

Ballpark Commons

Good Faith Efforts to Meet Inclusion Goal

Ballpark Commons is a multi-phase development project that consist of five phases: Master Site Work, Office Building (C1), Indoor Sports facility, Outdoor Stadium, and Golf Complex. This report includes information on the inclusion achieved for construction, professional services, and apprentice for the Master Site Work and Office Building (C1) projects.

Inclusion Goals

The Ballpark Commons Project is subject to the Community Benefits Compliance Plan with Milwaukee County. This Project must make a good faith effort to meet the following inclusion requirements:

1. 17% Professional Service spending with Targeted Business Enterprises (“TBE”).
2. 25% construction spending with Disadvantaged Business Enterprise (DBE), Small Business Enterprise (SBE), Minority Business Enterprise (MBE) and/or Women Business Enterprise (WBE) herein after referred to as Targeted Business Enterprise (“TBE”).
3. 10% of the on-site construction trade labor hours to be performed by apprentices or members of acceptable job training programs (“OJT”).

Project Address:	7900 Crystal Ridge Road, Franklin, WI, 53132				
Project	Master Site Work	Office Building (C1)	Outdoor Stadium	Support Buildings	Combined Projects
Professional Services Cost Subject to Inclusion:	\$4,567,469	\$6,058,736	\$4,068,082		\$14,694,287
TBE Professional Services Inclusion:	\$2,771,099 or 60.7%	\$62,165 or 1%	\$45,003 or 1.1%		\$2,878,267 or 19.6%
Construction Manager:	Marso Construction	Stevens Construction	Marso Construction	Stevens Construction	
Construction Cost Subject to Inclusion:	\$25,554,603 ¹	\$6,058,736	\$9,004,248 ²	\$5,605,365	\$46,222,952
TBE Construction Inclusion:	\$160,500 or 0.6%	\$1,937,472 or 32.0%	\$24,669 or 0.3%	\$248,225 or 4.4%	\$2,370,866 or 5.1%
Apprentices Inclusion	14% of Total Hours Worked	6% of Total Hours Worked	8% of Total Hours Worked	9% of Total Hours Worked	10.7% of Total Hours Worked

¹ This amount includes Marso Construction's contract amount of \$23,553,750.82 and \$1,987,532 categorized as construction costs handled by Roc Ventures, LLC.

² This amount includes Marso Construction's contract amount of \$8,057,096.06 and \$930,254.00 categorized as construction costs handled by Roc Ventures, LLC.

Professional Services Inclusion:

The combined inclusion achieved on the projects underway is 19.6%, which exceeds the 17% professional services goal, as shown on the table below:

PROJECT	INCLUSION GOAL	INCLUSION	COST SUBJECT TO INCLUSION	%	TBE PAYMENTS THRU 5/31/2019	TOTAL PAYMENTS	%
Master Site Work	17%	\$ 2,771,099	\$ 4,567,469	60.7%	\$ 2,434,297	\$ 2,463,349	98.8%
Office Building (C1)	17%	\$ 62,165	\$ 6,058,736	1.0%	\$ 22,439	\$ 237,998	9.4%
Outdoor Stadium & Support Buildings	17%	\$ 45,003	\$ 4,068,082	1.1%	\$ 20,003	\$ 20,003	100.0%
Total		\$ 2,878,267	\$ 14,694,287	19.6%	\$ 2,476,738	\$ 2,721,350	91.0%

Construction Inclusion:

Even with the extensive outreach activities outlined below and supported with documentation, the combined inclusion on the construction projects have not achieved the TBE goals.

PROJECT	CONSTRUCTION MANAGER	INCLUSION	COST SUBJECT TO INCLUSION	%	TBE PAYMENTS THRU 5/31/2019	TOTAL PAYMENTS	%
Master Site Work	Marso Construction	\$ 160,500	\$ 25,554,603	0.6%	\$ 9,593	\$ 15,360,726	0.1%
Office Building (C1)	Stevens Construction	\$ 1,937,472	\$ 6,058,736	32.0%	\$ 1,402,987	\$ 5,310,312	26.4%
Outdoor Stadium	Marso Construction	\$ 24,669	\$ 9,004,248	0.3%	\$ -	\$ 5,772,909	0.0%
Support Buildings	Stevens Construction	\$ 248,225	\$ 5,605,365	4.4%	\$ 60,800	\$ 3,256,339	1.9%
Total		\$ 2,370,866	\$ 46,222,952	5.1%	\$ 1,473,380	\$ 29,700,287	5.0%

This report summarizes the Good Faith Effort made by the Developer to meet the TBE Inclusion Goals on the Construction of the projects and request consideration of recommendations to increase the combined TBE inclusion.

A. Outreach to Targeted Business Enterprise (“TBE”) Firms

Roc Ventures hired Cross Management Services, Inc. (“CMSI”) to serve as Inclusion Consultant. CMSI assisted the Construction Managers with outreach by providing lists of TBE firms and Ethnic Chambers and organizations. The TBE firms and Ethnic Chambers received the Invitation to Bid notice. Plans and specifications were delivered to the offices of the Ethnic Chambers and Organizations. Appendices I – XV provide copies of information supporting outreach efforts made to achieve bids from TBE firms.

These efforts resulted in the Office Building (C1) exceeding the TBE goals. Unfortunately, the Master Site Work, Stadium and Support Building Projects do not meet the TBE goals.

B. Construction Cost Subject to Inclusion

Several construction trades or material suppliers do not have TBE firms that perform the service or supply the materials. Therefore, TBE inclusion cannot be achieved on those items. Those items include:

- Fees paid for insurance
- Permit fees paid to municipalities
- Materials purchased direct from the Manufacturer
- Construction Manager fee
- General Conditions
- Payments to regulated Utility Companies (We-Energies)
- Methane Gas Remediation
- Construction Costs related to the South Side of Rawson Avenue (This Master Site work does not occur on land purchased from Milwaukee County)

We, respectfully, request that the value of those items is excluded from the Construction Cost Subject to Inclusion. Appendices XVI – XVIII provides a detail list of the items for which exclusion is sought Master Site Work, Office Building (C1), Stadium, and Support Buildings projects.

Project Name	Proposed CCSI	TBE Inclusion	%
Master Site Work	\$ 16,519,931	\$ 160,500	1.0%
Office Building (C1)	\$ 6,058,736	\$ 1,937,472	32.0%
Stadium	\$ 7,335,551	\$ 24,669	0.3%
Support Buildings	\$ 4,519,369	\$ 248,225	5.5%
Total	\$ 34,433,587	\$ 2,370,866	6.9%

C. Exclude Master Site Work

Very few TBE firms expressed an interest bidding the Master Site Work project. Only one TBE firm, Rams Contracting Ltd., attended the pre-bid meeting and chose not to submit a bid. Completely excluding the master site work from TBE inclusion increased the overall project inclusion to 12.3%.

Project Name	Proposed CCSI	TBE Inclusion	%
Office Building (C1)	\$ 6,058,736	\$ 1,937,472	32.0%
Stadium	\$ 7,335,551	\$ 24,669	0.3%
Support Buildings	\$ 4,519,369	\$ 248,225	5.5%
Total	\$ 17,913,656	\$ 2,210,366	12.3%

D. TBE Inclusion on Other Projects

The Developer and Construction Managers have solicited bids and awarded contracts valued at \$892,026 to TBE firms on the New Perspective Project. This project is south of the Ballpark Commons site and not subject to TBE inclusion goals. The solicitation and awarding of contracts to TBE firms supports to Developers and Construction Managers commitment to TBE inclusion and desire to make-up any shortfall of the dollar value of contracts awarded to TBE firms on the Ballpark Commons projects.

Project Name	Proposed CCSI	TBE Inclusion	%
Office Building (C1)	\$ 6,058,736	\$ 1,937,472	32.0%
Stadium	\$ 7,335,551	\$ 24,669	0.3%
Support Buildings	\$ 4,519,369	\$ 248,225	5.5%
Total	\$ 17,913,656	\$ 2,210,366	12.3%
New Perspective		\$ 892,026	
Combined Totals	\$ 17,913,656	\$ 3,102,392	17.3%

E. TBE Spending

With the inclusion of the TBE spend on the New Perspective project, contracts valued at over \$3.1 million have been awarded to TBE firms.

F. Future TBE Project

Two projects, Golf and Indoor Sports Center, with an expected cost of \$60 million will be built to complete the development. The construction components are similar to the Office Building (C1) which exceeded the TBE inclusion goals. A good faith effort with extensive outreach to TBE firms will be undertaken to meet or exceed the 25% TBE goal on those upcoming projects.

Summary

Roc Ventures and its' Construction Managers and Inclusion Consultant has implemented activities to maximize spend with TBE firms. Although these efforts have fallen short of the 25% inclusion goal for construction, Roc Ventures requests consideration of the following and reduction of the combined inclusion goal to 17.3%:

- Extensive Outreach Activities to solicit bids from TBE firms
- Adjustment to the Construction Costs by excluding the costs of trades or materials lacking TBE firms
- Exclude the Master Site Work as a project subject to the Inclusion Goals
- Including dollars spent with TBE firms on project not subject to the Milwaukee County Compliance Plan