan joined Catalyst Construction in February of 2020 as a Senior Project Manager, bringing to the table more than twenty years of experience in the construction industry. He has since been promoted to Preconstruction & Project Executive. Prior to joining Catalyst, Ryan worked as a Vice President/Senior Project Manager at a large construction company in Wisconsin. Ryan's extensive operations and project management experience makes him particularly adept at understanding all phases of the construction process. His is responsible for the following:

- Estimating the project throughout the various phases of design
- Budget accuracy that is unmatched by quantifying and pricing at an extremely detailed level
- Transparent communication in the budget planning process
- Leading the bidding process

SENIOR LIVING WORK EXPERIENCE

Lasata Crossings | Assisted Living | Ozaukee County | \$10,000,000 | CM Agent
Ozaukee County Multi-Use Facility | Ozaukee County | \$8,000,000 | CM Agent
Lasata Skilled Nursing | Renovation | Ozaukee County | \$10,000,000 | CM Agent

The Fields of Washington County | RCAC | \$4,500,000 | CM Agent
The Samaritan Healthcare | Renovations & CBRF | Washington County
\$10,000,000 | CM Agent

UWWC | Science Wing Addition | Washington County | \$8,000,000 CM Agent
UWWC | Phase 2 | Washington County | \$3,000,000 | CM Agent
Cedarburg Public Library | City of Cedarburg | \$7,000,000 | CM Agent
Cedarburg Public Works | City of Cedarburg | \$6,500,000 | CM Agent
Howard Commons Phase 2 | W+Village of Howard | \$22,500,000 | CM Agent
Howard Commons Phase 2 | W+Village of Howard | \$10,000,000 | CM Agent
Harborchase of Shorewood | Assisted Living & CBRF | HRA | \$17,500,000 | CM at Risk
Shorehaven | Multiple Projects | Oconomowoc | \$25,000,000 | CM at Risk
Meadowmere | West Allis CBRF | Premiere Care Centers | \$2,000,000 | CM at Risk



BLAKE BOSTWICK

PROJECT
MANAGER



5.a.1.c

SINCE
2022

CONTACT



(414) 331-3199



bbostwick@catalystbuilds.com



Whitefish Bay, WI

EXPERTISE SKILLS

Communication



Attention to Detail



Successful Project Delivery



EDUCATION

Milwaukee School of Engineering,
Bachelor of Science | BS
Civil Engineering & Construction
Management Specialty

BACKGROUND | JOB RESPONSIBILITY

Blake joined Catalyst Construction in July 2022 as an Assistant Project Manager. Prior to joining Catalyst Construction, Blake worked as a Project Engineer at a large construction company in Wisconsin. Blake has exceptional leadership and communication skills, as well as knowledge and experience in the construction industry. At Catalyst, his responsibilities include contract writing, contract management, owner correspondence, submittals, scheduling, subcontractor management, punch-list and pre-close-out. Blake's work ensures that the project transitions smoothly from preconstruction to construction and that the construction phase is efficient, safe and remains in budget.

WORK EXPERIENCE

Lumia Senior Living | Mequon, WI
\$12.5 million 61,082sf New Assisted Living and Memory Care Facility

St. Matthew's Lutheran Church | Oconomowoc, WI
\$9.8 million Worship & Fellowship Hall and 6-Classroom School Addition

Milwaukee Rescue Mission Capital Renovations | Milwaukee, WI
Second Floor Dorm Renovations and Exterior Façade Upgrade

First Immanuel Lutheran Church & School | Cedarburg, WI
\$680,162 interior renovations

Fox River Christian Church | Waukesha, WI
\$1.4 million remodel of 33,670 sf building into Worship & Community space

Fox River Congregational Church | Pewaukee, WI
\$2 million 8,060 sf two-story classroom addition

The National | West Allis
\$50 million 247-unit multi-family complex

Packet Pg. 44



JON FUEHRER

SENIOR SUPERINTENDENT



SINCE 2016

CONTACT



(262) 689-2553



jfuehrer@catalystbuilds.com



Fredonia, WI

EXPERTISE SKILLS

Senior Living Experience



Organization



On-Site Experience



EDUCATION

OSHA 30 Hour Certification
Forklift Safety Certification
CPR & First Aid Certification

BACKGROUND | JOB RESPONSIBILITY

Prior to joining Catalyst Construction, Jon owned and operated a carpentry business and worked on many of Catalyst's projects as a subcontractor. Jon is a third generation union carpenter, has been exposed to construction most of his life, and has over 20 years of field experience. Soon after high school, he began his career as a carpenter working on residential/multi-unit, residential/light commercial projects. After a few short years, he was promoted to Foreman. Jon was hired at Catalyst Construction in 2016 as a project superintendent. He continued to go above and beyond job requirements and was named Catalyst's first Senior Superintendent.

Jon moved to commercial construction and worked for a large general contractor as a carpenter, learning all the components of commercial work. Jon enjoys all aspects of building/construction. He finds satisfaction in delivering a quality, timely, and organized project and enjoys meeting and working with everyone involved on the project.

SENIOR LIVING WORK EXPERIENCE

Lumia Mequon Assisted Living & Memory Care | Mequon, WI
Spero Gardens (Gardens of Hartford) | Hartford, WI
Lutheran Home Elaine's Hope Memory Care | Wauwatosa, WI
Evin Senior Living | Oconomowoc, WI
St. Ann Center Bucyrus Campus | Milwaukee, WI
Village Pointe Commons | Grafton, WI
Point Place Apartments (Senior) | Madison, WI
Azura Memory Care and Assisted Living | Verona, WI
Ascension Medical Clinic | Mequon, WI
Milwaukee Rehabilitation Hospital | Greenfield, WI
Orthopaedic Hospital of Wisconsin | Glendale, WI



LOGAN ENGELKING

PROJECT SUPERINTENDENT



5.a.1.c

SINCE 2019

CONTACT



(414) 331-4288



jlengelking@catalystbuilds.com



Sussex, WI

EXPERTISE SKILLS

Safety



Information Distribution



Subcontractor Coordination



EDUCATION

University of Wisconsin-Milwaukee |
B.S. Architecture

BACKGROUND | JOB RESPONSIBILITY

Logan joined Catalyst Construction in October 2019 as an Assistant Project Superintendent, bringing more than four years of experience in construction industry. Prior to joining Catalyst Construction, Logan was a student at UW-Milwaukee where he studied Architecture. While in school, Logan did an internship at Bielinski Homes where he was a drafting intern. Logan always strives for continuous improvement in any way possible and considers himself to be an independent decision maker and problem solver. His responsibilities include supporting the superintendent in assigned projects, gathering and distributing information to stakeholders and team, prepare and maintain RFI's, Provide Project Manager subcontract award recommendations.

WORK EXPERIENCE

Lakewood Baptist Church | Pewaukee, WI | \$5 million
St. Marcus Lutheran School | Harambee Campus | Milwaukee, WI | \$4.5 million
Trilogy Health | Brookfield, WI | \$75,000 tenant improvements
Brookfield Lakes Fitness Center | Brookfield, WI | \$193,000 fitness center
Crescent Crossing Apartments* | Oak Creek, WI | \$25.5 million
Teens Grow Greens | Milwaukee, WI
Lake Country Classical Academy
Brookfield Lakes Trilogy Health
Velo Village* | Franklin, WI
Woodnote Residences* | Hartland, WI
Ascension Mequon* | Mequon, WI
First Immanuel Lutheran Church* | Cedarburg, WI
*Worked as Assistant Project Superintendent

THANK YOU!



FEEL HEARD & REASSURED

We seek to understand what you envision and want. We ask what your desires are, as opposed to us telling you what you need. We are aware that you're paying for expertise so as the client you want the builder to give solid advice and guide you creatively through the process.



WE ARE THERE ALL THE WAY

We will feel more like a partner rather than a vendor. Believe it or not but we're not interested in winning this job for a payday, but more that we genuinely want to be your partner for the sake of what you're bringing to the community.



INNOVATIVE THINKING

All the best laid plans in the world for building an attractive and functional building don't mean much if you don't have the right partners in place. With you hitting off with this first project you need an ally who sees things with a fresh eye and helps problem solve issues before you know there is one.



SYNTHESIS OF FORM & FUNCTION

The design phase can be the Achilles heel. Our proven experience, network, and collaborative efforts streamline the construction process, which inevitably reduces the number of unexpected change orders and design contingencies. Design has to balance form and function but also balances your businesses past, present, and future.



Website
catalystbuilds.com



Ryan's Phone
(414) 207-0489



Ryan's Email Address
rraskin@catalystbuilds.com

OZAUKEE COUNTY

LASATA SENIOR LIVING CBRF

CEDARBURG, WI

CONSTRUCTION MANAGEMENT AS ADVISOR PROPOSAL



GREENFIRE
BUILDERS OF THE FUTURE





OZAUKEE COUNTY

CONSTRUCTION MANAGEMENT AS ADVISOR SERVICES PROPOSAL FOR LASATA SENIOR LIVING CBRF

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SECTION 2 - PROJECT SCOPE STATEMENT

SECTION 3 - PROJECT WORK PLAN

SECTION 4 - PROPOSER'S PROFILE

SECTION 5 - PROJECT TEAM STATEMENT

March 14, 2024

Jason Wittek
Ozaukee County
jwittek@ozaukeecounty.gov

RE: Ozaukee County
Lasata Senior Living CBRF
Construction Management as Advisor Services Proposal



Dear Mr. Wittek,

On behalf of Greenfire Management Services (Greenfire), we offer the enclosed proposal for construction management as advisor services for the expansion of the Lasata Senior Living Campus to include a new community based residential facility for Ozaukee County. We aim to add value through our expertise and proven record of success to support the construction of the new CBRF that will enhance the continuum of care to the seniors and current residents of the Lasata Senior Living Campus who desire to transition to assisted living and memory care.

In addition to our sealed fee, we are providing our project understanding and insight into our process. We'll highlight how our greatest asset – our people – provide exceptional value from our detailed approach and transparent communication through all phases of your project. Our methods and proven experience make us the optimal construction partner.

At Greenfire, we do not self-perform trades; instead, we competitively bid the trade work to ensure full market competitiveness and transparency. Our preconstruction team pre-qualifies each bidder based on rigorous criteria, including quality, experience, stability, and capabilities. We collaborate with contractors who consistently deliver quality work.

Acting as CMaA for Ozaukee County, we will take lead on all construction meetings and act on behalf of the County's best interests, as well as handle all change order requests and provide project updates. Our team communicates clear quality expectations from project kickoff to completion.

As a 100% minority-owned enterprise, Greenfire exists to support sustainability and opportunities for the Forest County Potawatomi Community. We do not take this responsibility lightly and are proud to represent our parent company – Potawatomi Ventures. For this reason, our integrity and commitment to quality are paramount.

I certify that the information and data submitted herein is true and complete to the best of my knowledge. Greenfire also confirms receipt and acknowledges Addendum #1 sent March 8, 2024.

We eagerly look forward to continuing this process with you, and further conversations regarding this important project for the betterment of Ozaukee County

Sincerely,

Jeb Meier, President
jeb.meier@greenfire.com | (414) 290-9403

Attachment: Greenfire CMaA Services Proposal Ozaukee County CBRF (Construction Manager as Advisor Services for the Community-Based

PROJECT SCOPE STATEMENT

In the following proposal, Greenfire Management Services (Greenfire) offers Construction Manager as Advisor (CMaA) services towards the expansion of Ozaukee County's current Lasata Senior Living campus with an additional 18,000 SF, 24-bedroom facility.

Ozaukee County has proposed building a Community Based Residential Facility (CBRF) to be within the Lasata Senior Living Campus, adjacent and connected to the Lasata Care Center located at W76 N677, N. Wauwatosa Rd, Cedarburg, WI 53012. Ozaukee County has budgeted \$4.5 million to complete construction of this project. Proposed construction of the new CBRF is to include private resident bedrooms, support service spaces, and resident amenity spaces. The design incorporates ADA standards for all rooms. Federal funding is provided by American Rescue Plan Act (ARPA) funding provided to Ozaukee County.

SCOPE OF SERVICES

Greenfire will act as a third-party, non-self-performing Construction Manager as Advisor (CMaA) and act as a representative of Ozaukee County. During the preconstruction phase, Greenfire will provide cost estimates, schedule and assist in value engineering in conjunction with the design team.

Once construction begins, Greenfire will run point on all construction progress meetings, and document meeting minutes. Greenfire will work on the County's behalf and advise the County on all change order requests. Greenfire will provide the project with a team including a full-time on-site Superintendent during the duration of the project.

IDENTIFYING PROJECT SUCCESS FACTORS

The beginning of any project may be one of the most exciting periods of the build and Greenfire believes that it is also one of the most crucial. Our approach begins with identifying critical success factors. As an example, these factors could include: budget, schedule, and/or quality. This process establishes goals and objectives that decisions will be based on throughout the project. We will periodically check in and ensure we are meeting expectations and achieving your satisfaction.

We believe that teamwork is the overarching aspect that identifies these factors and drives all other project components. While our project team serves as the spearhead, there are other stakeholders, partners, and factors that all need to work interdependently to achieve each factor. Teamwork is what facilitates a collaborative approach and accounts for all particulars which affect progress. Working together as one team accounts for seamless coordination and transition between preconstruction and construction phases.

PRECONSTRUCTION CAPABILITIES

During the preconstruction phase, we thoroughly evaluate a number of factors. Our experienced team listens to you and asks the right questions and presents the right information. Our unparalleled preconstruction team possesses sufficient resources to proactively monitor market conditions and provide real-time information during the design process when critical decisions are made. We also present a transparent and collaborative approach that allows for owner involvement at every stage of the project to ensure total project understanding. We provide the following expertise and services to benefit your project:

PRECONSTRUCTION SERVICES

- **Budget Development**
- **Conceptual & Detailed Estimating**
- **Scheduling**
- **Design Package Support**
- **Constructability Review**
- **Value Engineering Analysis**
- **Building Systems & Materials Analysis**
- **Logistics & Phasing Evaluation**
- **Disruption Avoidance Planning**
- **Contractor Prequalification**
- **Permitting Coordination**

PRECONSTRUCTION PROCESS

Starting with early conceptual design drawings, the Greenfire preconstruction team produces detailed estimates that communicate all assumptions made well in advance of the final design. Producing estimates with this level of detail requires significant experience with similar projects and sufficient resources.

The vast experience of our preconstruction team also helps identify critical variables early in the design stage. Proper allowances and contingencies can be carried until due diligence and design are complete.

COST ESTIMATING & CONTROL

Greenfire provides detailed estimates demonstrating our transparent and open-book approach. Understanding cost allocation means active owner participation in the design process to make informed decisions. This organized and detailed estimating approach grants continuous value engineering throughout the design process. We also provide a Project Options Log which is a useful tool to track alternates as well as estimate adjustments between the typical intervals (Schematic Design, Design Development, etc.). Our approach includes options to engage the owner to identify the project's most important needs. Early engagement of our deep contractor network at this time clarifies any potential costs and alternative risks. Headed by Greenfire's estimating team serving as the primary point of contact to identify areas of adjustment with support from the project manager.

DRAWING AND SPECIFICATION REVIEW

Our Quality Assurance program begins on the front end with our preconstruction department. At project onset, we involve our preconstruction team early to meet with the owner to identify the project's needs. Once the scope is verified to meet project needs, we work with the architect to review the drawings and specifications.



QUALITY CONTROL

The on-site Greenfire project team enlists our uniquely developed Total Quality Management Program with the intent to promote the highest quality standards in construction, and ensure the project is completed on time and within budget without accidents or safety incidents. The program requires the Greenfire project team to engage all vested parties to ensure all team members, activities, and craftsmanship adhere to the highest quality standards at the lowest possible cost.

The Greenfire Total Quality Management Program is executed by our on-site project team through a series of custom created checklists to verify every trade's work before moving onto the next trade. We have quality checklists in PROCORE that are created using the plans and specification for each scope of work to ensure all details are met. Greenfire superintendents inspect each area using these checklists as soon as work is complete.

SITE LOGISTICS

Coordinated at the onset of preconstruction, the site logistics plan establishes site planning, execution, and control of material procurement, transport and delivery of materials and other resources. Our preconstruction and operations teams work in sync to develop and implement an efficient plan. It is our goal to plan the site to allow for a clean, safe, and productive job site. In order to do so, we need to evaluate the site for constraints and property permissions. Maintaining an open communication line between owner, architect, future tenants, contractors, vendors, and local municipalities is critical at this junction. In doing so, our team establishes the most efficient plan to coordinate to minimize disruptions and maintain a positive view of the development.

SCHEDULING

During the preconstruction phase, we will develop a project schedule based on project goals and anticipated activities like procurement and weather conditions. We will provide the schedule to the owner and upon approval distribute to the entire project team. The schedule will include all design, preconstruction and construction activities.

The schedule is constantly monitored by our team using the overall project schedule which is verified by on-site pull-planning meetings with all contractors. The pull-planning meetings hold

TOTAL QUALITY MANAGEMENT PROCESS

- Drawing and specification review
- Design constructability analysis
- Materiality cost and product data analysis
- On-going and proactive cost management
- Site logistics construction and safety analysis
- Maintain proactive management approach
- Have a plan
- Know what is to be built
- Ensure the right materials and equipment are available
- Possess the appropriate amount of qualified workers
- Maintain quality in construction
- Do It Right The First Time



accountability and ensure buy-in from all trade partners. We also issue a 3-week lookahead schedule that gives an overview and detailed expectation for each respective trade duration, respectively.

By using this approach, all contractors take an active role in schedule creation which allows us to minimize unnecessary float and recognize constraints as early as possible. This process also creates a sense of accountability which further ingrains a sense of responsibility in the project team to maintain the original schedule.

SAFETY

At the onset of construction, Greenfire creates a detailed site-specific safety plan. The Greenfire Safety Plan embodies the policies and procedures set forth towards prevention of injury, property damage, fire damage, occupational illness, as well as CDC-recommended virus protection. It is a proven method with proven results. In addition, our team members perform daily safety checks and verify all activities conform to OSHA and governing agency requirements.

PROJECT COMMUNICATION & UPDATES

Greenfire's commitment to transparency and accountability is evident in its weekly project review report. Each week, the project team distributes a comprehensive report (shown on the right) via email to the owner, project stakeholders, and Greenfire's leadership team.

This report, presented in an easily accessible PDF format, serves as a comprehensive overview of project activities and milestones. High-level financial updates and tracking provide stakeholders with a clear understanding of the project's financial status.

The milestone recap offers insight into the project's progress, helping to maintain alignment with established timelines.

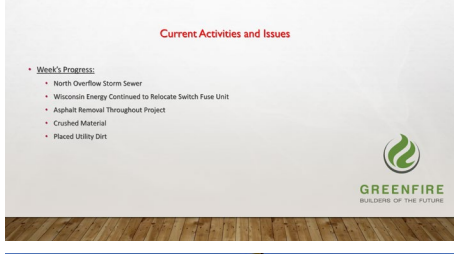
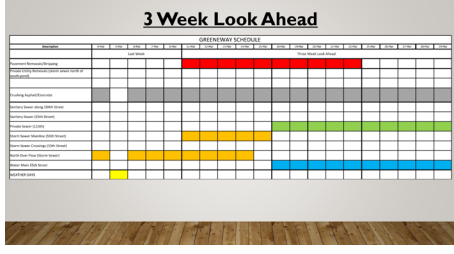
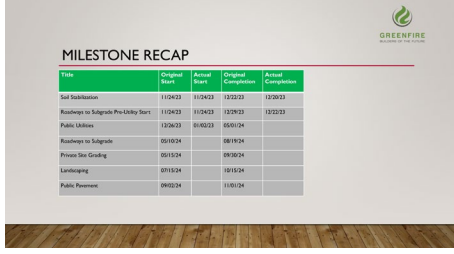
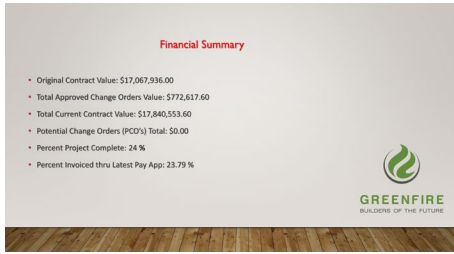
The three-week look ahead provides a proactive approach by offering a glimpse into future operations at the site. The report allows open dialogue, ensuring that all current activities, milestones, and project-related concerns are addressed promptly.

Photographs taken by the project team offer a visual representation of project progress.

Per the AIA-C132 we will comply with Section 3.3.21.2 for monthly reporting to the owner.

When we receive requests for information these are logged in our meeting minutes and discussed at weekly OAC meetings. Value engineering decisions are recorded in our Value Options Log (VOL). Those logs are a running list of items that have alternative recommendations based on cost, availability and/or performance. We make the recommendations, discuss the options and record the decisions in the VOL. All design change decisions will be documented in meeting minutes from weekly OAC meetings. It is crucial that all team members are well informed and understand any changes and the implications of those changes.

We document meetings through agendas and meeting minutes. If project discussions happen via phone or face-to-face, our project team will document and follow-up via email so that there is clear communication and understanding.



WEEKLY REPORT
A weekly email is sent out with a slideshow PDF to all stakeholders & project leadership.

FINANCIAL SUMMARY
Tracking updates on high level figures, as well as noting of change orders and project completion.

MILESTONE RECAP
Metrics of project milestones and target completion dates vs. actual completion.

THREE WEEK LOOK AHEAD
A Project Gantt Chart is provided to give glimpse into high level items upcoming in the weeks ahead.

PROJECT UPDATES AND NOTES
An opportunity is provided for the team to discuss the current week's activities, milestones and issues pertaining to the project.

PROJECT PHOTOS
Great emphasis is placed on comprehensive documentation photos of all stages of the project.

SAMPLE PROJECT OPTIONS LOG

A Project Options Log (sample shown below) is created during the preconstruction phase. It serves as a valuable tool for monitoring alternates and estimating adjustments throughout key project stages like Schematic Design and Design Development. Our strategy is to have owner involvement to make informed decisions. These options are communicated to the project team and should be reflected in the construction documents.

Sample Project

= Further Action Req'd

= New Information



GREENFIRE

BUILDERS OF THE FUTURE

March 14, 2024

Project Options Log / Cost Control Log

Description	Pending Adds	Pending Deducts	Accepted	Rejected	Comments
0002 Bridge Construction 0002a Option A per Slingshot Design Directive 0002b Option B per Slingshot Design Directive 0002b1 Shorten the span of option B by 10 linear feet 0004 Eliminate irregular, custom built balconies at building ends, including loose glass railings provided by Option B204, and provide prefabricated rectangular balconies (10' x 6').			(\$141,052) (\$73,360)	(\$121,167) (\$18,560)	
A100 Foundations A101 Option to consider designing a structural slab at the slab on grade, in lieu of providing a conventional slab on grade condition (5" slab) with Rammed Aggregate Pier support included at the floor slab in roughly a 10'x10' grid.				TBD	Estimate Cost for RAP Slab Support is \$120,000, but these appears to conceptually add cost to the project.
B100 Structure B101 Option to re-evaluate sheathing material at exterior walls, with DD plans calling for DensGlass sheathing and outboard insulation. Is insulated zip sheathing possible?					Zip and DensGlass Gold with Tyvek are = DensElement liquid barrier incurs ~\$6.50/SF Add Insulated Zip-R9 incurs ~\$7/SF Add
B101a Provide insulated zip sheathing in lieu of DensGlass Gold with Tyvek weather barrier			\$212,909		
B101b Eliminate the furring/insulation scope provided by the siding contractor. Only possible by eliminating the DensGlass sheathing, which requires the use of a furring system.			(\$325,641)		
B101c Provide spray applied air and vapor barrier at all masonry veneer locations.			\$29,953		
B102 Provide stair shafts as wood framed/drywall construction, in lieu of providing masonry shafts throughout.			(\$55,121)		Through the DD estimate, we appeared to already eliminate the metal guardrail shown at the interior of the stairs in favor of wall-mounted handrails.
B200 Exterior Enclosure B201 At MP#1 and MP#2, provide Morin Metal Panels in 24 GA Metal Panel in lieu of 22 GA metal. To remain a solid color (Regal White) and same panel/fastener style. B203 Provide full view Thermatru patio doors (6/0 x 8/0) with an aluminum clad jamb and ADA bronze sill in lieu of Marvin Ultimate patio doors. B204 Option to eliminate perforated patio screens at the large, custom balconies. No privacy screens or metal fabbed window openings would be provided, but the balcony railing would extend the whole perimeter.				(\$13,626) (\$12,206) (\$113,906)	* Merge Comment - Work with Kulps during CD's to refine cladding specification * Merge Comment - Slingshot to mock-up option for custom perforated panels as public art to sell to the city to satisfy the public art requirement
	\$80,000	(\$76,774)	(\$1,883,684)	(\$1,137,500)	

Previous Base Estimate - (DD Estimate_2023.07.28)

Current Accepted

Adjusted Total w/ Current Accepted

\$22,113,108

(\$1,883,684)

\$20,229,424

\$20,000,000

(\$229,424)

Target Budget

Variance to Budget (Over)/Under

Page 1 of 2

What sets Greenfire apart is our exceptionally detailed and thorough preconstruction process. This front-end due diligence provides a seamless transition to construction and final occupancy, as outlined in the following approach.

The Greenfire approach focuses on three key elements throughout the project:

- **Schedule / Communication**
- **Cost**
- **Construction Quality**



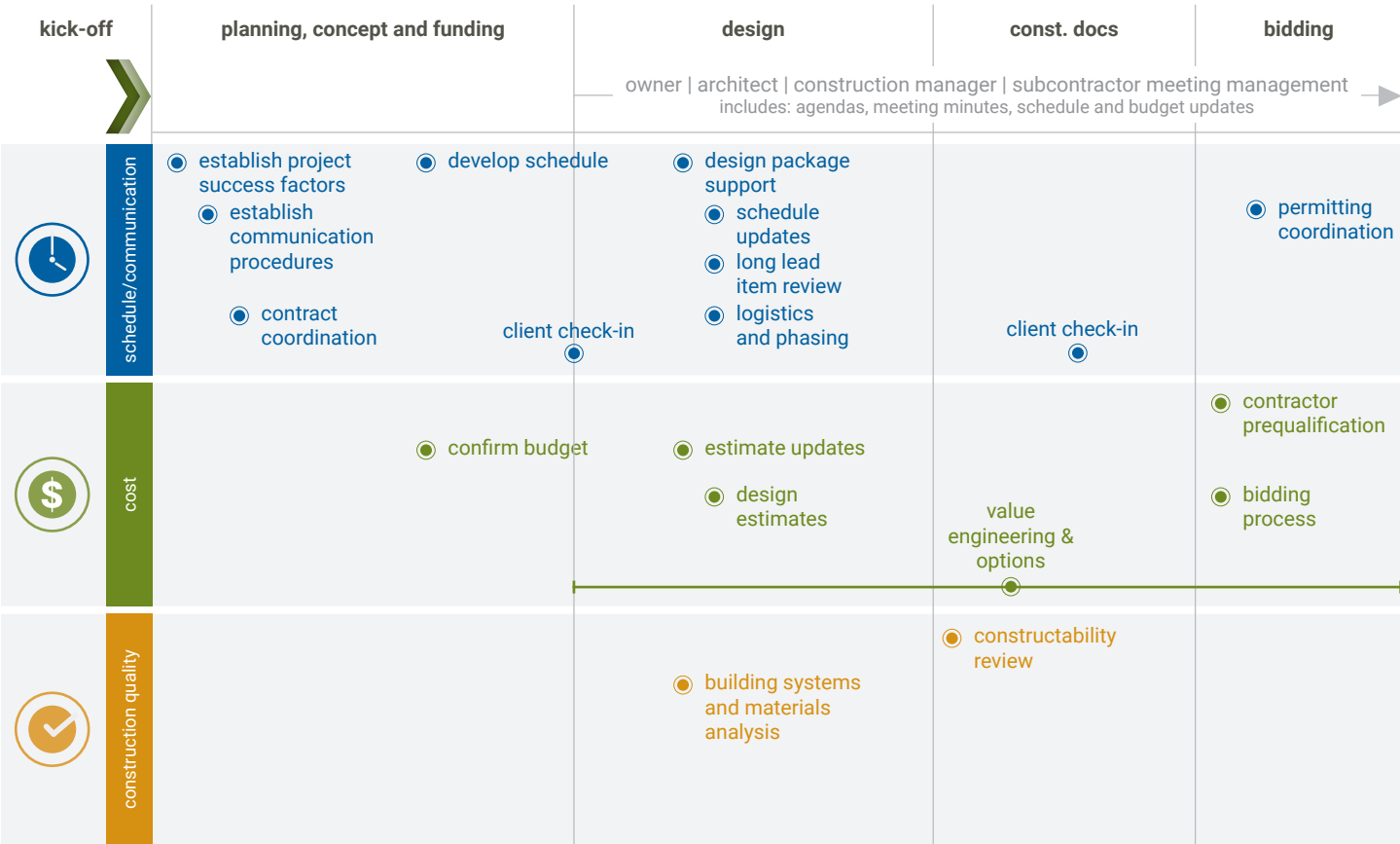
These three factors are reviewed on an ongoing basis to make sure the project is successful every step of the way. If one of the elements becomes misaligned, we regroup and get the project back on track.

We start the process by working with you to identify the critical success factors. These factors become the basis of every decision and are the measure of success at the end of the project. When the project ends, the relationship carries on.

We work with the design team while leveraging our strong relationships with a vast network of qualified contractors to continually assess value engineering analysis at every interval of the design phase. We also keep your team informed and involved in decision making so you can see all alternatives and innovative solutions.

We will work with the county and design team to bid the work to prime contractor(s). The Greenfire contractor qualification process is rigorous. We evaluate the quality, price and workforce availability of each of our subs so that you are getting the best value for your project.

Once the bids are awarded, the project begins with continuous oversight and communication from our construction team. You also have support from Greenfire including marketing and public relations throughout the project.

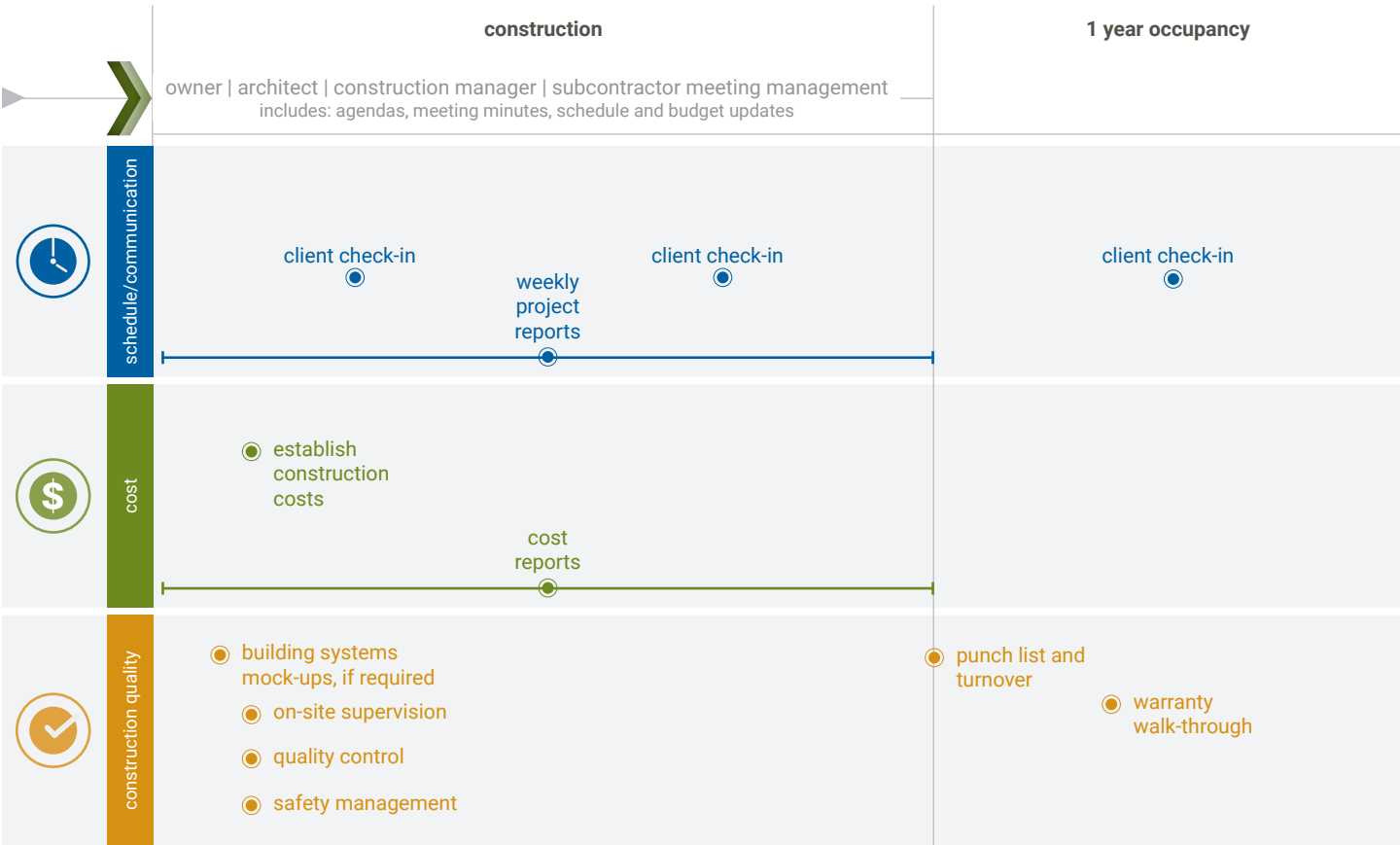


The keys to our successful approach are open communication, full transparency and quality construction solutions. One of our biggest differentiators is the amount of upfront planning and collaboration - a proactive approach vs. reactive approach. Most contractors get involved when the shovel hits the ground; Greenfire gets involved much earlier. Greenfire sets the tone for the project by thoroughly documenting and managing project meeting minutes, with rigorous documentation of project updates, value engineering options and design change orders. By utilizing industry leading software such as Pantera, Microsoft Project, ViewPoint and PROCORE, we can provide all project partners and team members transparent and real-time updates.

This level of project management ensures a smooth transition from preconstruction to construction. Throughout the project, we provide the right information at the right time to minimize surprises. Our approach, illustrated here, shows the many value-added services Greenfire provides to its clients from groundbreaking through the grand opening and beyond.

Our Total Quality Management Process also sees a project through closeout. The Closeout Process ensures the owner understanding and operation of the new facility via multiple sessions of on-site hands-on training for building systems and equipment. The process commences at 50% completion through closeout and turnover, and if required, beyond completion of construction.

- Project Closeout Procedures at 50% completion
- Project Closeout Meeting agenda via PROCORE
- Punchlist development via PROCORE
- Owner Training Project Turnover
- Compilation of O&M Manuals
- Review Closeout Plan & Checklist
- Weekly Check-ins to ensure Closeout Procedures
- Successful Project Closeout and Turnover



LEGAL ENTITY NAME

Greenfire Management Services, LLC

YEAR FOUNDED

2010

TYPE OF CORPORATION

Limited Liability Company

Tax ID: 27-2804812

DUNS: 068780866

OWNERSHIP

Potawatomi Ventures

Kip Ritchie, CEO

Paul F. Hoesly, CFO

Jeff Johnson, COO

DECISION MAKING CONTACT

Jeb Meier, PE, CPE, LEED AP

President

D: (414) 290-9403

C: (414) 801-1028

jeb.meier@greenfire.com

www.greenfire.com

GREENFIRE OFFICES

Milwaukee Headquarters
3215 W. State St., Suite 200
Milwaukee, WI 53208

Wausau Office
301 N. 17th Ave., Suite 100
Wausau, WI 54401

CERTIFICATIONS

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
Minority-Owned Business Enterprise
NATIONAL MINORITY SUPPLIER DEVELOPMENT
COUNCIL (NMSDC)
Certified Diverse Supplier

SERVICES

Preconstruction
Construction

2023 EXPERIENCE MODIFIER RATING
0.77

NAICS CODES:

236115, 236116, 236117, 236118,
236220, 541330, 541990

FINANCIALS

Bonding Capacity: \$200 Million

ABOUT GREENFIRE

Greenfire Management Services, LLC is a construction management company headquartered in Milwaukee, complemented by a regional office in Wausau, WI. Established in 2010, Greenfire is a wholly-owned entity of Potawatomi Ventures, which serves as the investment arm of the Forest County Potawatomi Community (FCPC). In recognition of its status, Greenfire holds certification as a Minority Business Enterprise (MBE) with the State of Wisconsin. We are proud of our team of highly skilled construction professionals, each with a wealth of experience across various markets. Together, we have fostered a culture of excellence and integrity that gives Greenfire a distinctive edge. By leveraging this advantage, we ensure our clients receive optimal value, unparalleled quality, and the safest practices while achieving optimized value.

As a testament to our commitment and accomplishments, Greenfire was honored by the Wisconsin Economic Development Corporation (WEDC) in 2019 with the Wisconsin Minority Business Enterprise - Outstanding Large Business award. This prestigious recognition highlights our dedication to excellence in the industry and underscores our position as a leading construction firm in the region.

AWARDS & RECOGNITIONS**American Architecture Award****BizTimes Milwaukee**

Notable People

The Daily Reporter

Diversity in Business

Newsmakers of the Year

Top Projects

MARKETPLACE Governor's Award

Wisconsin Minority Business Enterprise Award

Mayor's Design Awards**Midwest Real Estate News Magazine**

Best of the Best: Top Construction Companies

Milwaukee Business Journal

CFO of the Year

Diversity in Business

Largest Construction Firms

Largest MBE Firms

Real Estate Awards

Tribal Business Journal

Top 100

USGBC Wisconsin Leadership Award**WCREW Impact Awards****GREENFIRE OFFICES****50**

Team Members

65

Awards

PRIORITY PLACE CBRF**2023 | Milwaukee, WI | 19,000 SF | CBRF**

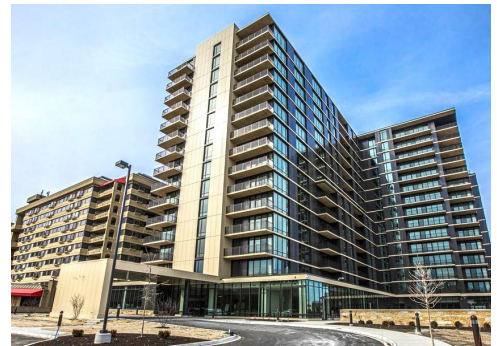
The renovation of an existing facility into a 24-bed community-based residential facility (CBRF) that houses a mixture of ambulatory and non-ambulatory residents. Scope of work included the modification of the existing floor plan to house three community bathrooms, two separate building additions that house a community sun room and bedrooms, along with revamped site work and facility entrance.

**GREAT LAKES INTER-TRIBAL COUNCIL JUVENILE TREATMENT FACILITY****In Progress | Cassian, WI | 31,000 SF | CBRF**

Proposed new construction of a 1-story 36-resident bed juvenile residential care facility, with treatment focused on community involvement and family participation in the recovery from substance abuse and behavioral health trauma. Features of the facility include a recovery center servicing adolescent youth, with resident rooms, amenity spaces, commercial kitchen & staff spaces.

**ST. CAMILLUS EAST TOWER****2023 | Milwaukee, WI | 511,000 SF | Senior Living**

Greenfire provided on-site supervision to manage and oversee the interior build-out for the new 15-story east tower addition. The expansion tower ties into the existing senior living community and includes 168 luxury units and features multiple culinary options, social and recreational areas, a chapel, art gallery, theater, and brand new wellness center with a pool. The construction project was located on an active site that tied into an existing tower requiring a high degree of on-site supervision to ensure a clean facility, mitigate risk and maintain a strict level of site safety for all residents and workers.

**37TH STREET SCHOOL SENIOR HOUSING****2021 | Milwaukee, WI | 50,000 SF | Senior Living**

The 37th Street School Senior Apartments is a rehabilitation and reconfiguration of a former Milwaukee Public School (MPS) into senior living apartments. It includes new construction of 49 apartments intended for mixed income seniors, the transformation of the third-floor gymnasium into a community room, and installation of new MEPF systems and modern amenities like air conditioning and elevators. The adaptive re-use restores historic features with bright and modern, sunlit apartments opening into wide corridors. The building was also updated to meet all ADA requirements.

**WAUKESHA CITY HALL****2021 | Waukesha, WI | 55,000 SF | Government / Public**

The City of Waukesha's new City Hall was a major public project completed by Greenfire. The new building was only 11 feet from the existing office and thus we had stakeholders overseeing the project every day. Features include offices and conference spaces, council chambers, a substantial masonry shell, and features a multi-story glass enclosure and a skywalk connecting to an existing parking garage across a high-traffic urban street. The project included demolition of the existing City Hall, along with site work and final landscaping.



REFERENCES

The following is a list of clients we invite you to contact that recently worked or are currently working with Greenfire.

Bevelyn Johnson

President & CEO

LCSW

414.460.6954

bevjohnson2003@yahoo.com

Katie Jelacic

City of Waukesha

262.524.3700

kjelacic@waukesha-wi.gov

Bryan Bainbridge

Chief Executive Officer

Great Lakes Inter-Tribal Council

715.588.1026

bbainbridge@glitc.org

CLIENT REFERENCES

The following is a list of clients we have completed similar projects for. Each of these experienced the thorough process of the Greenfire Approach and many are repeat clients.

- Bad River Band of Lake Superior Chippewa
- Barrett Lo Visionary Development
- Forest County Potawatomi Community
- Greywolf Partners
- Jewish Family Services
- Land Quest
- Little Traverse Bay Band of Lake Superior Chippewa
- Mandel Group
- Merge Development Group
- Michels Corporation
- Near West Side Partners
- Red Cliff Chippewa Housing Authority
- Royal Capital Group
- Sixteenth Street Health Center
- Tegethoff Development
- Wangard Partners



Attachment: Greenfire CMAA Services Proposal Ozaukee County CBRF (Construction Manager as Advisor Services for the Community-Based



PROJECT TEAM

Our greatest value added to any project is our people and their vast industry experience. From early project kick-off to project closeout, our team will be there along every step of the way, and will be dedicated to this project and will see it through to completion. Below is your project's proposed team and roles within the process.

SENIOR PROJECT MANAGER

The primary role of the Senior Project Manager is to provide support and oversee the project team. During Phase I and Phase II, there will be part-time oversight.

SENIOR PROJECT DEVELOPMENT MANAGER

The Senior Project Development Manager plays a critical role in driving the successful development and execution of construction projects. By leveraging expertise in project planning, budgeting, schedule management, and stakeholder communication, they contribute to the achievement of project goals and the delivery of high-quality, on-time, and within-budget construction projects through their involvement in the preconstruction process. During Phase I, there will be part-time preconstruction and estimating efforts.

PROJECT MANAGER

The Project Manager oversees and manages all aspects of the construction phase, ensuring timelines are maintained within budget, as well as maintaining effective communication channels with all stakeholders. Their ultimate goal is to deliver successful construction projects that meet client expectations. The Project Manager will be allocated to this project part-time.

SUPERINTENDENT

The Project Superintendent is responsible for overseeing and managing day-to-day operations on-site of the project. They will coordinate and supervise on-site activities, including scheduling, contractor management, quality control, and safety enforcement. Superintendents ensure that the project progresses according to plans, specifications, and timelines while maintaining high standards of quality and safety. They act as the primary point of contact between on-site personnel, project managers, and clients, facilitating effective communication and problem resolution. The Superintendent plays a crucial role in ensuring the successful execution of the project. The Superintendent will be allocated to this project full-time for the eight-month duration of the project.

MIKE SMITH, LEED® AP

SENIOR PROJECT MANAGER



LOCATION

Milwaukee, WI

EXPERIENCE

3 Years Experience with Greenfire
13 Years Total Experience

EDUCATION

University of Wisconsin, Stout
Bachelor of Science, Construction
Management

CERTIFICATIONS

OSHA 10
The Daily Reporter
Rising Young Professional of
Construction - 2019

AFFILIATIONS

Village of Sussex
Architectural Review Board Zoning
Board of Appeals
NAIOP Developing Leaders
Former Member
City of Brookfield Planning
Commission
Citizen Member - 2018 - 2021

REFERENCE

Megan Michuda
Wangard Partners
262.352.7153

Mike brings over a decade of experience managing a variety of construction teams and projects. He excels in creating effective communications between personnel, contractors, owners, and management teams. His results-oriented nature ensures projects are timely, on budget, and profitable for all parties involved. He is committed to finding cost effective solutions and problem-solving challenges that arise.

As Senior Project Manager, Mike oversees all facets of the project team, and ultimately responsible for the success of the project

PROJECT EXPERIENCE

Marquardt Village CBRF | Watertown, WI*

The construction of a new 44 unit Community Based Residential Care Facility (CBRF), a two story community center and administrative offices, extensive site improvements and a new main entrance. The design included many sustainable elements including geothermal wells to achieve energy efficiency.

Locklyn at Olympia Fields | Oconomowoc, WI

New construction of high-end apartment community that includes seven Class-A apartment buildings, a clubhouse, in-ground pool, site grading, infrastructure development and new retaining walls along an existing pond.

Tivoli Green | Mount Pleasant, WI

New multi-town home development which required master planning services for future development and building layout and sequencing.

Gateway Lofts | Kenosha, WI

Renovation of an existing medical office building adapted for housing for Gateway Technical College students and faculty. Project includes new construction of five town home style apartment buildings with detached garages and extensive site work including a retaining pond.

Westlawn Neighborhood Revitalization | Milwaukee, WI*

The construction of 156 new, affordable residential units in the Westlawn neighborhood, initially developed by the City of Milwaukee Housing Authority in 1951. The units include a mix of one bedroom multifamily units as well as family units of two, three, four and five bedrooms in a combination of townhouses, side-by-sides and bungalows, all designed with a focus on environmental sustainability and efficiency.

* completed with previous employer

ED PERSON**SENIOR PROJECT DEVELOPMENT MANAGER****LOCATION**

Milwaukee, WI

EXPERIENCE

10 Years Experience with Greenfire
25 Years Total Experience

EDUCATION

Milwaukee School of Engineering
Bachelor of Science,
Architectural Engineering

CERTIFICATIONS

OSHA 10

PARTICIPATION

Project Estimation
Preconstruction Oversight
Preconstruction Services

REFERENCE

Rob Gamperl
Sagewind Development
414-899-0007

Ed has 25 years of experience in the construction industry. He prides himself in his high-energy, no-excuses attitude, which clients and teammates alike appreciate and admire. His experience spans all markets, with extensive experience in multi-family residential, while his skills and expertise include every phase of the construction process - from planning and scheduling to project completion.

As Senior Project Development Manager, Ed will be leading the preconstruction effort. He has proven his ability time and again to manage his projects with diligent organization and effectiveness. His guidance has led to the completion of dozens of complex and diverse multi-million dollar projects through coordinating trades, developing partnerships and building positive rapport with architects, engineers, local officials and vendors.

PROJECT EXPERIENCE**Bain Station | Pleasant Prairie, WI***

68-acre development for senior housing, multi-family and single family buildings.

Golden Living - Colonial Manor | Glendale, WI*

Multiple-phased interior renovations of nursing home and rehabilitation facility.

West Allis Senior Living Community | West Allis, WI*

200 total units of independent, assisted living, memory care facility with underground parking.

Vim + Vigor | Milwaukee, WI

New construction of a mixed-use development that is an urban infill housing 247 units in two separate buildings with ground-floor retail space. Project required a high-degree of supervision and thorough communication to coordinate phased construction and leasing on an active site.

Beaumont Place | Milwaukee, WI

New construction of 83 high-end apartments located in three buildings in Whitefish Bay spanning from Santa Monica Boulevard to Diversey Boulevard. Project consists of podium construction with ground-level parking and three multifamily buildings on top.

Echelon Apartments | Wauwatosa, WI

Renovation and new construction of a large-scale apartment community at Innovation Campus. The 317,000 SF development renovated the historical Eschweiler building and transformed into administrative services and resident amenities. Six additional buildings were constructed housing 188 coordination and communication with Owner and City to preserve the surrounding environmental habitat.

* completed with previous employer

ROB NORRIS

PROJECT MANAGER



LOCATION

Milwaukee, WI

EXPERIENCE

5 Years Experience with Greenfire
8 Years Total Experience

EDUCATION

University of Wisconsin,
La Crosse
Bachelor of Science, Chemistry

REFERENCE

Joyce Koker
Harley-Davidson Foundation
414.217.6388

Rob takes an active role with construction management and administration tasks for various developments. He is an exceptional communicator, is deadline-oriented, customer focused, and is well versed in project management information systems and cloud-based technology. His strong analytical skills serve him well when recommending project solutions and problem solving in order to prevent delays.

As Project Manager, Rob will be the lead during the construction phase, which includes:

- Management of all submittals and RFI's
- Keeper of all owner and project meeting minutes
- Management of PROCORE, online project management system
- Resource for superintendent to manage all finances, schedule and contractors

PROJECT EXPERIENCE

St. Camillus East Tower | Wauwatosa, WI

New construction of a 15-story Senior Living tower on top of a four story podium situated in a compact, high-profile urban environment. All site logistics and operations contained within the construction footprint.

Locklyn at Olympia Fields | Oconomowoc, WI

New construction of high-end apartment community that includes seven Class-A apartment buildings, a clubhouse, in-ground pool, site grading, infrastructure development and new retaining walls along an existing pond.

Crescent Apartments | Wauwatosa, WI

New construction of a 102-unit luxury apartment community. The project involves the construction of a four-story building and a 118-stall underground parking structure along with the historic renovation of the M10 Powerhouse.

Highland Park Apartment Renovation | Milwaukee, WI

5,400 SF multi-family renovation. Project included selective demolition, masonry work, kitchen and bathroom relocation, handicap ramp backfill and miscellaneous earthwork.

Confidential Foundation Recreation Area | Milwaukee, WI

Site development project for Fortune 500 company. The project is the transformation of a corporate office parking lot into an urban community gathering space utilizing locally sourced materials such as brick, natural timber and weathered steel. The site includes a park, drivable paths, a central stage area for performances and a multitude of plantings.

CONNOR WIERSCHEM

SUPERINTENDENT



LOCATION

Milwaukee, WI

EXPERIENCE

4 Years Experience with Greenfire
8 Years Total Experience

EDUCATION

Minnesota State University of
Mankato
Bachelor of Science, Construction
Management

CERTIFICATIONS

OSHA30
Sewage Water Prevention Planning

REFERENCE

Rob Gamperl
Sagewind Development
414-899-0007

As a superintendent, Connor has experience in multi-family residential and senior living development construction. He is detail oriented and efficient, with strengths in both project and time management. His previous work honed his scheduling and leadership skills, developed his proficiency in reading and interpreting construction documents and strengthened his technical skills in quality assurance and task management. In his role at Greenfire, Connor is responsible for planning, scheduling and managing field operations. He supervises contractor labor, manages site logistics, coordinates delivery of materials and use of equipment. He also works closely with customers, architects, and vendors.

As superintendent, Connor is responsible for:

- Supervision of all on-site labor
- Coordination of all site logistics and material deliveries
- Managing all on-site work to meet or exceed the construction schedule
- All safety, cleanliness and quality of work on the site

PROJECT EXPERIENCE

Legends of Woodbury | Woodbury, MN*

A new senior living apartment complex comprising two buildings connected by a two-story central clubhouse. The project's 216 affordable units consist of 66 one-bedroom, 90 two-bedroom, and 60 three-bedroom apartments.

Tivoli Green | Mount Pleasant, WI

New multi-town home development which required master planning services for future development and building layout and sequencing. Project includes mass site grading along with construction of two phases townhomes totaling 15 buildings.

Greenway Infrastructure | Kenosha, WI

Greenway is a comprehensive redevelopment project of the approximately 240-acre land site owned by Forest County Potawatomi, formerly occupied by the Dairyland Greyhound Park. The goal of the project is to turn the parcel into a thriving mixed-use residential and commercial center.

Potawatomi Casino | Hotel Project First Strike | Milwaukee, WI

The third-floor renovation of the Potawatomi Hotel & Casino impacts more than 120,000 SF of space and provides guests with new gaming, food, and entertainment experiences.

* completed with previous employer

Request for Proposals
(RFP)
For
Construction Management as Advisor Services
For
Construction of a
Community Based
Residential Facility
(CBRF)
at
Ozaukee County's
Lasata Senior Living
Campus



Proposals will be received by the Ozaukee County Administrator's Office at 121 W Main Street, Port Washington, WI 53074 until 4:00 PM, CDT, on Thursday, March 14, 2024, and shall be addressed and marked as follows:

Ozaukee County
County Administrator's Office
Attn: Lasata CBRF Construction Management
PO Box 994
121 W Main Street
Port Washington, WI

Issued: February 22, 2024
By: Ozaukee County

**Request for Proposals Notice for Construction Management as Advisor Services
for the Construction of a Community Based Residential Facility (CBRF) at the
County-Owned Lasata Senior Living Campus in Cedarburg, WI**

**Official Public Notice
2/22/24 & 2/29/24**

Proposals will be received by Ozaukee County at its office at 121 W Main Street until 4:00 PM, CDT, on Thursday, March 14, 2024, for Construction Management as Advisor Services for the construction of a CBRF at our Lasata Senior Living Campus, located at W76 N677, N Wauwatosa Rd, Cedarburg, WI 53012.

Proposed construction of the new CBRF is to be approximately, 18,000 sf, consisting of 24 private resident bedrooms, support service spaces, and resident amenity spaces. Design should incorporate ADA standards for all rooms. Estimated budget for construction management, architecture & engineering, and construction is approximately \$4.5 million. An architecture & engineering firm will be selected following the selection of construction management services.

The successful consultant will be required to comply with all applicable federal regulations related to the ARPA act. Please refer to Lasata CBRF Construction Management on all correspondence relating to this project.

This Request for Proposals is available on our website at www.ozaukeecounty.gov or at the County Clerk's Office at 121 W Main St, Port Washington, WI 53074. Copies of the Request for Proposals may also be obtained from Ozaukee County, by calling (262) 284-8324 between 8:30 and 4:30 or by email: jwittek@ozaukeecounty.gov

Request for Proposals
(RFP)
For
Construction Management as Advisor Services for Construction of a Community
Based Residential Facility (CBRF) at Ozaukee County's Lasata Senior Living
Campus
For
Ozaukee
County

February 22, 2024

Table of Contents

1.0 Introduction	4
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4.0 Proposal Content	7
5.0 Selection Criteria	13
6.0 Timeline	15

Attachments

- Lasata CBRF Concept Design – AG Architecture
- Lasata CBRF Strategic Planning (Financial/Market Assessment, Project Cost Estimate) - CLA

1.0 Introduction

Ozaukee County, Wisconsin has been awarded federal funding from the American Rescue Plan Act (ARPA). Ozaukee County invites interested and qualified firms to submit written Proposals for Construction Management as Advisor Services (CMaA). Ozaukee County intends to use the results of this RFP to evaluate and select a firm in order to award a fixed price contract for the below listed CMaA Services.

Ozaukee County is issuing this RFP for CMaA services relating to the construction of an approximately 18,000 sf 24-unit CBRF. CMaA firm will be part of a collaborative team made up of County staff, an architectural and engineering consultant to be determined by RFP, and construction firm.

Ozaukee County seeks CMaA services from qualified firms who have knowledge or experience in understanding the needs of building a CBRF and or public construction. Ozaukee County would like to begin construction by the fall of 2024, and maintain the ability to complete the project by end of 2025. Proposal must comply with the requirements of the American Rescue Plan Act (ARPA).

Ozaukee County has been researching the feasibility of constructing a CBRF since 2019, engaging in pre-design services to include; function program and space allocation analysis, and conceptual building footprint and site plan, project timeline, and cost estimation. Financial modeling services have also been engaged in 2021 and 2023, to assess the market and current condition as they relate to the long-term operational and financial success.

These construction management services will be conducted under a contract with Ozaukee County.

The contract will be regulated according to the provisions of all Federal, State and local laws and ordinances that are applicable. The Ozaukee County Board has authorized the County Administrator's Office by resolution to engage in selection of construction management, architectural and engineering, and construction services, and has budgeted \$4.5 million to complete.

2.0 Project Description

(1) Construction of a Community Based Residential Facility

With the support of ARPA funds, Ozaukee County will expand its current Lasata Senior Living Campus, to construct an approximately 18,000 sf, 24 resident bedroom facility. The property is located in Cedarburg, WI, and owned by Ozaukee County.

Ozaukee County has proposed building a CBRF located on our Lasata Senior Living Campus, adjacent and connected to the Lasata Care Center, located at W76 N677, N Wauwatosa Rd, Cedarburg, WI 53012. Ozaukee County has budgeted \$4.5 million to complete construction of this project. Proposed construction of the new CBRF is to be approximately, 18,000 sf, consisting of 24 private resident bedrooms, support service spaces, and resident amenity spaces. Design should incorporate ADA standards for all rooms. Federal funding is provided by American Rescue Plan Act (ARPA) funding provided to Ozaukee County.

The construction of a CBRF will close the loop in providing a continuum of care to our seniors, and current residents, who desire to transition to assisted living and memory care assisted living, all within the Lasata Senior Living Campus.

3.0 Scope of Services

Ozaukee County intends to retain a third-party Construction Manager as Advisor and act as an owner's representative. The Construction Manager will assist in providing cost estimates, attend all Work Team meetings, participate in the design process and assist with value engineering as outlined below. During Project construction, the Construction Manager will take the lead on all construction progress meetings including meeting minutes, advise the County on all change order requests during construction and act as an owner's representative, and provide full time staffing during construction to update the County as the work progresses. The Construction Manager will not be allowed to bid on the project and self-perform work.

The scope of the Construction Manager's basic services will follow as summarized below:

Phase I – Pre-Construction Services

- a. Work with and assist in selection of architect and engineering services to be retained by the County as the designer to prepare plans for construction.
- b. Attend all Work Team Meetings.
- c. Construction Manager shall review the schedule and construction budget furnished by the County to ascertain the requirements of the project and shall arrive at mutual understanding of these requirements with the County.
- d. The selected Construction Manager, and their consultants shall meet with County staff (County Administrator's Office, Lasata Senior Living Campus Director, etc.), architect and engineering firm as required to confirm the prepared program information (preliminary plans and cost estimates), and to develop the desired program and features for the facility, and methods of project delivery, to include potential performance evaluations of alternative materials and systems.
- e. Assist the architect and County in developing project budget for construction costs, miscellaneous expenses (utilities, survey, testing, etc.), furnishings and contingency.
- f. Prepare preliminary cost estimates for program requirements based on early schematic designs. Update and revise construction estimates as the architect progresses through 30, 60, 90 design development, and construction documents.
- g. Construction Manager will advise the County and architect if it appears the construction cost may exceed its portion of the approved project budget and make recommendations for corrective actions.
- h. Make recommendations whenever design details adversely affect constructability, cost, or construction schedule.
- i. Construction Manager shall periodically update the project schedule for the design team's review and the County's acceptance.
- j. Neither the Construction Manager nor their firm nor other business in which they may hold an interest may submit bids on any contracts for the Project. If the bid prices exceed budget amounts, the Construction Manager and the

project design team and owner may select alternate bid items or redesign the buildings and improvements to bring the bid prices for the Project to within budget. The County will not provide additional compensation to the Construction Manager or project design team for this effort.

- k. The architect shall be responsible for obtaining approvals of building plans and site improvements from appropriate municipal bodies.

Phase II – Construction Phase – Administration of the Construction Contract

- l. The Construction Manager shall prepare all necessary bid documents for solicitation of construction contracts in consultation with the County and architect.
- m. Construction Manager shall provide full-time superintendent on-site during construction.
- n. The Construction Manager shall act as an Owner's Representative during construction in cooperation with the architect and County, and provide cost and schedule updates and forecasts to the County and architect.
- o. The Construction Manager shall develop and implement procedures for review and processing of applications for payment from the Contractors. The Construction Manager will review those payment applications with the County.
- p. The Construction Manager will take the lead on all construction progress meetings including meeting minutes, advise the County on all change order requests during construction, and regular meetings with the County's Health and Human Services Committee and act as an owner's representative.

Information to be made available by the County includes:

- Lasata CBRF Concept Design – AG Architecture
- Lasata CBRF Strategic Planning (Financial/Market Assessment, Project Cost Estimate) - CLA

4.0 Proposal Contents and Selection

- 1. Proposal Cover Letter
 - a. Statement of interest
 - b. Certification that the information and data submitted is true and complete to the best knowledge of the individual signing the letter.
 - c. The name, address, telephone number and e-mail of the individual to contact regarding the submittal.
 - d. The letter shall be signed by an authorized principal or partner of the firm.
 - e. If you propose a team of two or more firms explain on an additional page the proposed work of each firm.

2. Project scope statement describing the work to be undertaken, include the services outlined in the solicitation, any modifications or expansion of the scope provided to deliver appropriate construction managements service.
 - a. Briefly describe how your firm performs the following services:
 - Cost estimating
 - Cost control
 - Quality control
 - Drawing and specification review
 - Scheduling in preconstruction and construction phases
3. Project work plan indicating mechanisms proposed to coordinate the work effort with Ozaukee County.
 - a. Please provide an example of how your firm develops and issues periodic progress reports that describe key events, changes and performance relative to schedule and budget.
 - b. Please provide examples of how your firm tracks, monitors and replies to requests for:
 - project information
 - value engineering decisions
 - design change decisions.
 - c. Please differentiate when communication is documented (email) or delivered verbally (telephone or face to face meeting.)
 - d. Please explain how your firm provides periodic updates to construction schedules identifying critical path analysis, milestones, project requirements, approvals, and start and finish dates for all major activities.
4. Proposer's profile and a clear concise statement with:
 - a. Examples indicating past performance and familiarity with the type of work detailed in the solicitation.
 - b. Provide 3 written references from previous clients with similar projects and all references give excellent response on quality of service. (Attach references and contact information)
 - c. A list of client references for which Proposer provided similar services as described in the RFP.
5. Project team statement indicating the professional and technical qualifications of the key persons who will be assigned to the project and their responsibilities within the Scope of Services including the team leader.
 - a. The individual's experience with similar or related projects of this size and scope, including references.
 - b. Specific work assignments of each individual that included CBRF construction or other public sector projects and references that could comment on the quality of the work performed.

- c. For each individual note years of experience and number of years that the individual has been with the firm under its current name and ownership.
 - d. Indicate primary work location for these individuals.
 - e. Identify any proposed sub-contractor(s) and include a description of the arrangement and their role in the project.
 - f. Provide written assurance that the key individuals listed and identified will be performing the work and not be substituted with other personnel or reassigned to another project without the County's approval.
 - g. Identify the function/responsibility of each individual assigned to work on this project (e.g., project manager, technician, etc.) along with their role/responsibilities on this project. Experience summaries of these key individuals shall be provided and the amount of time to be allocated to this project. If applicable, include a description of sub-consultants, indicating what portion of the work is to be done by them. Include in your proposal a chart of personnel similar to the following:
6. Detailed fee proposal for Construction Management as Advisor Services.
- a. In a separate sealed envelope marked "Construction Management Service Fees", provide a table identifying your staffing requirements, estimated hours, associated costs and reimbursables for a total not to exceed fee for the construction management services described in this RFP. The envelope should be identified with the name of this project and the name of your company
 - b. The table should include the following columns: phase, task, staff member (hourly rates), total staff costs, and reimbursable expenses. Include estimated hours for staff members based on each phase and task.
 - c. Identify total time & material not to exceed cost for each phase. Provide a separate "Professional Service Fees" table for recommended additional scope items not included in Section 3.0 Scope of Services.
 - d. The total proposal cost, indicated as a not to exceed fixed fee, shall delineate the cost for each of the two (2) phases of service as detailed under Section 3.0 Scope of Services. Fees for each phase to include costs for all personnel whether on the job site, in the home office, or as a consultant hired by the Construction Manager.
 - e. The cost proposal shall include description and listing of any anticipated reimbursable expenses.
 - f. All costs associated with site surveying, inspection, utilities shall be paid by Ozaukee County
 - g. The total of all charges for Phases I, and II, including reimbursable costs, will be used in evaluating the cost portion of this proposal.
 - h. Any additional work beyond the scope of services must be authorized in writing by the Ozaukee County before additional costs may be incurred. These fees will be determined prior to commencement of work and will be based on the hourly rates as shown in the following table.

Personnel	Hourly Rate	Estimated Hours for this Project	Project Function	Experience Related to this Project

Proposal placed in the same order as described in above. The Proposal Cover Sheet must be signed by the submitter or authorized representative and dated. Proposals are not to exceed 20 pages. The pages of the Proposal must be numbered in consecutive order and should not exceed the maximum sheet size of 8.5" x 11."

- Ozaukee County will consider proposals from contractors with experience completing CBRF or public construction projects.
- Responsible proposal will demonstrate the ability to provide the Construction Management scope of services, and collaborate as part of a team.

If awarded, a firm fixed-price contract award shall be made in writing. Ozaukee County can, however, decide not to make the award to any of the proposers. Ozaukee County may reissue the project under certain conditions (i.e., proposals are not responsible, or the proposals do not contain information necessary to evaluate the proposals).

If you have any questions regarding this Request for Proposals, please contact: Jason Wittek, jwittek@ozaukeecounty.gov or 262-284-8324.

Other Conditions of Proposal Submittal

1. Only one Proposal will be accepted from any person, firm, or entity.
2. No proposal will be accepted from any person, firm or entity that is in arrears for any obligation to Ozaukee County, is debarred from contracting for federally funded projects, or that otherwise may be deemed irresponsible or unresponsive by Ozaukee County or the elected officials of Ozaukee County, Wisconsin.
3. All proposals submitted become public information and may be reviewed by anyone requesting to do so at the conclusion of the evaluation process.
4. Requirements and conditions of employment and contracting to be observed for compliance with any federal ARPA regulation, and state, and local laws.
5. No Davis-Bacon Prevailing Wage requirements or Buy America requirements are required by the ARPA federal funding.

Directions for Proposal Submission

Complete proposals must be delivered to Ozaukee County Administrator's Office in a sealed envelope on or before 4:00 pm Thursday, March 14, 2024. Proposals that arrive in the office after 4:00 pm Thursday, March 14, 2024 will be rejected.

Proposers must submit the following:

- One (1) original plus five (5) hard copies of the RFP
- One (1) copy of "Professional Service Fees" in a separate sealed envelope.
- One (1) electronic copy (via usb drive) of all materials required for acceptance of their proposals on or before 4:00 p.m. CST time on March 14, 2024.

Direct submissions to:

Ozaukee County
County Administrator's Office
Attn: Lasata CBRF Construction Management
PO Box 994
121 W Main Street
Port Washington, WI

Ozaukee County reserves the right to reject any and all Proposals not meeting the requirements of this Request for Proposals for Construction Management as Advisor services.

Persons requesting ADA assistance accommodations for hearing and speech impaired may contact Jason Wittek, Policy & Budget Analyst at 262-284-8324 or

jwittek@ozaukeecounty.gov

Individuals/firms interested in being considered for this project must submit a Proposal detailing qualifications, technical expertise, management, and staff capabilities, related prior experience, and a detailed cost estimate for the Scope of Services described above. The objective of the sealed Proposal process is to objectively select the most responsive and responsible Proposal.

Contact Information

For Request for Proposal packages, all interested persons and firms should go to ozaukeecounty.gov or contact Jason Wittek, Policy & Budget Analyst between the hours of 8:30 am to 4:30 pm, Monday-Friday, at 262-284-8324 or jwittek@ozaukeecounty.gov, to ask questions or request additional information, as needed.

Companies that intend to submit a Proposal should send notification of intent to Ozaukee County with the person's/firm's name and contact information in case of addenda or other changes. Additionally, the Request for Proposals may be sent to those companies that are included on the Ozaukee County contact list specifically created for this solicitation.

Those who Ozaukee County has sent a Request for Proposal and those who have provided contact information through a request for a copy of the Request for Proposals or through a notification of intent will receive all information regarding the Request for Proposals. The information may include, but is not limited to, any Addendums to the Request for Proposals, answers to inquiries received regarding the Solicitation, or changes to the schedule.

Interested proposers have the responsibility of understanding what is required by this Request for Proposals. During the review of the solicitation, if the proposer discovers any errors, omissions, or ambiguities within the solicitation, they should identify them in writing and call them to the immediate attention of Ozaukee County prior to the Request for Proposals submission deadline. Ozaukee County shall not be held responsible for any person's/firm's lack of understanding of the project.

Questions for clarification concerning this Solicitation must be in writing via email to Jason Wittek, Policy & Budget Analyst on or before 4:00 pm, March 6, 2024. After this date, questions involving the content or intent of the proposal will not be answered. All questions will be responded to by Jason Wittek, Policy & Budget Analyst, County Administrator's Office, in writing via email, and provided to all parties requesting a Request for Proposals packet for which Ozaukee County has the contact information and treated as an addendum to the Request for Proposals packet.

No pre-submittal conference will be held for this RFP. Ozaukee County makes no representations as to the conditions of the project other than those representations made herein, and no employee or any other representative of Ozaukee County has the authority to make any oral or written representations as to the conditions of the project. Companies should only contact the person designated above regarding this Solicitation and should not contact Ozaukee County's other staff or County Board members, or any other government staff for clarification on this Request for Proposals.

Addenda Interpretations

If it becomes necessary to revise any part of this Request for Proposals, a written addendum will be provided. Ozaukee County is not bound by any oral clarifications changing the scope of the work for this project. All addenda issued by Ozaukee County will become part of the official Request for Proposals and will be emailed to all Proposers of record based upon contact information on record at the original time of issuance or subsequently provided.

5.0 Selection Criteria

A committee selected by Ozaukee County will evaluate the submitted Proposals and award to the most responsive and responsible proposal when all evaluation criteria are considered.

Right to Reject Proposals

The evaluation committee reserves the right to reject any and all proposals.

Responses will be reviewed based on the following criteria:

- | | |
|---|--------------------------|
| 1. Project Coordinator/Lead's Experience | <u>Maximum 20 Points</u> |
| A. Qualifications, experience, and ability of project coordinator exceed what is required | 20 points |
| B. Qualifications, experience, and ability meet what is required | 15 points |
| C. Qualifications, experience, and ability less than required | 10 Points |
| D. Less than 1 year experience in project coordination | 5 Points |
| E. No experience/inadequate | 0 Points |
| 2. Firm's Project Completion Background & Capabilities | <u>Maximum 20 Points</u> |
| A. Direct experience with CBRF projects within proposed time frame & budget | 20 points |
| B. Comparable or similar projects or public construction | 15 Points |
| C. Demonstrates competence but no direct CBRF or public construction experience | 10 Points |
| D. Working on a similar project; not yet completed | 5 Points |
| E. No work on a similar project | 0 Points |
| 3. References from Similar Projects | <u>Maximum 20 Points</u> |
| A. Respondent lists 3 previous clients with similar projects and all references give excellent response on quality of service | 20 Points |
| B. Respondent lists 2 previous clients | 15 Points |
| C. Respondent lists 1 previous client | 10 Points |
| D. Respondent lists no previous references | 0 Points |
| 4. Project Understanding, Responsiveness to Scope | <u>Maximum 25 Points</u> |
| A. Needs of project are fully addressed in Proposal | 25 Points |
| B. Needs of project are somewhat addressed in Proposal | 15 Points |
| C. Needs of project are not addressed/resolved in Proposal | 0 Points |
| 5. Budget | <u>Maximum 15 Points</u> |
| A. Budget within Ozaukee County's capacity as proposed | 15 Points |
| B. Budget slightly above Ozaukee County's capacity as proposed; potentially feasible with modest adjustment | 10 Points |
| C. Budget not reasonably within Ozaukee County's capacity as proposed; would require extensive adjustment to be feasible | 0 Points |

Selection Criteria Details:

1. Project Coordinator/Lead's Experience:
 - i. Qualifications, experience, and abilities of project manager assigned to this project with consideration given to project experience within CBRF and public construction.
 - ii. Demonstrated ability to communicate effectively with municipalities, other key stake holder groups formed around the Project and the public.
2. Firms Project Completion Background and Capabilities:
 - i. The extent to which the Proposer offers qualified personnel, including any subcontractors, with necessary training, communication skills, experience, technical and resource capacity, equipment, and facilities necessary to perform the work, including qualifications, experience and abilities
 - ii. Documentation of staffing levels necessary to meet the timetable most desirable to the County.
3. References from Similar Projects:
 - i. Direct experience with CBRF construction or similar public construction projects in the 15,000 to 25,000 square foot range of new building experience.
 - ii. Success in completing comparable CBRF or public sector projects on schedule and within budget.
 - iii. The extent to which the Proposer has demonstrated competence in performing similar work.
 - iv. The extent the Proposer has demonstrated that work has been completed on schedule and to the satisfaction of former clients.
4. Project Understanding and Approach:
 - i. The extent to which the Proposer's proposal addresses key technical criteria and tasks identified in the Scope of Services; and demonstrates a thorough understanding of the Project scope.
 - ii. The proposed project timeline and extent to which the Proposer outlines a detailed and reasonable schedule of key milestones and action steps to be completed.
5. Fees – Detailed fee proposal (as described in Section 4.6) within County's Budget

6.0 Timeline & Selection Process Schedule

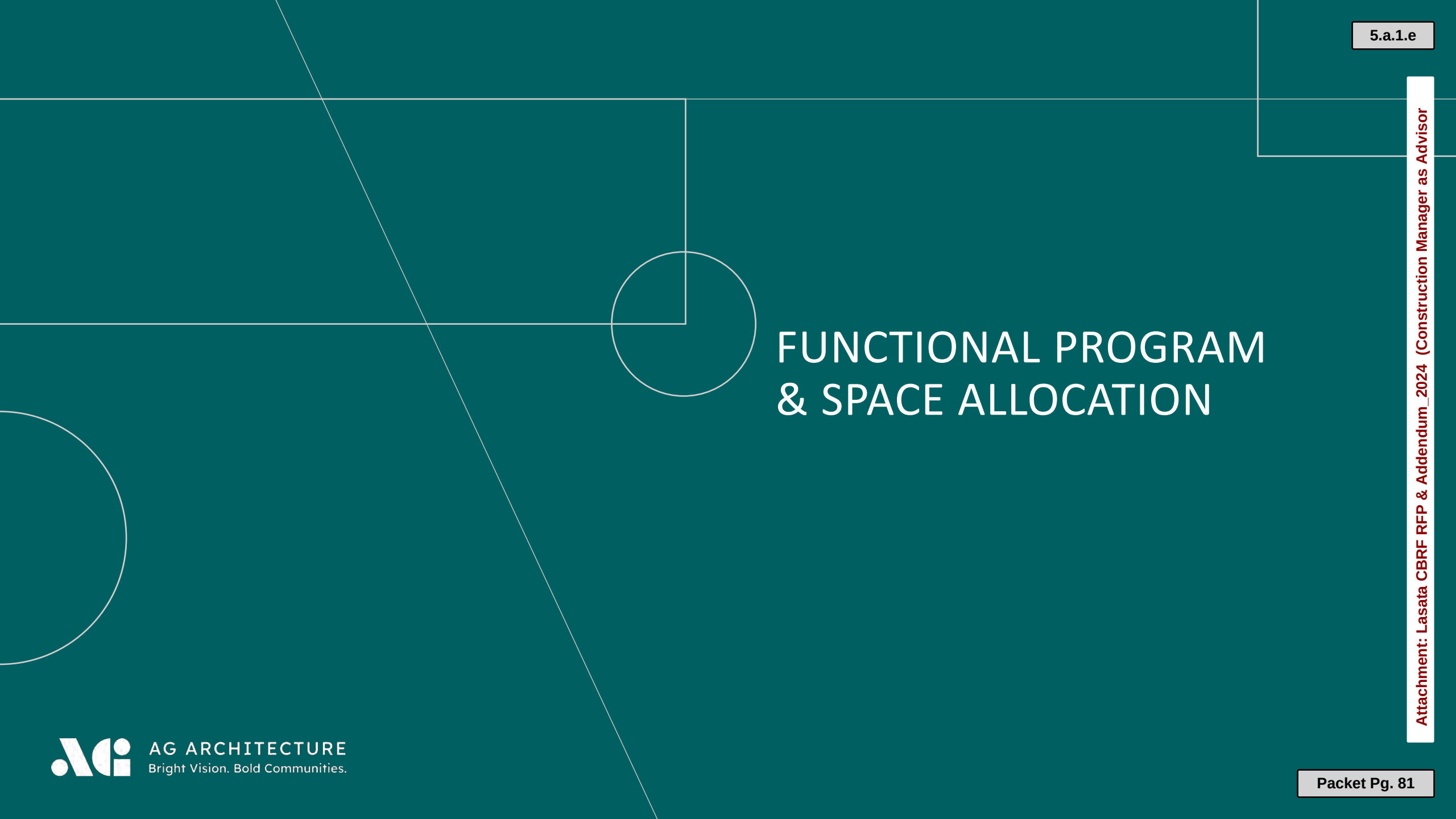
Ozaukee County anticipates authorizing a contract for this work and issuing a notice to proceed no later than April 3, 2024. The scope of services will take place over a twelve-fifteen month period. Ozaukee County's goal is to have the CBRF completed, no later than the summer of 2025, if possible. Responding persons/firms should comment on the above schedule as part of their proposal and state how realistic it is to achieve substantial completion of the work by August 30, 2025.

RFP Issuance Date	February 22, 2024
Last Day for Submitting Written Questions	March 6, 2024
E-mail and post addenda to firms, which Include answers to questions, supplements, and/or revisions to RFP	March 9, 2024
Proposals due by 4:00 pm	March 14, 2024
Evaluate Proposals/Interview firms if needed	March 18-22, 2024
Notice of Intent to Award (HHS Committee)	March 26, 2024
Notice to Proceed/Award (County Board)	April 3, 2024
CMaA Firm under Contract by	April 13, 2024



Lasata Care Center Concept Design Proposed CBRF

PRESENTED BY: Andrew Lee Alden, Senior Associate
September 2023



FUNCTIONAL PROGRAM & SPACE ALLOCATION

DEPARTMENT NAME	Name of the department – this form may be duplicated as needed to cover all areas – for campus communities, consider the impact of location on a campus setting.		
SCOPE OF SERVICE	What services does this department provide, when, and who receives the services?		
KEY INTER & INTRA DEPARTMENTAL RELATIONSHIPS	When considering your department, what are the important connections within your department and with other departments that are necessary for its daily function?		
CRITICAL DESIGN CONSIDERATIONS	When considering your department – what are the critical “physical environment” elements we should know about? This category covers the “bricks & mortar of the space”.		
SERVICE VOLUMES & PERFORMANCE INDICATORS	What is the capacity of the services you provide? A typical day/week comparison.		
STAFFING (FTE’S)	Position title	Position title	add cells as needed
	[#] FTE’s	[#] FTE’s	add cells as needed
OPERATIONAL OR SPACE PLANNING ISSUES	When considering your space – what are the important operational processes we should know about and how do they <u>impact</u> the physical layout of the space. Please consider both internal processes and if appropriate, external relationships (on campus and beyond).		
INFORMATION TECHNOLOGY	Does this department have any “IT” needs as related to telephone, computer, internet, television, nurse call, wander guard, medical records, asset management systems, etc.?		
COMMENTS/OTHER CONSIDERATIONS	This space is reserved for additional information not covered in the categories above. We prefer to err on the side of too much information, as opposed to not enough. Feel free to <u>continue</u> on the back side of the form		

Lasata Senior Living Campus
Cedarburg, WI

DRAFT

February 2020
Revised: 02/11/2020

SPACE PROGRAM (24 Residents - 2 Households of 12 Each)
Community Based Residential Facility (CBRF) Class CNA

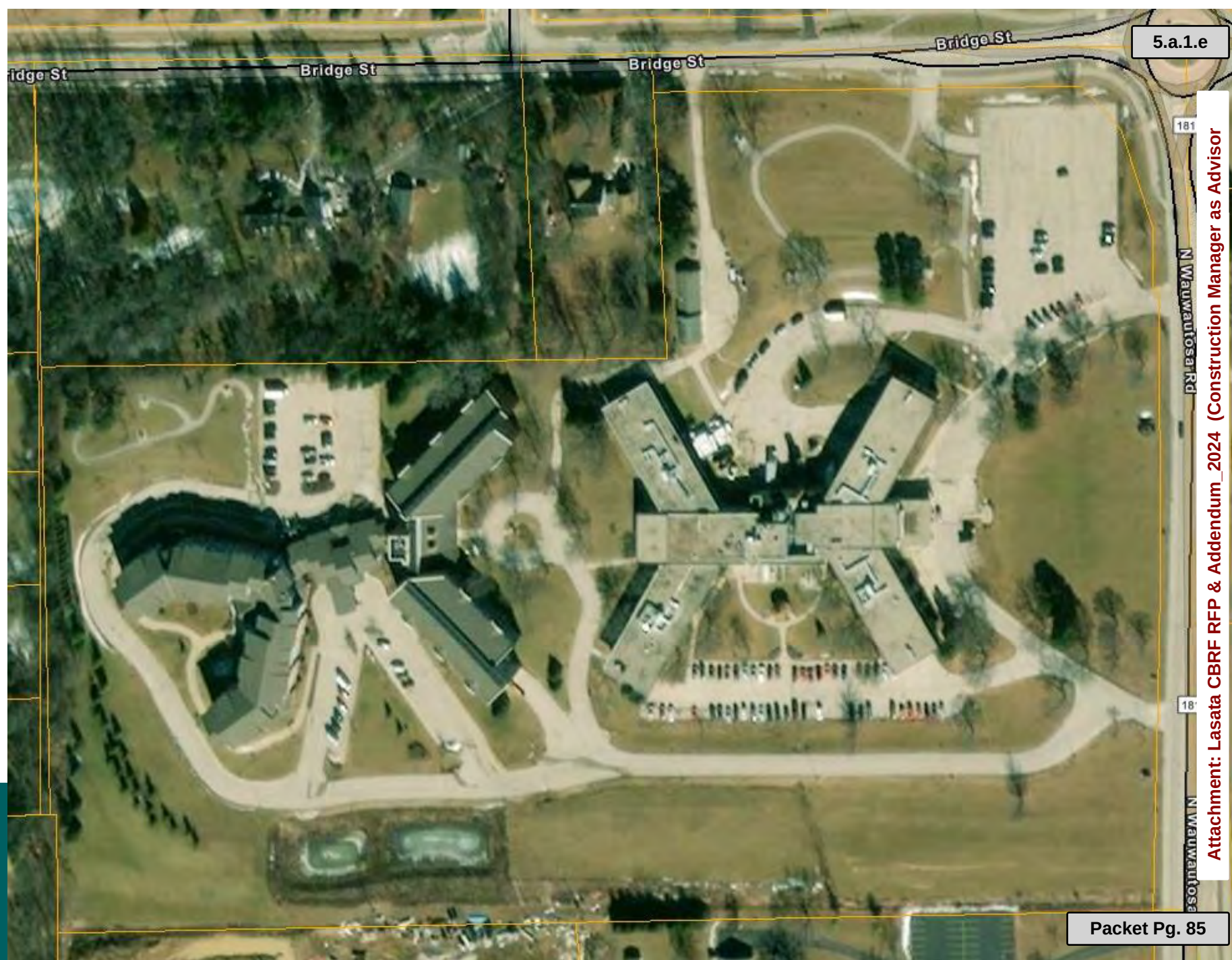
1.0 SUPPORT SPACES					
	Support Spaces	Quantity	Units S.F.	Area S.F.	Notes
0.1	Vestibule	1	166	166	walk off matt, seating, storage closet
0.2	Lobby / Small Reception Desk	0	0	0	possible volunteer greeter, sign in (COMBINED WITH LOBBY LOUNGE)
0.3	Copy / File / Work Room	1	90	90	cabinetry, counter, copy machine
0.4	Conference / Family Room	1	188	188	
0.5	Office - Director of CBRF	1	133	133	
0.6	Office - Director of Nursing	1	120	120	
0.7	Electrical Main Room	1	145	145	Independent service from SNF (E-Gen)
0.8	Electrical Closet	1	45	45	
0.9	IT Main Room	1	65	65	Independent service from SNF
0.10	IT Closet	1	56	56	
0.11	Boilers / Water Heater / Water Treatment	1	144	144	Independent service from SNF
0.12	General Storage	1	167	167	
0.13	Employee Break Room	1	179	179	Refrigerator, sink, microwave, cabinetry, 12 1/2 lockers, toilet
0.14	Public Toilet	1	56	56	
Subtotal				1,554	

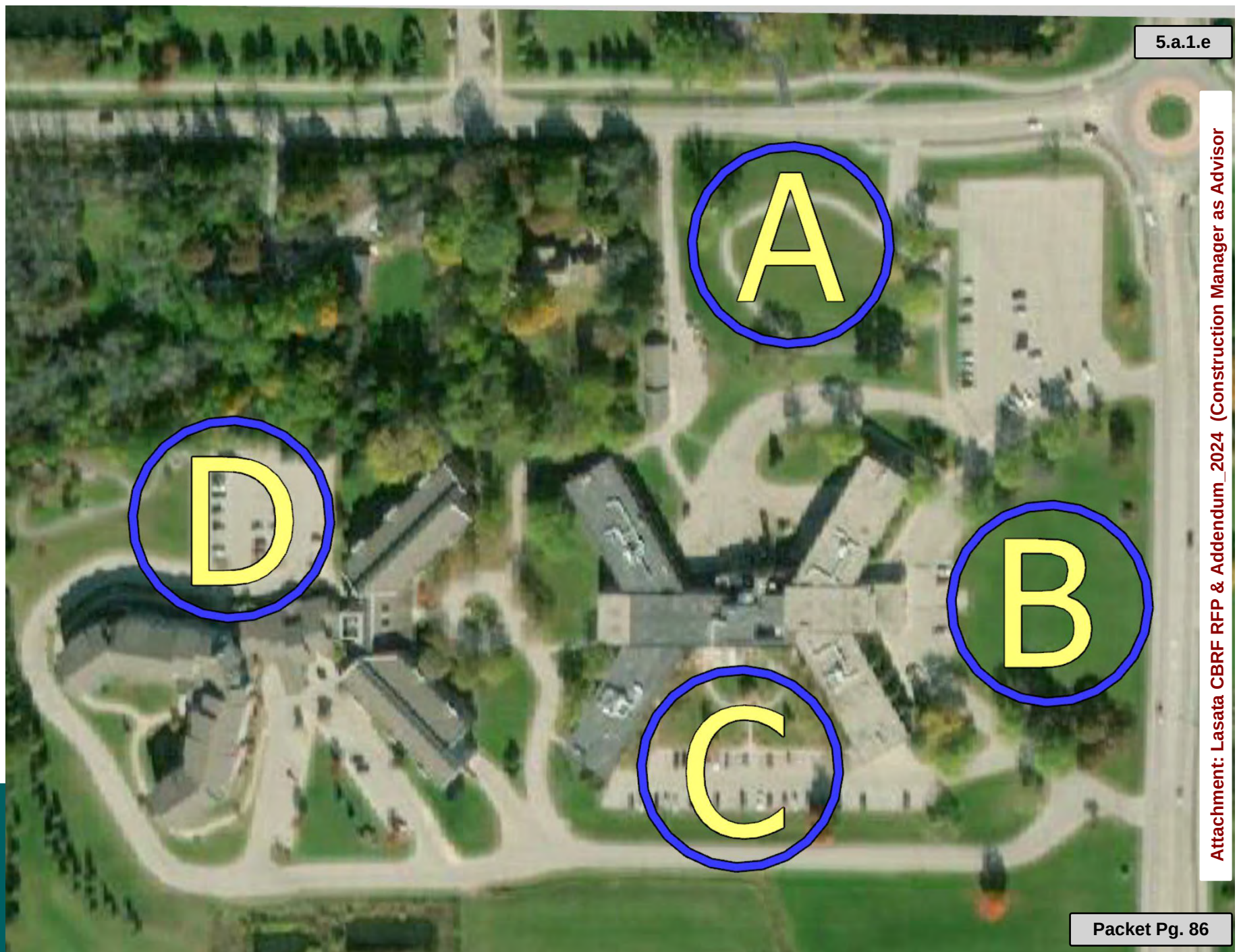
2.0 RESIDENT BEDROOMS					
	Resident Bedrooms	Quantity	Units S.F.	Area S.F.	Notes
0.1	Private Bedroom	24	300	7,200	3 Piece Bathrooms (toilet, sink, cabinetry, roll in shower), barnstyle bathroom door, nurse server, built in clothes closet, 3'-8" entry door, memory box at entry
Subtotal		24		7,200	





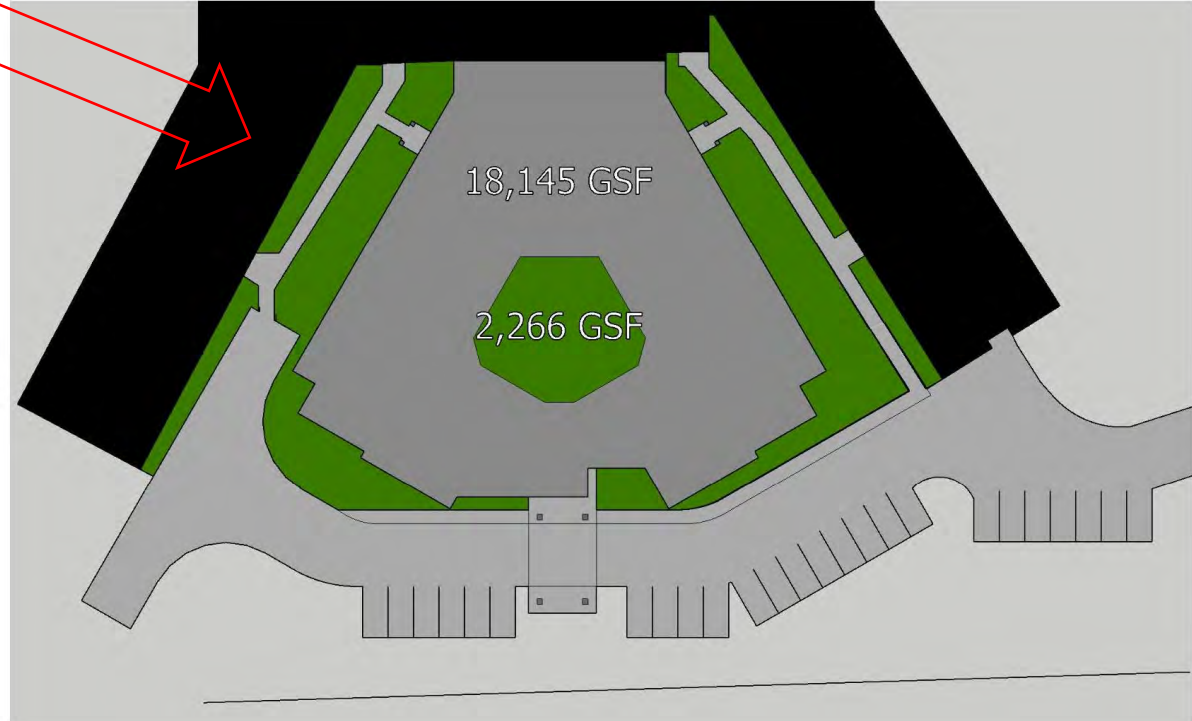
SITE ANALYSIS







CONCEPT DESIGN

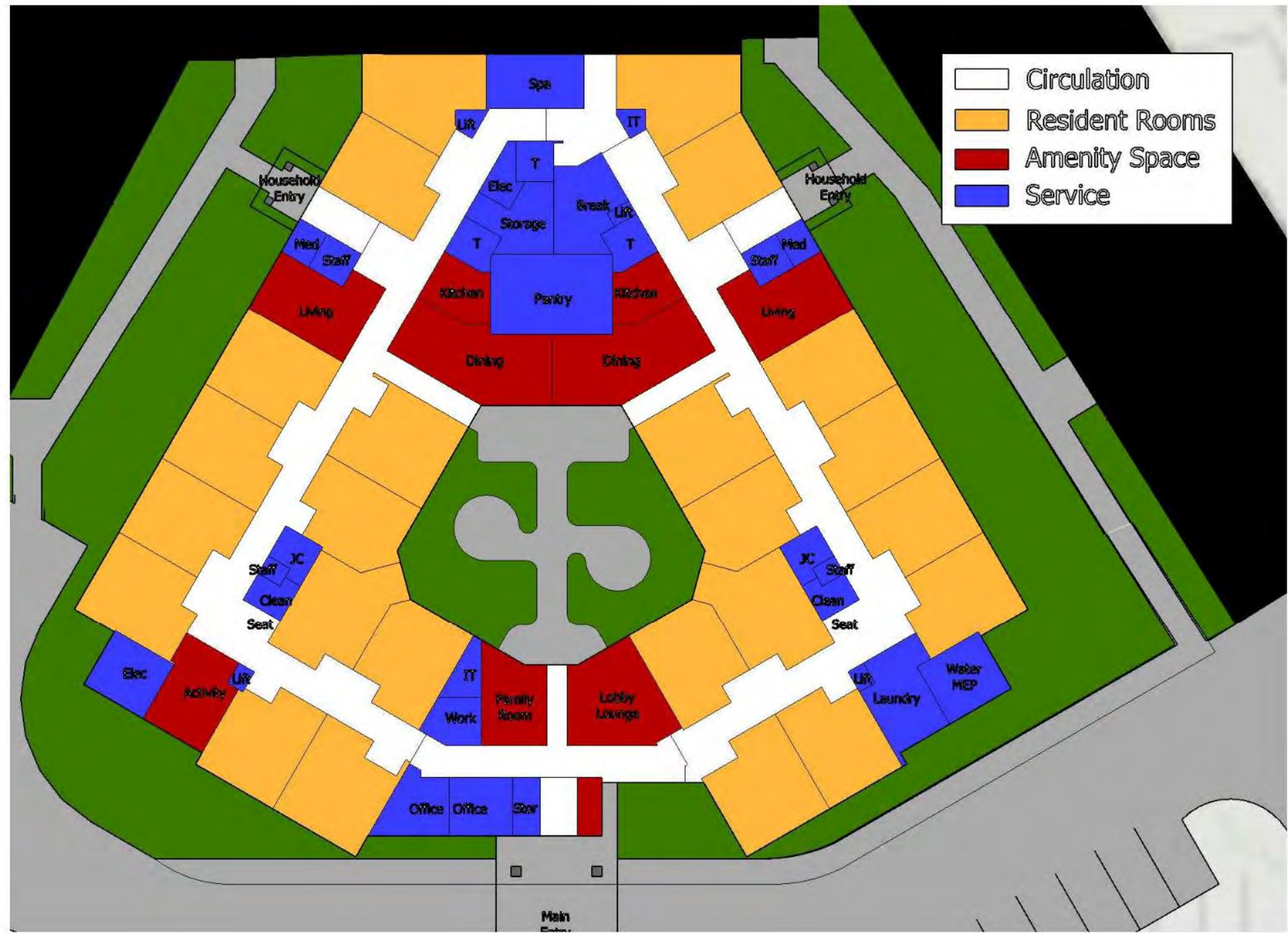


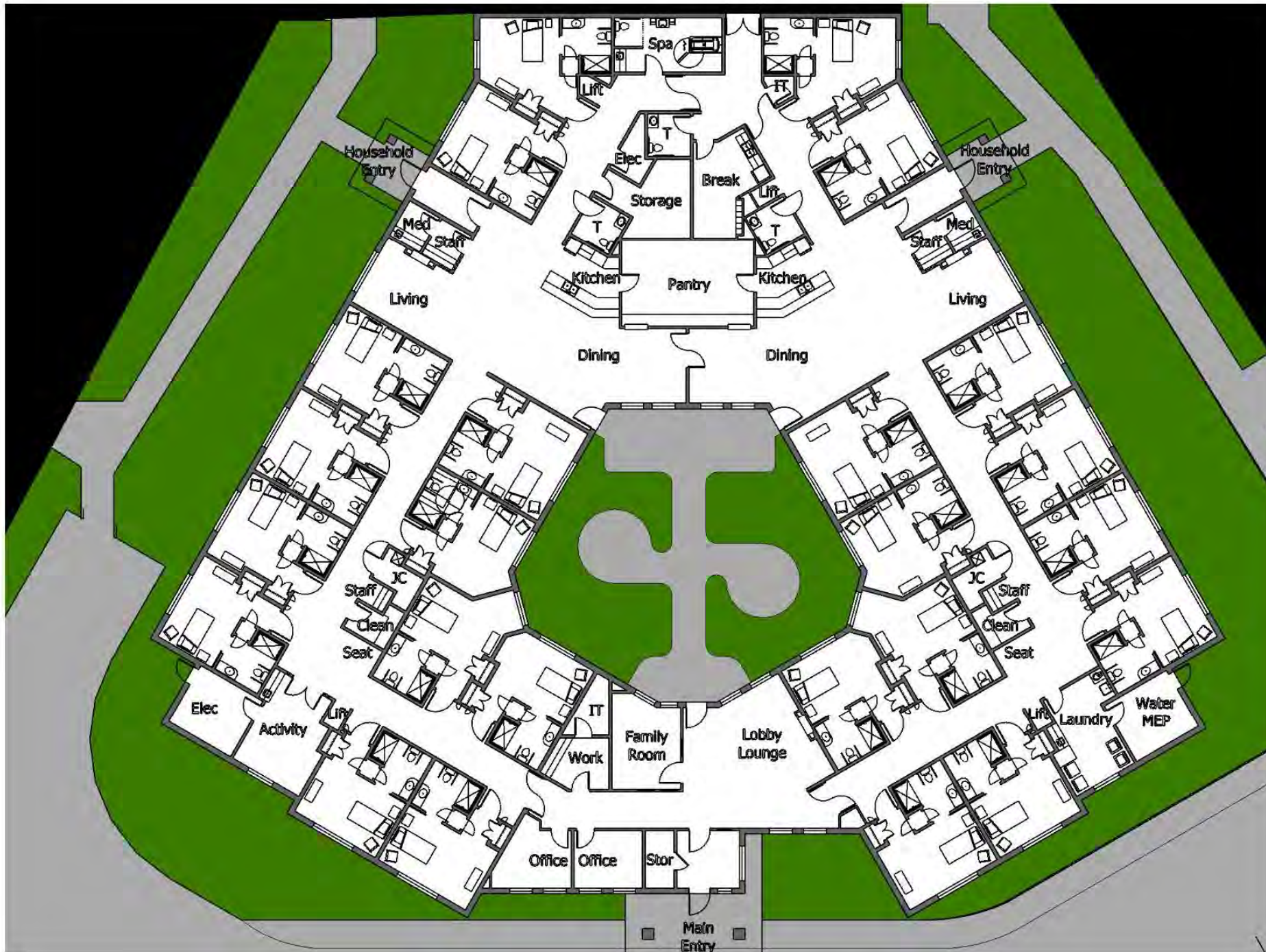
Circulation

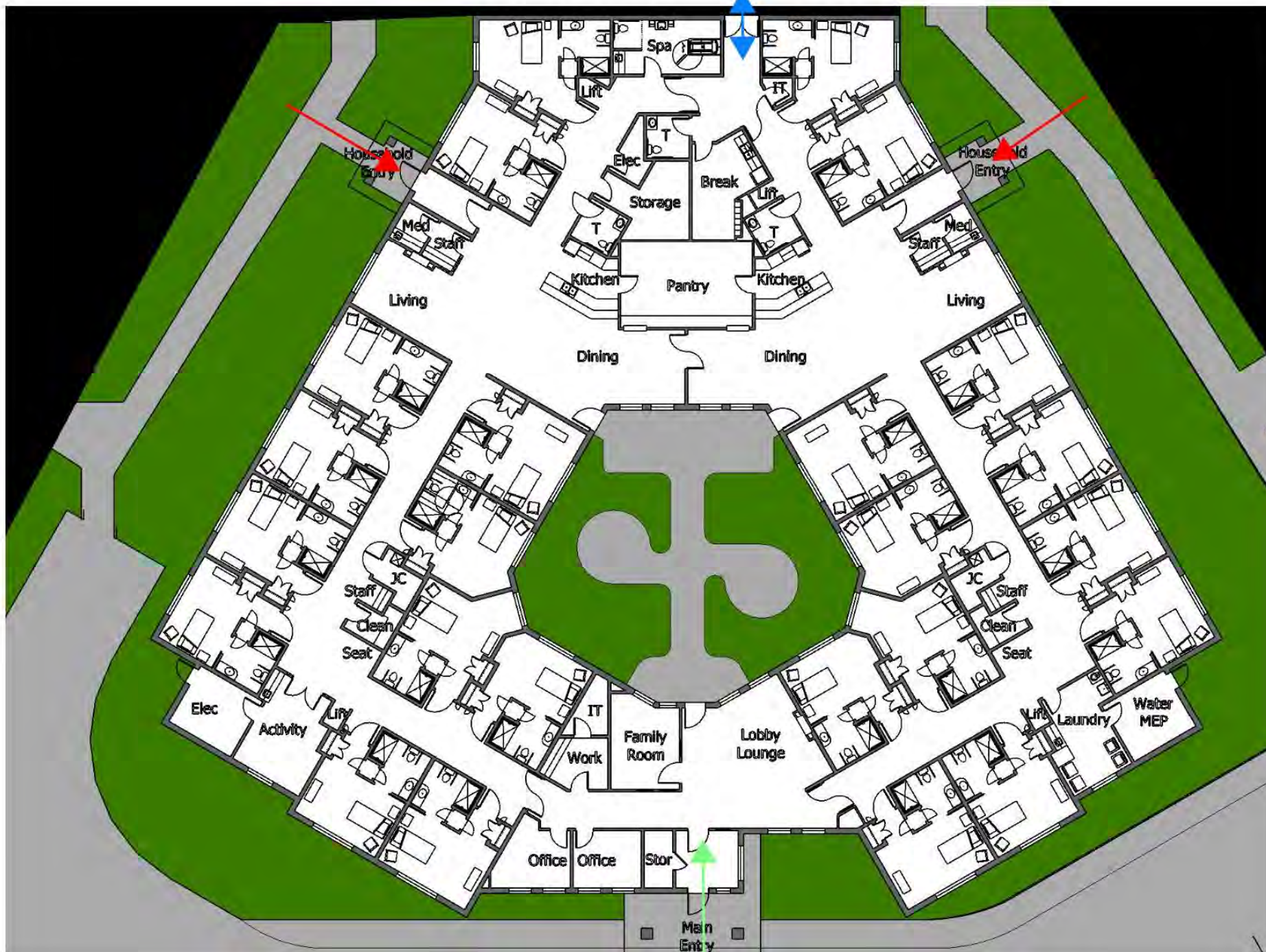
Resident Rooms

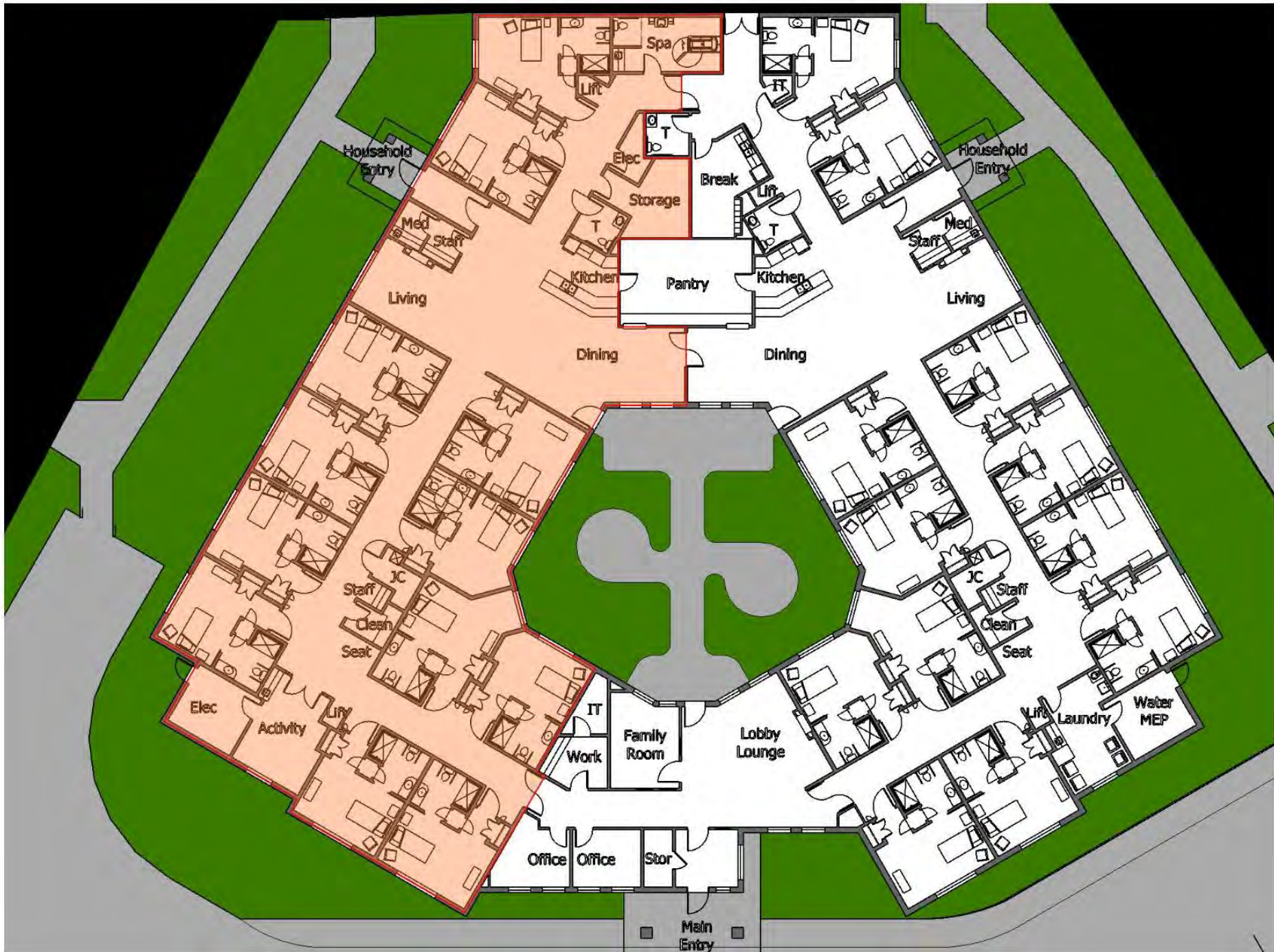
Amenity Space

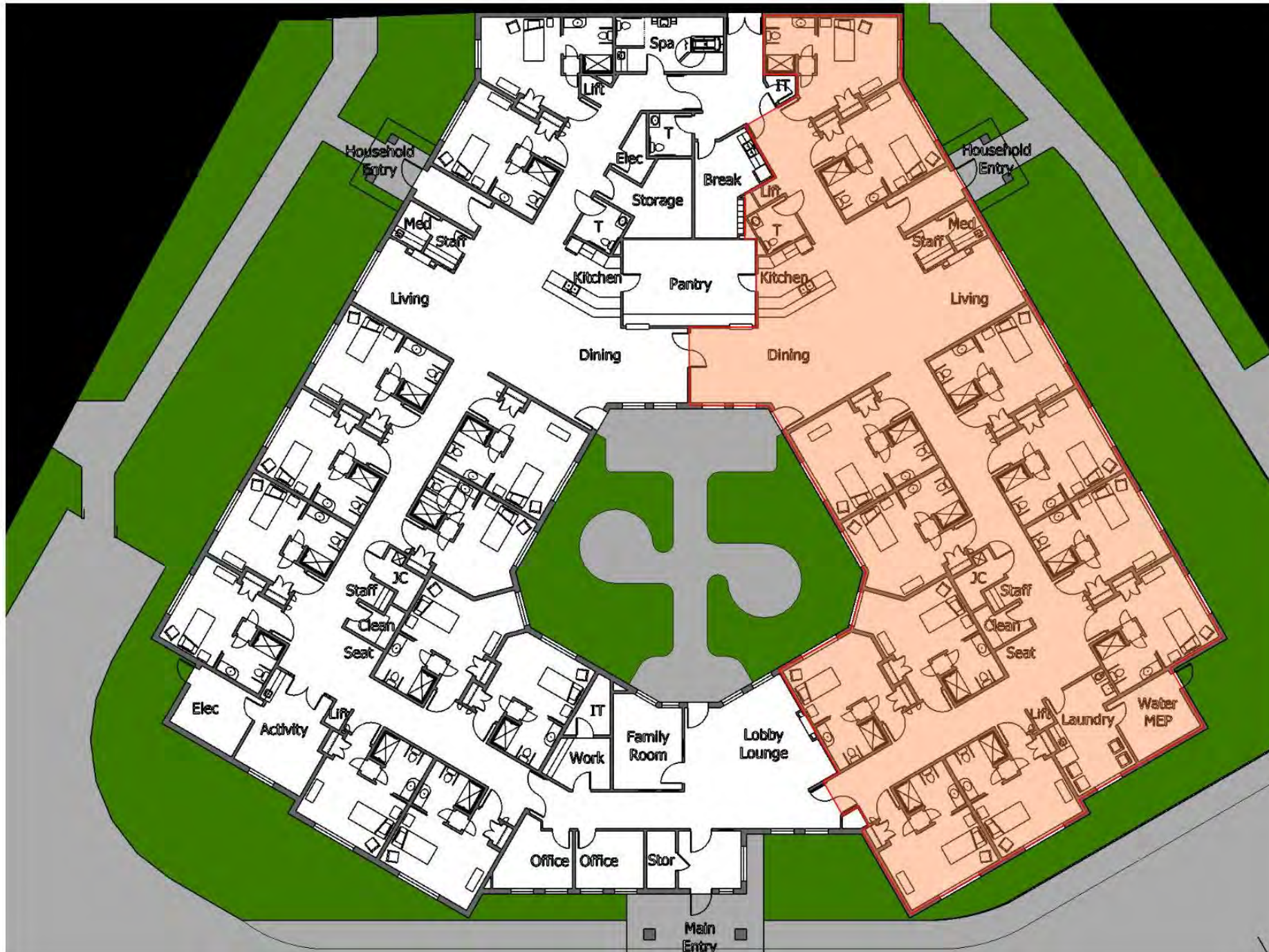
Service

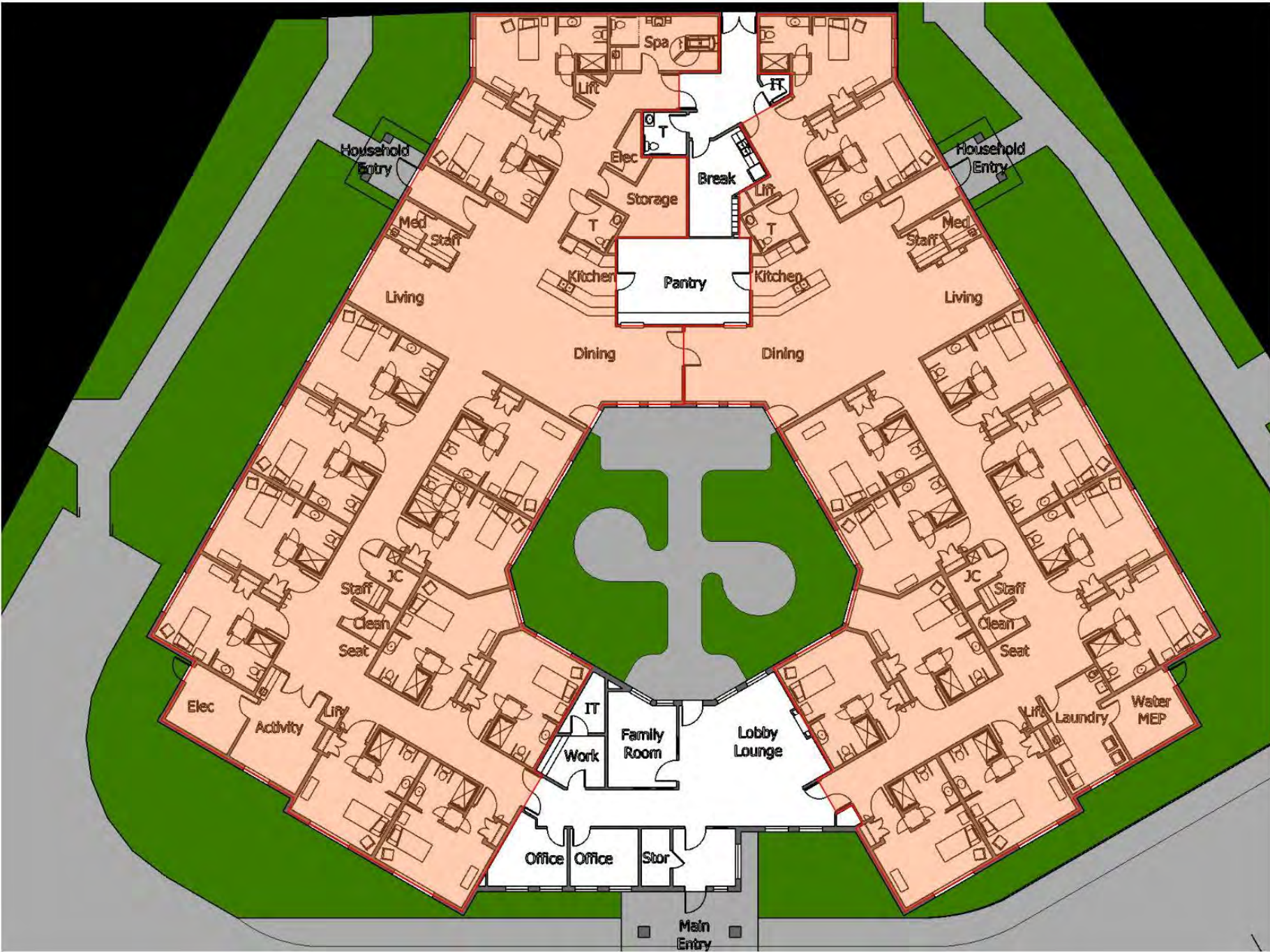


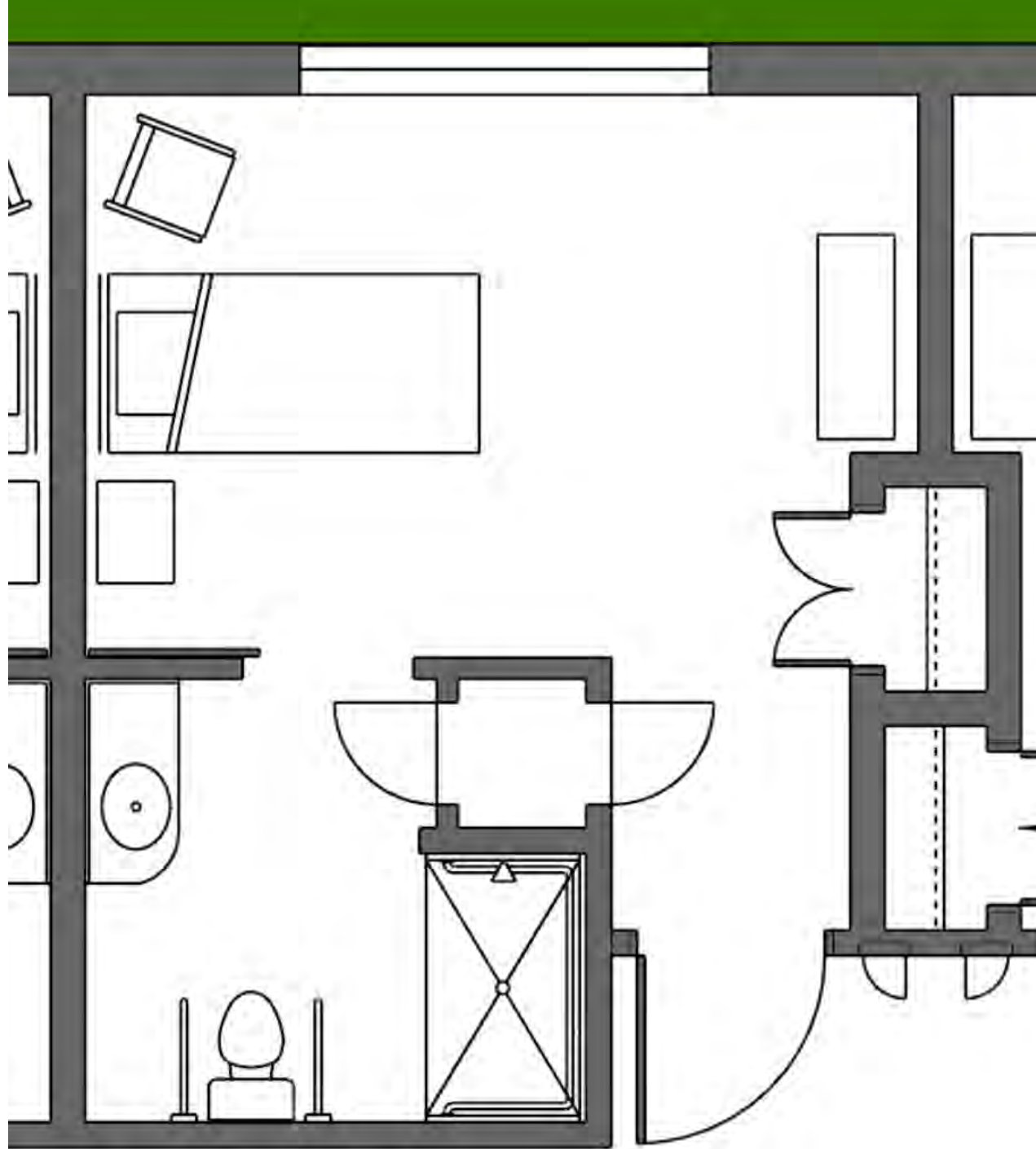












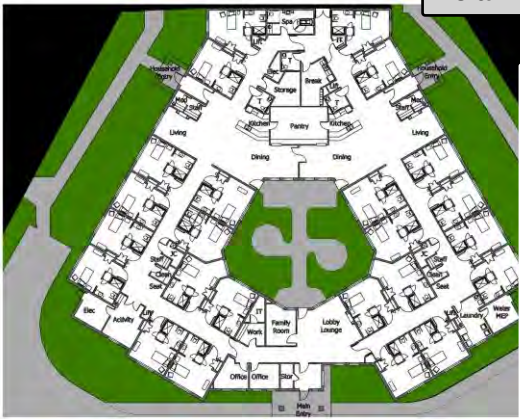


RENDERINGS



5.a.1.e

Attachment: Lasata CBRF RFP & Addendum_2024 (Construction Manager as Advisor



Attachment: Lasata CBRF RFP & Addendum_2024 (Construction Manager as Advisor



Attachment: Lasata CBRF RFP & Addendum_2024 (Construction Manager as Advisor



Lasata Care Center

Potential CBRF Development

We'll get you there.



Attachment: Lasata CBRF RFP & Addendum_2024

INTRODUCTION

5.a.1.e

Management ("Management") of Lasata Care Center (the "Organization" or "Lasata") is in the process of conducting the preliminary analysis of a variety of strategies that it may choose to explore further (along with understanding the effect of changes in key assumptions on the operations of the Organization).

The planning dashboards and analyses included herein have been assembled from information provided by and reviewed by Management and are intended to provide a framework and analysis of the anticipated financial performance of the Organization, including the estimated impact of a number of strategic options and or strategies. The scenarios and analyses included herein are not intended to be a complete analysis of all factors impacting the future financial performance of the Organization. **These analyses are intended for the internal use of the Organization and should not be read by or relied on by other third-party users for any purpose.**

The scenarios are based on assumptions concerning the impact of key assumptions and strategies on future financial performance. The assumptions disclosed herein, while not all-inclusive, are those that Management believes are significant to assess the anticipated financial performance of strategies and are key factors upon which the future financial results depend. In our presentation we may include prepared projected financial statements or the partial presentation of prepared financial projections (the "Prepared Projections"). The Prepared Projections omit the summary of significant accounting policies and may be in the form of a partial presentation that may omit balance sheets or statements of cash flows, and do not purport to be presented in accordance with Generally Accepted Accounting Principles. We have not compiled or examined any of the financial data utilized in the analyses and the Prepared Projections and express no assurance of any kind on it. Furthermore, even if the assumptions disclosed herein were to materialize, there will be differences between projected and actual results, because events and circumstances frequently do not occur as expected, and those differences may be material.

Attachment: Lasata CBRF RFP & Addendum_2024





5.a.1.e

Attachment: Lasata CBRF RFP & Addendum_2024

Master Planning Project Assumptions

We'll get you there.

CPAs | CONSULTANTS | WEALTH ADVISORS

CLA (CliftonLarsonAllen LLP) is an independent network member of CLA Global.
See [CLAGlobal.com/disclaimer](https://claglobal.com/disclaimer). Investment advisory services
provided by CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered

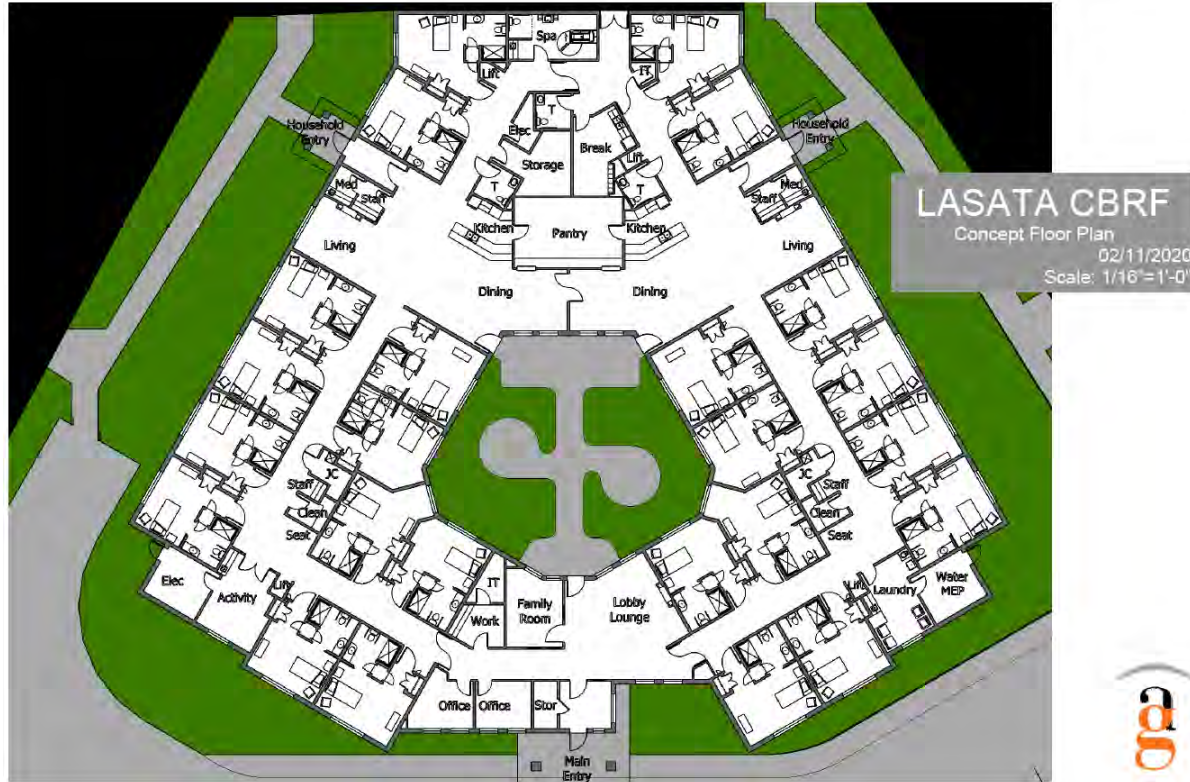
Packet Pg. 102

For Internal Use Only | Private and Confidential | Unexamined - No Assurance Provided

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Concept Design

5.a.1.e

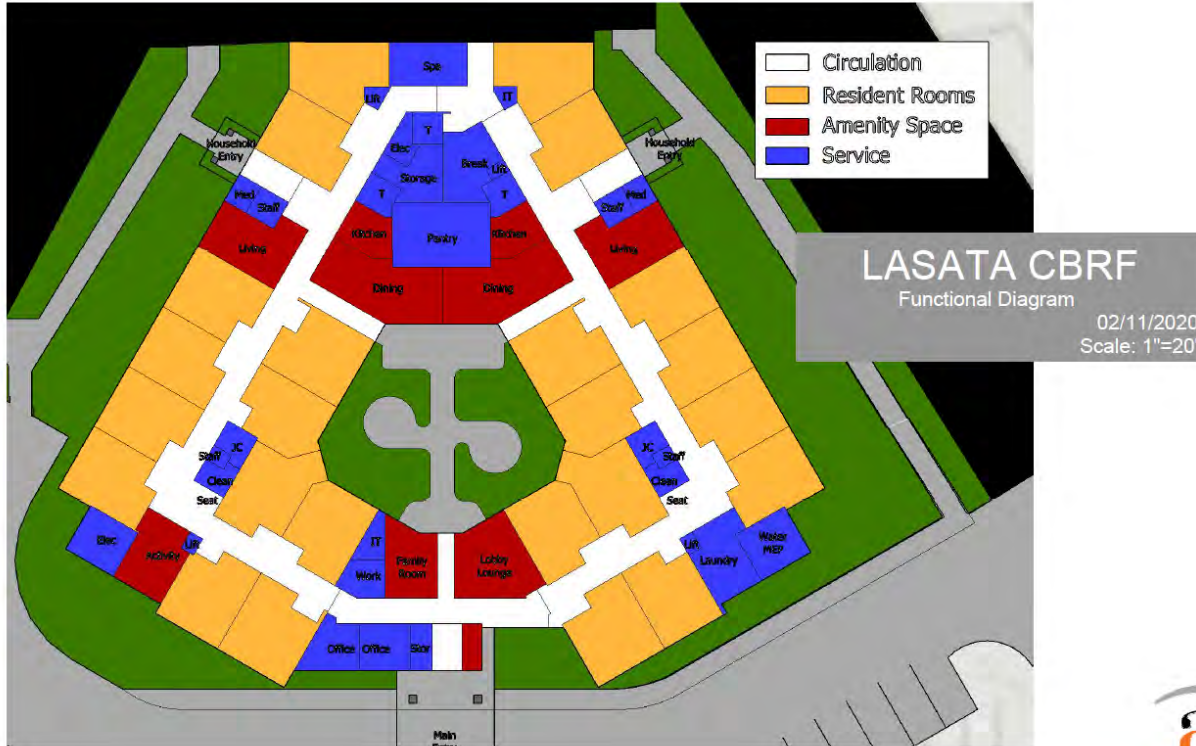


Attachment: Lasata CBRF RFP & Addendum_2024



Concept Design

5.a.1.e



- 24 CBRF licensed resident rooms
- Amenity Space
- Service Space

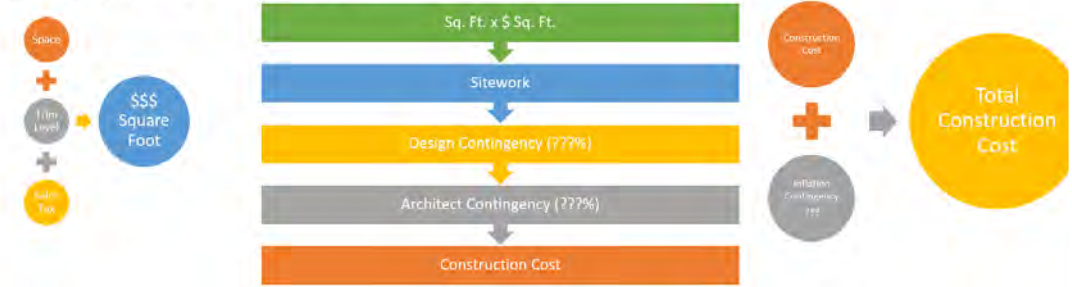
Attachment: Lasata CBRF RFP & Addendum_2024



Project Cost Summary

 Lasata CBRF Budget 2.14.2020	
DESCRIPTION	CBRF
Sitework	\$ 358,294
Concrete	\$ 254,053
Masonry	\$ 104,720
Metals	\$ 47,218
Wood & Plastics	\$ 623,060
Moisture & Thermal Protection	\$ 196,260
Doors & Windows	\$ 237,100
Drywall	\$ 145,160
Acoustical Ceiling	\$ 35,200
Flooring Allowance	\$ 111,345
Painting	\$ 54,435
Miscellaneous & Appliances	\$ 136,205
Conveying Systems	NOT INCLUDED
Fire Protection	\$ 77,116
Plumbing	\$ 181,450
HVAC	\$ 453,625
Electrical	\$ 221,450
Construction Surveying Allowance	\$ 10,000
Construction Materials Testing Allowance	\$ 10,000
Winter Conditions Allowance	\$ 25,000
Temporary Electrical Consumption Allowance	\$ 25,000
Temporary Heat & Equipment Allowance	\$ 50,000
Dehumidification Allowance	\$ 5,000
Permit Allowance	\$ 11,738
General Requirements	\$ 269,874
SUBTOTAL	\$ 3,643,302
Impact Fees	
Construction Management Fee 3.00%	\$ 109,299
Preconstruction Fee	\$ 10,000
Payment and Performance Bond 0.95%	\$ 34,611
	\$ 3,797,212
Contingency (5%)	\$ 189,861
TOTAL COST	\$ 3,987,073
Gross Area (GSF)	18,145
Cost Per GSF	\$219.73

Standardize the defined process to arrive at "Total Construction Cost"



The construction cost was verbally updated in December 2022 to add \$350,000 without impact to project contingencies.

Project to be funded with cash.

Total construction cost \$4,337,073

Attachment: Lasata CBRF RFP & Addendum_2024



Project Modeling Assumptions

Assisted Living Addition	24	<< Units		Debt Issued (incl. cap int)	\$	-
Starting Date	4/1/2023	Occupancy	95%	Cost of Capital		4.50%
Const. Mo.	18	Months to Fill	12	Equity	\$	4,337
Escalation Factor	0.00%	Monthly Service Fee - AL	6,400	Term		40
Const. Cost Adj.	0.0% \$	Profit Margin - AL	40%	Financing Costs		1.00%

Operating expense assumptions:

- Operating expenses are estimated to be 60% of revenue.
- In the initial model these are illustrated as wages, however a full staffing model will be developed in the next phases.
- It is expected that a portion of the operating expenses will be classified as dietary, supplies and other operating expenses.

Project Operating Margin

5.a.1.e

Income Statement						
Years Ending December 31						
(\$ in Thousands)	2025	2026	2027	2028	2029	2030
OPERATING REVENUES						
Independent Living	-	-	-	-	-	-
Assisted Living	1,036	1,971	2,030	2,091	2,154	2,218
Skilled Nursing	-	-	-	-	-	-
Home Health	-	-	-	-	-	-
Amortization of Entrance Fees	-	-	-	-	-	-
Other Income	-	-	-	-	-	-
Adult Day Health	-	-	-	-	-	-
Not Used	-	-	-	-	-	-
0	-	-	-	-	-	-
Total Operating Revenues	1,036	1,971	2,030	2,091	2,154	2,218
Operating Revenue % Change						
Dues - Membership % of Revenue						
OPERATING EXPENSES						
Labor and Benefit Expense	622	1,182	1,218	1,254	1,292	1,331
Non Labor Expense	-	-	-	-	-	-
Real Estate Taxes	-	-	-	-	-	-
Management Fee	-	-	-	-	-	-
Lease Expense	-	-	-	-	-	-
Allocated Corporate Expenses	-	-	-	-	-	-
Other Expense	-	-	-	-	-	-
Total Non Capital Expenses	622	1,182	1,218	1,254	1,292	1,331
Operating EBIDA	415	788	812	836	861	887
Depreciation	157	161	165	169	173	177
Amortization of Issuance Costs	-	-	-	-	-	-
Amortization of Bond (Premium) Discount	-	-	-	-	-	-
Interest Expense	-	-	-	-	-	-
Total Operating Expenses	778	1,343	1,383	1,423	1,465	1,507
Operating Margin	258	628	647	668	689	711
Operating Margin %						

Attachment: Lasata CBRF RFP & Addendum_2024



Project Cash Flow

5.a.1.e

(\$ in Thousands)	2025	2026	2027	2028	2029	2030
CASH FLOWS FROM OPERATIONS						
Change in Unrestricted Net Assets	74	450	491	535	582	631
Add: Depreciation	157	161	165	169	173	177
Bond Issuance Amortization	-	-	-	-	-	-
Amortization of Premium (Discount)	-	-	-	-	-	-
Net Working Capital Needs (Sources)	(11)	(10)	(1)	(1)	(1)	(1)
Amortization of Entrance Fees	-	-	-	-	-	-
Net Cash Received Entrance Fees	-	-	-	-	-	-
Initial Cash Received Entrance Fees	-	-	-	-	-	-
Adjustments to Net Cash Flows: Strategies	-	-	-	-	-	-
Net Cash Flows from Operations	220	601	655	703	754	807
CASH FLOWS FROM INVESTING ACTIVITIES						
Capitalized Property & Equipment	-	-	-	-	-	-
Routine	(61)	(63)	(65)	(67)	(69)	(69)
With Construction Funded in 2014 YE Projects	-	-	-	-	-	-
Existing Construction Funds Used	-	-	-	-	-	-
Other Changes in Noncurrent Assets & Liabilities	-	-	-	-	-	-
Net Cash Flows from Investing Activities	(61)	(63)	(65)	(67)	(69)	(69)
CASH FLOWS FROM FINANCING ACTIVITIES						
Existing Long Term Debt	-	-	-	-	-	-
Project Long Term Debt	-	-	-	-	-	-
Proceeds from New Long Term Debt	-	-	-	-	-	-
Net Transfers (to) from Project Funds	-	-	-	-	-	-
Payment of Financing Costs	-	-	-	-	-	-
Funds Transferred to Debt Reserve Funds	-	-	-	-	-	-
Net Cash Flows from Financing Activities	-	-	-	-	-	-
Total Net Change in Cash and Reserves	159	538	591	637	685	738

Attachment: Lasata CBRF RFP & Addendum_2024





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March 8, 2024

Request for Proposals Notice for Construction Management as Advisor Services for the Construction of a Community Based Residential Facility (CBRF) at the County-Owned Lasata Senior Living Campus in Cedarburg, WI

ADDENDUM #1

Response to Questions:

- 1) Is there a draft contract we could review for the awarded CMaA?

Answer: Ozaukee County anticipates using AIA Document C132-2019 Standard Form of Agreement Between Owner and Construction Manager as Adviser.

- 2) M. Construction Manager shall provide full time Superintendent on site during construction. Can you please clarify this?

Answer: The Construction Manager is to have a full-time Superintendent on-site to oversee any contractors. Ozaukee County anticipates multiple trade contractor bid packages to be bid as prime contractors directly to Ozaukee County.

- 3) The CM to have a Superintendent as well as the GC on site full time?

Answer: The Construction Manager is to have a full-time Superintendent on-site to oversee any contractors. Ozaukee County anticipates multiple trade contractor bid packages to be bid as prime contractors directly to Ozaukee County.

- 4) Could the Construction Administrator also serve as the Superintendent?

Answer: Yes, there is no stipulation against this. But, please elaborate on your project understanding and approach to the scope of services in your proposal, so we are best able to evaluate your approach meeting the needs of the project.

- 5) Will the contract administration be between the Owner and GC or would the CM need to provide AIA Contract Administration?

Answer: Ozaukee County anticipates using AIA Document C132-2019 Standard Form of Agreement Between Owner and Construction Manager as Adviser. Ozaukee County anticipates multiple trade contractor bid packages to be bid as prime contractors directly to Ozaukee County. Bidding to be administered by Construction Manager, with assistance from the architect in developing construction documents. Construction to be overseen by Construction Manager.

Health and Human Services Committee

AGENDA INFORMATION SHEET

AGENDA DATE:	March 26, 2024
DEPARTMENT:	Lasata Campus
DIRECTOR:	Barton Smith
PREPARER:	Christine Kuemmerlein

Agenda Summary Lasata Campus Monthly Reports

ATTACHMENTS:

- Lasata Campus Reports Feb 2024 (PDF)

HEALTH AND HUMAN SERVICES COMMITTEE

Lasata Care Center

February 2024 Monthly Report

Barton Smith

Payor Mix Days	Current Month Actual AVG	YTD actual AVG	Budget
Medicare/MC	14	15	20
Private	31	32	23
Medicaid	30	30	42
Total	75	77	85

Payor Mix	Current Month Actual	YTD actual	Budget
Medicare/MC	19%	20%	24%
Private	41%	41%	27%
Medicaid	40%	39%	49%

Organization and Operations Focus

Website development

Staffing/employee

Agency usage

Open positions

Life Enrichment position filled

Regulatory Updates

Survey audits

Campus Projects and initiatives:

Security cameras

CBRF bidding process

Campus Financials:

Attachment: Lasata Campus Reports Feb 2024 (Lasata Campus Monthly Reports)

LASATA HEIGHTS MONTHLY REPORT**FEBRUARY 2024****Kristen Sonnenberg, Director of Senior Apartments****Census:**

- FEBRUARY census – 52 rented apartments
 - Move ins:
 - One scheduled move in for 2/17 (202)
 - Two scheduled move ins for 3/1/24 (107 and 301)
 - One scheduled move in for 5/1 (305)
 - Two scheduled move ins for 6/1 (114, 206)
 - Move outs:
 - One Tenant gave notice for 4/30 (114)
 - Tenant in apartment 320 will be moving to 308 3/1
 - Tenant in apartment 206 will be downsizing to 208 4/1

Available apartments: 205, 210, 212, 320 (as of 4/1), all A units**Tours:**

- There were 7 tours in the month of FEBRUARY.
 - 3 tours were added to the waiting list for a C and D unit
 - 1 tour is looking for a place that allows pets
 - 3 tours are just starting the process and will be looking at other IL's in the area
- Waiting List- 19 applicants on the waiting list:
 - 19 applicants are waiting for a B, C or D unit (not currently available)

Lasata Crossings Monthly Report**February 2024****Submitted by: Laurel Bath**

- **Census:** As of today, the total census is 51. The group consists of 45 tenants paying privately, 6 are utilizing Family Care.
 - There are 11 open apartments.
 - 10- 1 Bedroom apartments
 - 1-2 Bedroom apartment
- **Admission/Discharges:**
 - 14 Tours were done in February
 - Admissions:
 - 4 Admissions-For February
 - 1 scheduled admission for March
 - 2 scheduled admissions for April
 - Discharges:
 - There were Zero discharges in February
- **Planned admissions**
 - There are 6 scheduled Admissions at this time for February!! 😊
 - There are already 2 planned Admissions for March. 😊

Open Staff Positions:

- **AM Shift:** There is one part time and one full time opening on AM Shift
- **Cook:** The Cook position remains open. Struggling with candidates showing up for scheduled interviews
- **PM Shift:** There is a short shift opening on PM Shift
- **NOC shift:** There are no openings on Night Shift.
- **Waiting List:**
- There are 6 individuals on the waiting list for Family Care Studio apartments.
- There are 16 individuals (this includes 3 couples) on our waiting list for one- and two-bedroom apartments; 5 of these are on the inactive list.
 - *Wait List: Application and \$500 fee (refundable) on file*
 - *Inactive List: Name on list; application complete and refundable fee on file but they prefer we not contact them.*
 - *Current residents and tenants on campus do not submit a waitlist fee.*

Ozaukee County Committee Report
Enterprise Fund Lasata Care Center
For the Two Months Ending Thursday, February 29, 2024
Profit and Loss Statement ACTUAL TO AMENDED BUDGET

	Current Month Actual	2024 YTD Actual	2024 Amended Budget	Budget Balance	% Budget YTD
Revenues					
Public Charges for Services	\$1,031,854	\$2,185,183	\$13,291,606	\$11,106,423	16.44%
Interest Revenue	\$4	\$4	-	(\$4)	0.00%
Other Revenue	(\$4,118)	\$2,788	\$859,650	\$856,862	0.32%
Total Revenues	\$1,027,740	\$2,187,975	\$14,151,256	\$11,963,281	15.46%
Expenditures					
Salaries	\$545,839	\$836,305	\$7,733,143	\$6,896,838	10.81%
Fringe Benefits	\$159,303	\$356,828	\$2,549,451	\$2,192,623	14.00%
Travel/Training	\$275	\$275	\$12,000	\$11,725	2.29%
Supplies	\$37,497	\$80,204	\$508,148	\$427,944	15.78%
Purchased Services	\$162,576	\$362,935	\$1,891,265	\$1,528,330	19.19%
Interdepartment Charges	\$21,320	\$43,156	\$515,076	\$471,920	8.38%
Depreciation	\$65,250	\$130,500	\$828,000	\$697,500	15.76%
Debt Service	-	-	\$50,800	\$50,800	0.00%
Other Expenses	\$52,343	\$108,228	\$678,767	\$570,539	15.94%
Total Operating Expenditures	\$1,044,403	\$1,918,431	\$14,766,650	\$12,848,219	12.99%
Capital Outlay					
Equipment & Furniture	\$5,761	\$12,332	\$90,000	\$77,668	13.70%
Buildings & Land	-	-	\$45,000	\$45,000	0.00%
Contra	-	-	(\$135,000)	(\$135,000)	0.00%
Total Capital Outlay	\$5,761	\$12,332	-	(\$12,332)	0.00%
Total Expenditures	\$1,050,164	\$1,930,763	\$14,766,650	\$12,835,887	13.08%
Other Finance (Sources)	-	-	(\$615,394)	(\$615,394)	0.00%
Net Other Financing Sources/Uses	-	-	(\$615,394)	(\$615,394)	0.00%
Net Increase (Decrease)	(\$22,424)	\$257,212	-	(\$257,212)	0.00%

Equity:

Attachment: Lasata Campus Reports Feb 2024 (Lasata Campus Monthly Reports)

Ozaukee County Committee Report
Enterprise Fund Lasata Heights
 For the Two Months Ending Thursday, February 29, 2024
 Profit and Loss Statement ACTUAL TO AMENDED BUDGET

	Current Month Actual	2024 YTD Actual	2024 Amended Budget	Budget Balance	% Budget YTD
Revenues					
Public Charges for Services	\$91,514	\$182,085	\$1,153,542	\$971,457	15.78%
Other Revenue	-	\$183	\$1,091	\$908	16.77%
Total Revenues	\$91,514	\$182,268	\$1,154,633	\$972,365	15.79%
Expenditures					
Salaries	\$20,146	\$33,472	\$249,010	\$215,538	13.44%
Fringe Benefits	\$8,554	\$22,737	\$114,825	\$92,088	19.80%
Travel/Training	-	-	\$1,000	\$1,000	0.00%
Supplies	\$226	\$455	\$74,980	\$74,525	0.61%
Purchased Services	\$11,567	\$36,389	\$268,016	\$231,627	13.58%
Interdepartment Charges	\$1,015	\$2,524	\$15,583	\$13,059	16.20%
Depreciation	\$18,377	\$36,754	\$223,000	\$186,246	16.48%
Other Expenses	\$2,839	\$13,029	\$51,786	\$38,757	25.16%
Total Operating Expenditures	\$62,724	\$145,360	\$998,200	\$852,840	14.56%
Capital Outlay					
Buildings & Land	\$8,256	\$8,256	\$45,000	\$36,744	18.35%
Contra	-	-	(\$45,000)	(\$45,000)	0.00%
Total Capital Outlay	\$8,256	\$8,256	-	(\$8,256)	0.00%
Total Expenditures	\$70,980	\$153,616	\$998,200	\$844,584	15.39%
Other Finance Uses	-	-	\$156,433	\$156,433	0.00%
Net Other Financing Sources/Uses	-	-	\$156,433	\$156,433	0.00%
Net Increase (Decrease)	\$20,534	\$28,652	-	(\$28,652)	0.00%

Equity:

Attachment: Lasata Campus Reports Feb 2024 (Lasata Campus Monthly Reports)

Ozaukee County Committee Report
Enterprise Fund Lasata RCAC
For the Two Months Ending Thursday, February 29, 2024
Profit and Loss Statement ACTUAL TO AMENDED BUDGET

	Current Month Actual	2024 YTD Actual	2024 Amended Budget	Budget Balance	% Budget YTD
Revenues					
Public Charges for Services	\$252,790	\$485,183	\$3,182,784	\$2,697,601	15.24%
Other Revenue	\$104	\$4,137	\$8,000	\$3,863	51.71%
Total Revenues	\$252,894	\$489,320	\$3,190,784	\$2,701,464	15.34%
Expenditures					
Salaries	\$91,521	\$140,700	\$1,047,364	\$906,664	13.43%
Fringe Benefits	\$33,849	\$84,902	\$405,503	\$320,601	20.94%
Travel/Training	-	-	\$1,000	\$1,000	0.00%
Supplies	\$12,377	\$25,430	\$176,650	\$151,220	14.40%
Purchased Services	\$25,793	\$63,076	\$379,375	\$316,299	16.63%
Interdepartment Charges	\$4,211	\$8,915	\$56,477	\$47,562	15.79%
Depreciation	\$30,287	\$60,574	\$365,900	\$305,326	16.55%
Debt Service	-	-	\$173,425	\$173,425	0.00%
Other Expenses	\$3,657	\$15,298	\$126,129	\$110,831	12.13%
Total Operating Expenditures	\$201,695	\$398,895	\$2,731,823	\$2,332,928	14.60%
Capital Outlay					
Equipment & Furniture	-	-	\$15,000	\$15,000	0.00%
Buildings & Land	-	-	\$30,000	\$30,000	0.00%
Contra	-	-	(\$45,000)	(\$45,000)	0.00%
Total Expenditures	\$201,695	\$398,895	\$2,731,823	\$2,332,928	14.60%
Other Finance Uses	-	-	\$458,961	\$458,961	0.00%
Net Other Financing Sources/Uses	-	-	\$458,961	\$458,961	0.00%
Net Increase (Decrease)	\$51,199	\$90,425	-	(\$90,425)	0.00%

Equity:

Attachment: Lasata Campus Reports Feb 2024 (Lasata Campus Monthly Reports)

Health and Human Services Committee**AGENDA INFORMATION SHEET**

AGENDA DATE:	March 26, 2024
DEPARTMENT:	Veterans Service
DIRECTOR:	Kevin Johnson
PREPARER:	Tyler Quaas

Agenda Summary Veterans Service Report

ATTACHMENTS:

- Veterans Service Report (PDF)

HEALTH AND HUMAN SERVICES COMMITTEE

Ozaukee County Committee Report
General Fund Veterans Services
 For the Two Months Ending Thursday, February 29, 2024
 Profit and Loss Statement ACTUAL TO AMENDED BUDGET

	Current Month Actual	2024 YTD Actual	2024 Amended Budget	Budget Balance	% Budget YTD
Revenues					
Intergovernmental Revenues	-	-	\$20,000	\$20,000	0.00%
Public Charges for Services	-	\$160	\$1,500	\$1,340	10.67%
Interest Revenue	\$94	\$199	\$50	(\$149)	398.00%
Total Revenues	\$94	\$359	\$21,550	\$21,191	1.67%
Expenditures					
Salaries	\$13,376	\$19,761	\$167,194	\$147,433	11.82%
Fringe Benefits	\$5,721	\$11,506	\$53,929	\$42,423	21.34%
Travel/Training	\$747	\$747	\$10,800	\$10,053	6.92%
Supplies	-	\$50	\$1,100	\$1,050	4.55%
Purchased Services	\$199	\$398	\$3,690	\$3,292	10.79%
Interdepartment Charges	\$617	\$1,250	\$8,716	\$7,466	14.34%
Grants	-	-	\$5,000	\$5,000	0.00%
Other Expenses	\$4,956	\$4,956	\$7,500	\$2,544	66.08%
Total Operating Expenditures	\$25,616	\$38,668	\$257,929	\$219,261	14.99%
Capital Outlay					
Total Expenditures	\$25,616	\$38,668	\$257,929	\$219,261	14.99%
Net Increase (Decrease)	(\$25,522)	(\$38,309)	(\$236,379)	(\$198,070)	16.21%

Equity:

Attachment: Veterans Service Report (Veterans Service Report)

Health and Human Services Committee**AGENDA INFORMATION SHEET**

AGENDA DATE:	March 26, 2024
DEPARTMENT:	Public Health
DIRECTOR:	Kim Buechler
PREPARER:	Tyler Quaas

Agenda Summary Public Health Report

ATTACHMENTS:

- Public Health Financials (PDF)

HEALTH AND HUMAN SERVICES COMMITTEE

Ozaukee County Committee Report
Special Revenue Fund Public Health
 For the Two Months Ending Thursday, February 29, 2024
 Profit and Loss Statement ACTUAL TO AMENDED BUDGET

	Current Month Actual	2024 YTD Actual	2024 Amended Budget	Budget Balance	% Budget YTD
Revenues					
Taxes	-	-	\$520,702	\$520,702	0.00%
Intergovernmental Revenues	-	-	\$772,921	\$772,921	0.00%
Public Charges for Services	\$530	\$549	\$33,500	\$32,951	1.64%
Intergovernmental Charges	-	\$195,265	\$866,060	\$670,795	22.55%
Interdepartmental Charges	\$1,667	\$3,333	\$20,000	\$16,667	16.67%
Licenses & Permits	\$5,896	\$7,195	\$473,653	\$466,458	1.52%
Other Revenue	\$136	\$164	\$500	\$336	32.80%
Total Revenues	\$8,229	\$206,506	\$2,687,336	\$2,480,830	7.68%
Expenditures					
Salaries	\$135,938	\$204,883	\$1,858,084	\$1,653,201	11.03%
Fringe Benefits	\$51,966	\$125,102	\$651,395	\$526,293	19.21%
Travel/Training	\$625	\$888	\$76,302	\$75,414	1.16%
Supplies	\$825	\$8,266	\$123,748	\$115,482	6.68%
Purchased Services	\$13,887	\$27,535	\$144,960	\$117,425	18.99%
Interdepartment Charges	-	\$1,041	\$9,000	\$7,959	11.57%
Other Expenses	\$64,718	\$95,594	\$120,658	\$25,064	79.23%
Total Operating Expenditures	\$267,959	\$463,309	\$2,984,147	\$2,520,838	15.53%
Capital Outlay					
Equipment & Furniture	-	\$147,605	-	(\$147,605)	0.00%
Total Capital Outlay	-	\$147,605	-	(\$147,605)	0.00%
Total Expenditures	\$267,959	\$610,914	\$2,984,147	\$2,373,233	20.47%
Other Finance (Sources)	-	-	(\$296,811)	(\$296,811)	0.00%
Net Other Financing Sources/Uses	-	-	(\$296,811)	(\$296,811)	0.00%
Net Increase (Decrease)	(\$259,730)	(\$404,408)	-	\$404,408	0.00%

Equity:

Attachment: Public Health Financials (Public Health Report)

Health and Human Services Committee**AGENDA INFORMATION SHEET**

AGENDA DATE:	March 26, 2024
DEPARTMENT:	Human Services
DIRECTOR:	Liza Drake
PREPARER:	Brad Mueller

Agenda Summary HS/Aging/ADRC Financial Report - Feb 2024

ATTACHMENTS:

- HS Aging ADRC Comm Rpt Feb 24 (PDF)

HEALTH AND HUMAN SERVICES COMMITTEE

Ozaukee County Committee Report
Human Services with ADRC and Aging Service
 For the Two Months Ending Thursday, February 29, 2024
 Profit and Loss Statement ACTUAL TO AMENDED BUDGET

	Current Month Actual	2024 YTD Actual	2024 Amended Budget	Budget Balance	% Budget YTD
Revenues					
Taxes	-	-	\$4,511,407	\$4,511,407	0.00%
Intergovernmental Revenues	\$137,217	\$181,178	\$9,532,644	\$9,351,466	1.90%
Public Charges for Services	(\$108,049)	\$139,096	\$3,102,062	\$2,962,966	4.48%
Interdepartmental Charges	-	-	\$9,546	\$9,546	0.00%
Other Revenue	\$2,187	\$2,562	\$31,500	\$28,938	8.13%
Total Revenues	\$31,355	\$322,836	\$17,187,159	\$16,864,323	1.88%
Expenditures					
Salaries	\$562,960	\$844,119	\$7,228,829	\$6,384,710	11.68%
Fringe Benefits	\$211,217	\$511,913	\$2,723,662	\$2,211,749	18.80%
Travel/Training	\$7,800	\$8,026	\$143,650	\$135,624	5.59%
Supplies	\$6,567	\$40,871	\$153,975	\$113,104	26.54%
Purchased Services	\$533,432	\$576,647	\$5,736,030	\$5,159,383	10.05%
Interdepartment Charges	\$38,967	\$79,759	\$551,056	\$471,297	14.47%
Grants	\$13,125	\$26,250	\$174,600	\$148,350	15.03%
Other Expenses	\$12,366	\$13,504	\$767,784	\$754,280	1.76%
Total Operating Expenditures	\$1,386,434	\$2,101,089	\$17,479,586	\$15,378,497	12.02%
Capital Outlay					
Total Expenditures	\$1,386,434	\$2,101,089	\$17,479,586	\$15,378,497	12.02%
Other Finance (Sources)	-	-	(\$292,427)	(\$292,427)	0.00%
Net Other Financing Sources/Uses	-	-	(\$292,427)	(\$292,427)	0.00%
Net Increase (Decrease)	(\$1,355,079)	(\$1,778,253)	-	\$1,778,253	0.00%

Equity:

Attachment: HS Aging ADRC Comm Rpt Feb 24 (HS/Aging/ADRC Financial Report - Feb 2024)