



Department of City Development  
 City Plan Commission  
 Redevelopment Authority of the City of Milwaukee  
 Neighborhood Improvement Development Corporation

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**DUE DATE: 10/10/2014**

**BIDDING  
DOCUMENTS**

Scope of Work and Specifications  
for  
Remodeling and Repairs

**CONTRACTOR NOTE: Please respect the privacy of NIDC clients, and visit properties only if you have first contacted the owner by phone, and have confirmed an appointment with the owner of the property. Showing up un-announced is not acceptable.**

at  
2201-2203 N 16TH ST  
Milwaukee, WI 53205-1217

Kim Hollins's Property  
372-9917

Bids for this Project  
are being solicited for  
the following contractor types:

***lind Rehab Loan Program***

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**NOTE: Please contact Jeff Keen at (414) 286-8604 for new Rehab Specifications.  
ONLY ONE COPY PER CONTRACTOR.**



## GENERAL BID CONDITIONS AND INSTRUCTIONS

### LOAN PROGRAM

Financing for work under this contract is provided through the City of Milwaukee, Neighborhood Improvement Development Corporation (NIDC) who, through its loan agreement with the Owner, reserves certain rights and privileges as Lender, which include but are not limited to: development of the scope of work, assistance with the bid process, preparation of the Contract, approval of change orders and payments, and other aspects associated with contract execution and implementation.

### SITE INSPECTION

The Contractor must meet with the Owner at the property to inspect and review conditions prior to submission of a bid.

### ADDENDA

If NIDC or the Owner determines the necessity for additional information and/or clarification(s), an Addendum will be posted on the internet at

<http://city.milwaukee.gov/NeighborhoodImprovement/NIDCBIDPackages.htm>

Any addendum will be posted at least one week before bids are due.

To be eligible, all bidders must acknowledge receipt of the Addendum/Addenda, if issued.

### BIDDER ELIGIBILITY

1. Contractor must have experience with similar projects and hold a current City of Milwaukee Home Improvement contractor's license, or hold other licensing as required.
2. Contractor certifies that neither he/she nor any of his/her subcontractors is ineligible to be awarded a federally funded contract.
3. Contractor may not be debarred by NIDC. A copy of the NIDC debarment policy is available on request. Generally, NIDC considers debarment if a contractor does not perform satisfactory work, fails to pay sub-contractors or material suppliers, fails to complete jobs on time, or in other respects does not meet reasonable standards of performance.
4. Contractors are hereby notified that NIDC will check public records to verify that it, and entities controlled in whole or in part by it and its principal owners is not delinquent with property tax payments due the City of Milwaukee, does not have outstanding code orders for properties located in the City of Milwaukee, does not have a record of fines for unabated City of Milwaukee building code violations, and does not have felony convictions related to neighborhood safety and stability.
5. Contractor shall, as part of her/his bid, submit:
  - a) A list of the principal owners of the firm submitting the bid,
  - b) A list of all property located in the City of Milwaukee owned by Contractor and its principal owners.
  - c) Birth date and other information as requested by NIDC to verify court and other records.
  - d) Failure to provide this information will result in delays and may be cause for rejection of your bid.

### BID REJECTION/ACCEPTANCE

1. The Owner reserves the right to reject any and all bids and to waive informalities. It is NIDC policy that, if: (a) the Contractor's proposal/bid complies with the specifications and other requirements, and (b) the Contractor meets NIDC's minimum requirements as outlined herein, and (c) the selected bid is reasonably within range of the market price for the work, then Owner may select any Contractor who, in Owner's opinion, is the most responsible and responsive bidder.
2. When a contractor's bid is accepted, he/she shall receive the following documents for execution.
  - A. Contract to Perform Rehabilitation Work
  - B. Subcontractor Schedule
  - C. Standard Contractor Invoice Documents

## **CONTRACT CONDITIONS**

On written request, NIDC will provide contractors a blank template of the Contract language, which includes provisions for liquidated damages, contract cancellation, and other terms and conditions.

## **PERMITS**

The contractor shall obtain and pay for all permits required to complete the contract. No work shall commence until permits have been obtained. These permits and licenses must be kept current and in force during the term of the contract and warranty period. A lead abatement permit must be obtained from the Milwaukee Health Department, and MHD will monitor the work. Contractors and employees must be eligible to obtain lead abatement permits and perform lead abatement work.

## **PAYMENT SCHEDULE**

The selected contractor shall submit a requested schedule of payments and schedule of values that will apply to work completed for this project. Generally payments are made available in amounts no less than \$5,000.

RETAINAGE: At Owner's and/or NIDC's discretion, 10% of the requested amount may be withheld pending punch list work including lead clearance from the Milwaukee Health Department. Contractors are also placed on notice that, for Rental Rehabilitation projects, the last \$1,000 of NIDC loan dollars are held pending the property owner's submission to NIDC of acceptable tenant certifications.

## **SPECIFICATIONS**

The City of Milwaukee "Rehabilitation Technical Specifications and Performance Standard" are incorporated herein by reference. Copies of this document are available at: <http://www.city.milwaukee.gov/RehabilitationTechni16398.htm>. If there is a conflict between the Specifications and the Scope of Work, the Scope of Work shall take precedence.

## **WITHDRAWAL OF BIDS**

Bids may be withdrawn only in total, and only by a written request prior to the award of the contract. Owner has sole discretion to grant a request for a bid withdrawal, and only in the case of an error that will result in a significant financial hardship.

## **NONDISCRIMINATION**

The successful bidder will not discriminate against any qualified employee or qualified applicant for employment because of sex, race, religion, color, national origin or ancestry, age, disability, lawful source of income, marital status, sexual orientation, gender identity or expression, past or present membership in the military service, familial status, or based upon affiliation with, or perceived affiliation with any of these categories as provided by Section 109-1 (3) of the Milwaukee Code of Ordinances. This provision must be included in all subcontracts. Contractor agrees that they will comply with all applicable requirements of the Americans with Disabilities Act of 1990, 42 U.S.C. 12101, et seq

## **INTEREST IN CONTRACT**

No officer, employee or agent of the City of Milwaukee who exercises any functions or responsibilities in connection with the review, approval or administration of this contract shall have any personal interest, direct or indirect, in this contract.

## **EMERGING BUSINESS ENTERPRISES (EBE) AND SECTION 3 WORK FORCE PARTICIPATION**

Contractors are notified that it is NIDC policy to strongly encourage EBE and Section 3 participation on all NIDC-sponsored contracts. Information about the City of Milwaukee's EBE programs is available at <http://www.city.milwaukee.gov/EmergingBusinessEnte1389.htm>.

**CITY OF MILWAUKEE – NEIGHBORHOOD IMPROVEMENT DEVELOPMENT CORPORATION (NIDC)**  
**CONTRACTOR RESPONSIBILITIES UNDER SECTION 3**

**What is Section 3?**

Section 3 is enforced by the U.S. Department of Housing and Urban Development (HUD.) Section 3 seeks to ensure that low income residents of the local community have access to the employment and contracting opportunities created by HUD funded programs. NIDC supports and encourages HUD's Section 3 goals.

**What projects are subject to Section 3?**

If you are a contractor who receives an NIDC contract for more than \$100,000, your project is subject to Section 3 requirements and you have certain responsibilities to comply with Section 3. Whether or not your bid on this project is over \$100,000, NIDC requests that you and your subcontractors fill out a "Section 3 Business Certification Form."

**What are Contractors' responsibilities under Section 3?**

If you are a contractor who, in a single contract, receives more than \$100,000 of Federal funding through NIDC, the following requirements apply to your project and will be included in the contract (See attached "Section 3 Clause" for language which will be included in contracts):

- Include the "Section 3 Clause" (see attached) in all contracts with your subcontractors on this project.
- Submit a "Section 3 Business Certification Form" and require all subcontractors working on a NIDC funded project to submit a "Section 3 Business Certification Form."
- Strive to meet the Section 3 Business participation goal of at least 10% of the total dollar amounts of construction contracts or subcontracts associated with this contract are awarded to Section 3 Businesses (the definition of a Section 3 Business is below).
- If this contract results in you or your contractors/subcontractors hiring **new employees**, you and your contractors/ subcontractors must attempt to identify and hire qualified Section 3 residents (the definition of a Section 3 resident is below) to fill these positions. "Attempt" means efforts such as recruiting low-income residents through local advertising media, displaying signs at the project site, contacting area community and workforce development organizations, or similar methods. If new employment opportunities are created as a result of this project, NIDC will require documentation of the steps you and your contractors/subcontractors took to identify and hire qualified Section 3 residents.
- Submit a Section 3 Participation Report at the conclusion of each project.

**What is a Section 3 Business?**

Section 3 Businesses are one of the following:

1. Businesses that are 51% or more owned by Section 3 Residents.
2. Businesses where at least 30% of employees are currently Section 3 Residents, or were within three years of the date of hire.
3. Businesses that commit to and document that at least 25% of the dollar amount of all subcontracts associated with its work on a project will be carried out by businesses which meet one of the two above criteria.

**Who is a Section 3 Resident?**

Section 3 Residents are:

1. Residents of Public Housing or
2. Individuals that reside in the City of Milwaukee and whose household incomes do not exceed the thresholds below.

(Income levels effective February 5th, 2014)

Family Size:	1 Person	2 Persons	3 Persons	4 Persons	5 Persons	6 Persons	7 Persons	8 Persons
Household Income	\$39,400	\$44,950	\$50,650	\$56,250	\$60,750	\$65,250	\$69,750	\$74,250

**Is there a current list of Section 3 Businesses?**

There is no current list of Section 3 Businesses in the Milwaukee Area. Currently, NIDC relies on businesses self-certification to determine whether or not a business is a Section 3 Business. While the criteria are not identical, many City of Milwaukee certified Emerging Businesses Enterprises (EBEs) may also qualify as Section 3 Businesses. A list of EBEs is available at: <http://www.city.milwaukee.gov/EmergingBusinessEnte1389.htm>

If you or your sub-contractors are seeking a referral source for qualified Section 3 Residents to be considered for new employment opportunities arising out of NIDC funded projects, please contact the Wisconsin Regional Training Partnership at 414-342-9787 or the Milwaukee Area Workforce Investment Board at 414-270-1700.

If you have additional questions about Section 3 requirements, please contact NIDC.

## City of Milwaukee – Neighborhood Improvement Development Corporation Section 3 Business Certification

**Section 3 Business Criteria:** Your business is eligible for Section 3 Certification if it meets any one of the following criteria. If your business meets one or more of these criteria, please circle the applicable criteria.

1. Fifty-one percent or more of your business is owned and managed by a Section 3 qualified person or persons. (See qualification guidelines below)
2. Thirty percent or more of your permanent, full-time employees are Section 3 qualified persons.
3. You can provide evidence of a commitment to subcontract in excess of 25 percent of the dollar award of all subcontracts to be awarded to business concerns that meet the qualifications of (1) and (2) above.

**Section 3 Person Criteria:** A Section 3 qualified person must:

- 1) Be a resident of Public or Indian Housing; or,
- 2) Live in the City of Milwaukee and, earn no more than the following amounts:

(Income levels effective February 5th, 2014)

Family Size:	1	2	3	4	5	6	7	8
	Person	Persons						
Household Income	\$39,400	\$44,950	\$50,650	\$56,250	\$60,750	\$65,250	\$69,750	\$74,250

**Section 3 Statement:** Please check the appropriate box below.

- My business is a Section 3 business in accordance with the criteria circled above under Section 3 Business Criteria.
- My business is not a Section 3 business.

Signature:		Date Signed:
Name:	Title:	
Company Name:		
Address:		
Telephone Number:		

**Note:** The City of Milwaukee or NIDC may request documentation and additional information as may be reasonably required to certify whether your business qualifies as a Section 3 business. If you are found to have intentionally falsified any information on this report, you may be prohibited from bidding on future City of Milwaukee or NIDC projects.

If you have any questions about this form, please call NIDC at (414) 286-5608.

### SECTION 3 CLAUSE

(for inclusion in all section 3-covered contracts)

- A. The work to be performed under this contract is subject to the requirements of section 3 of the Housing and Urban Development Act of 1968, as amended, 12 U.S.C. 1701u (section 3). The purpose of section 3 is to ensure that employment and other economic opportunities generated by HUD assistance or HUD-assisted projects covered by section 3, shall, to the greatest extent feasible, be directed to low-and very low-income persons, particularly persons who are recipients of HUD assistance for housing.
- B. The parties to this contract agree to comply with HUD's regulations in 24 CFR part 135, which implement section 3. As evidenced by their execution of this contract, the parties to this contract certify that they are under no contractual or other impediment that would prevent them from complying with the part 135 regulations.
- C. The contractor agrees to send to each labor organization or representative of workers with which the contractor has a collective bargaining agreement or other understanding, if any, a notice advising the labor organization or workers' representative of the contractor's commitments under this section 3 clause, and will post copies of the notice in conspicuous places at the work site where both employees and applicants for training and employment positions can see the notice. The notice shall describe the section 3 preference, shall set forth minimum number and job titles subject to hire, availability of apprenticeship and training positions, the qualifications for each; and the name and location of the person(s) taking applications for each of the positions; and the anticipated date the work shall begin.
- D. The contractor agrees to include this section 3 clause in every subcontract subject to compliance with regulations in 24 CFR part 135, and agrees to take appropriate action, as provided in an applicable provision of the subcontract or in this section 3 clause, upon a finding that the subcontractor is in violation of the regulations in 24 CFR part 135. The contractor will not subcontract with any subcontractor where the contractor has notice or knowledge that the subcontractor has been found in violation of the regulations in 24 CFR part 135.
- E. The contractor will certify that any vacant employment positions, including training positions, that are filled (1) after the contractor is selected but before the contract is executed, and (2) with persons other than those to whom the regulations of 24 CFR part 135 require employment opportunities to be directed, were not filled to circumvent the contractor's obligations under 24 CFR part 135.
- F. Non compliance with HUD's regulations in 24 CFR part 135 may result in sanctions, termination of this contract for default, and debarment or suspension from future HUD assisted contracts.
- G. With respect to work performed in connection with section 3 covered Indian housing assistance, section 7(b) of the Indian Self-Determination and Education Assistance Act (25 U.S.C. 450e) also applies to the work to be performed under this contract. Section 7(b) requires that to the greatest extent feasible (i) preference and opportunities for training and employment shall be given to Indians, and (ii) preference in the award of contracts and subcontracts shall be given to Indian organizations and Indian-owned Economic Enterprises. Parties to this contract that are subject to the provisions of section 3 and section 7(b) agree to comply with section 3 to the maximum extent feasible, but not in derogation of compliance with section 7(b).

# Bid Submission Form

This bid document consists of five (5) pages. They are the Bid Submission Form, the Materials List, the Contractor's References, Contractor Ownership Information, and the Subcontractor List.

All pages must be completed and submitted as your bid. Bid forms must be received no later than 10/10/2014. CONTRACTOR agrees this bid shall remain in effect for a period of sixty (60) days. If the OWNER takes no action during the 60 days, the bid shall become void without recourse by either party.

## START AND COMPLETION OF WORK

The work presented in this project is to be started within \_\_\_\_\_ days after Contractor's receipt of a Notice to Proceed and is to be satisfactorily completed within \_\_\_\_\_ days thereafter. Interior/Exterior Completion and/or Weather-Affected repairs, if any, must be completed as further outlined and incorporated in Bid Attachments A and/or B respectively. (Strike if not applicable.)

## BIDDING

Contractors should submit bids to do EXACTLY the work AS DESCRIBED. Any desired changes must be proposed on a separate, "Alternate Bid" page. Any proposed changes are subject to the owner's approval, after consultation with the lender.

## MAIL OR DELIVER BIDS TO THE OWNER AT CURRENT ADDRESS

Owner: Kim Hollins  
Project Address: 2201-2203 N 16TH ST  
Current Address: 2201 N 16TH ST  
Phone: (414) 372-9917

The contractor accepts and agrees to all of the terms and conditions stated in the General Bid Conditions and instructions which are incorporated herein by reference. The contractor hereby further agrees to execute a contract for performance of work as outlined in the "Scope of Work" dated 9/3/14 and to furnish labor and materials in accordance with the "Technical Specifications and addenda

for the lump sum BASE BID price of: \$ \_\_\_\_\_.

Company name \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_

City License # \_\_\_\_\_

Lead License No \_\_\_\_\_

Contractor Insurance \_\_\_\_\_

Expiration. Date \_\_\_\_\_

By: \_\_\_\_\_  
Signature

Date: \_\_\_\_\_

Title \_\_\_\_\_

Witness \_\_\_\_\_

Federal contractor tax id #or social sec # \_\_\_\_\_

Note: one of these numbers is required to validate this bid.

## **If other than sole proprietor, complete the following:**

I certify that I am the \_\_\_\_\_ (Officer or Title) of the corporation named as contractor herein; that \_\_\_\_\_ (Name of bidder) who signed this bid form on behalf of the contractor was the authorized representative, of said corporation; that said bid form was duly signed for and in behalf of said corporation by authority of its governing body, and is within the scope of its corporate powers.

(Corporate Seal) BY: \_\_\_\_\_

Acceptance By Contractor

I have reviewed all bids and hereby accept this bid. I understand that this acceptance is final and may not be revoked subsequent to approval by the NIDC Administrative Review Committee.

Owner's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Owner's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# Materials List

For the project located at: **2201-2203 N 16TH ST**

I, the contractor, submit the following descriptions and allowances as part of the bid price. Deviations from the materials, quantities or costs as herein specified will result in a change order with cost differences to the contract. The owner will be provided samples for selection in the price ranges or quality levels as shown below.

**SIDING:** Manufacturer \_\_\_\_\_ Gauge \_\_\_\_\_ Style \_\_\_\_\_  
Type of Material \_\_\_\_\_ Exposure \_\_\_\_\_ Color \_\_\_\_\_  
Type of Backerboard \_\_\_\_\_ Warranty Period \_\_\_\_\_

**ALUMINUM TRIM:** Color \_\_\_\_\_ Gauge \_\_\_\_\_

**STORM WINDOWS:** Manufacturer \_\_\_\_\_ Model \_\_\_\_\_  
Finish \_\_\_\_\_ Quantity \_\_\_\_\_

**STORM DOORS:** Manufacturer \_\_\_\_\_ Model \_\_\_\_\_  
Finish \_\_\_\_\_ Quantity \_\_\_\_\_

**KITCHEN CABINETS:** Linear Feet of Base Cabinets & Countertops: \_\_\_\_\_  
Linear Feet of Wall Cabinets: \_\_\_\_\_  
Manufacturer \_\_\_\_\_ Model \_\_\_\_\_  
Finish \_\_\_\_\_ Quantity \_\_\_\_\_

**MEDICINE CABINET:** Manufacturer \_\_\_\_\_ Model \_\_\_\_\_  
(Circle One) Lighting: with / without Mounting: Surface Flush

**FLOOR COVERING:** Allowance per square yard for flooring, material only: \_\_\_\_\_  
Allowance per square yard for carpet & pad, material only: \_\_\_\_\_

**VANITY:** Cabinet Manufacturer \_\_\_\_\_ Model \_\_\_\_\_ Size \_\_\_\_\_  
Sink Manufacturer \_\_\_\_\_ Model \_\_\_\_\_ Color \_\_\_\_\_  
Material \_\_\_\_\_  
Faucet Manufacturer \_\_\_\_\_ Model \_\_\_\_\_

**BATHTUB:** Tub Manufacturer \_\_\_\_\_ Model \_\_\_\_\_  
Color \_\_\_\_\_ Size \_\_\_\_\_  
Material \_\_\_\_\_  
Faucet Manufacturer \_\_\_\_\_ Model \_\_\_\_\_  
Showerhead Manufacturer \_\_\_\_\_ Model \_\_\_\_\_

**TOILET:** Manufacturer \_\_\_\_\_ Model \_\_\_\_\_ Color \_\_\_\_\_

**KITCHEN SINK:** Manufacturer \_\_\_\_\_ Basin (Circle One) 1 2  
Material \_\_\_\_\_ Size \_\_\_\_\_ Spray (Circle One) yes no  
Faucet Manufacturer \_\_\_\_\_ Model \_\_\_\_\_

**LAUNDRY TUB:** Material \_\_\_\_\_ Basin (Circle One) 1 2

**WATER HEATER:** Manufacturer \_\_\_\_\_ Model \_\_\_\_\_ Size \_\_\_\_\_ gallon  
Fuel: (Circle One) Gas Electrical

**HEATING:** Furnace Manufacturer \_\_\_\_\_ Model \_\_\_\_\_  
BTUH Input Capacity \_\_\_\_\_ Fuel \_\_\_\_\_

**HUMIDIFIER:** Manufacturer \_\_\_\_\_ Model \_\_\_\_\_

**ELECTRICAL:** Total material allowance for all light fixtures included in bid: \$ \_\_\_\_\_  
Total number of fixtures: \_\_\_\_\_

# Contractor Reference Form

(for project at: 2201-2203 N 16TH ST)

CONTRACTOR: List below three references.

Refer only jobs you have successfully completed and jobs of comparable size and scope to this job. The customer for whom you are submitting this bid may be contacting your references. Be sure to obtain permission from the owners whose names you provide.

## REFERENCES

1. Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_

SIZE OF JOB:  
\_\_\_\_\_ under \$10,000 \_\_\_\_\_ over \$10,000

BRIEFLY DESCRIBE THE WORK YOU COMPLETED:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_

SIZE OF JOB:  
\_\_\_\_\_ under \$10,000 \_\_\_\_\_ over \$10,000

BRIEFLY DESCRIBE THE WORK YOU COMPLETED:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_

SIZE OF JOB:  
\_\_\_\_\_ under \$10,000 \_\_\_\_\_ over \$10,000

BRIEFLY DESCRIBE THE WORK YOU COMPLETED:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Contractor Ownership Information

Thank you for submitting a bid for a NIDC-sponsored rehabilitation. If you have not been awarded a contract through NIDC in the past 12 months, you must complete this form.

I (we) certify that this information is true, accurate, and complete. I (we) understand that incomplete or inaccurate information may mean my (our) bid will not be accepted by NIDC.

**Failure to complete the form may disqualify your bid. Please print clearly.**

Full, legal name of your contracting business (no abbreviations):

\_\_\_\_\_

Address of business: \_\_\_\_\_

List all owners & partners of this business:

First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_

First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_

List addresses of all properties located in the City of Milwaukee that are owned in whole, or in part, by any owner or partner of the contracting business. Include properties under all forms of ownership including LLC's, incorporated businesses, partnerships, etc.

- |                  |                         |  |
|------------------|-------------------------|--|
| 1. Address _____ | Property taxes current? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                  | Open code orders?       | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 2. Address _____ | Property taxes current? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                  | Open code orders?       | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 3. Address _____ | Property taxes current? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                  | Open code orders?       | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 4. Address _____ | Property taxes current? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                  | Open code orders?       | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 5. Address _____ | Property taxes current? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                  | Open code orders?       | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 6. Address _____ | Property taxes current? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                  | Open code orders?       | Yes <input type="checkbox"/> No <input type="checkbox"/> |

Attach additional sheets if necessary.

## Sub-Contractor List

I (we) certify that this information is true, accurate, and complete. I (we) understand that incomplete or inaccurate information may mean my (our) bid will not be accepted by NIDC. Attach additional sheets for other sub-contractors or material suppliers.

The total of EBE sub-contracts, including material suppliers is: \$ \_\_\_\_\_

The total of Section 3 sub-contracts including material suppliers is: \$ \_\_\_\_\_

<b>ELECTRICAL</b>		Amount of Subcontract	\$
Company Name		EBE Status	Yes
Address			No
Contact Name		Section 3 Status	Yes
Contact Phone			No
<b>PLUMBING</b>		Amount of Subcontract	\$
Company Name		EBE Status	Yes
Address			No
Contact Name		Section 3 Status	Yes
Contact Phone			No
<b>HVAC</b>		Amount of Subcontract	\$
Company Name		EBE Status	Yes
Address			No
Contact Name		Section 3 Status	Yes
Contact Phone			No
<b>CARPENTRY</b>		Amount of Subcontract	\$
Company Name		EBE Status	Yes
Address			No
Contact Name		Section 3 Status	Yes
Contact Phone			No
<b>CONCRETE &amp; MASONRY</b>		Amount of Subcontract	\$
Company Name		EBE Status	Yes
Address			No
Contact Name		Section 3 Status	Yes
Contact Phone			No
<b>LEAD ABATEMENT</b>		Amount of Subcontract	\$
Company Name		EBE Status	Yes
Address			No
Contact Name		Section 3 Status	Yes
Contact Phone			No
<b>INSULATION</b>		Amount of Subcontract	\$
Company Name		EBE Status	Yes
Address			No
Contact Name		Section 3 Status	Yes
Contact Phone			No

# NSP COMPLETION REPORT

## 1. ACTIVITY INFORMATION

ACTIVITY #: NS1200300280 & NS1200400050	SUBMISSION DATE:
<input checked="" type="checkbox"/> Original Submission	<input type="checkbox"/> Revision
AGENCY NAME: Department of City Development	

## 2. ACTIVITY STREET ADDRESS

Client Name: Vanessa Britton			
Street Address:	2439-2441 N 4TH ST		
City:	Milwaukee	Zip code:	53212-2701
11-digit Census Tract #:	55079-010400	County Name:	Milwaukee

Initial Purchase Price: \$7,500	Appraised Value: \$20,000	Minimum of 1% Discount: <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO
Resale Price: \$	Type of Title:	<input checked="" type="checkbox"/> Fee Simple <input type="checkbox"/> Leasehold
# of Units PRE Rehab: 2	# of Units POST Rehab: 2	
Relocation Costs	\$	Program Income Returned to Agency with this Activity: \$200.00

## 3. NSP CONTRACT FUNDS ( Actual funds expended on project)

Set Up \$31,099.00	Total Expended \$31,099.00	Balance returned \$0.00
Amount: \$ 750.00	Amount: \$ 750.00	to Unallocated Amount: \$0.00

## ACQUISITION/REHAB (including Homebuyer Assistance), DEMOLITION, LANDBANKING, REDEVELOPMENT

Rehab Funds	<input type="checkbox"/> Deed restriction? (Affordability Period)	# of years 10	1. \$25,980.00
Direct Homebuyer Assistance	<input type="checkbox"/> 2 <sup>nd</sup> mortgage?	# of years 10	2.
Direct Delivery Costs: \$1,099.00	Home Buyer Counseling: \$750.00		3. \$1,849.00
<b>TOTAL NSP CONTRACT FUNDS</b> (1. + 2. +3. = 4.)			<b>4. \$27,829.00</b>

## 4. OTHER FUNDS (Specify source & use) N/A

Federal Funds ( HOME/ Housing Trust Funds)	
State/Local Appropriated Funds	\$
State/Tax Exempt Bond Proceeds/ Tax Credits	\$
<b>TOTAL OTHER FUNDS</b>	<b>\$</b>

## 5. PRIVATE FUNDS N/A

Lender Name: cash purchase	Mortgage Amount:
Loan Type: ___fixed ___variable	Lock In Date:
Interest Rate:	No. of Years:
Private Loan Amount	\$
Owner Cash Contribution	\$3,645
Foundation Grants	
Individual Donations (specify who/what)	\$
<b>TOTAL PRIVATE FUNDS</b>	<b>\$3,645</b>

# NSP COMPLETION REPORT

## 6. NSP PROGRAM INCOME N/A

TOTAL Program Income Used on this Activity	\$4,020.00
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TOTAL ACTIVITY COSTS (Total of Items 3 through 6)	\$
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10. What kind of HUD-approved homebuyer counseling did this household complete?

- Pre-purchase (8 hours)  
 Pre-purchase (8 hours) plus post-purchase  N/A

**Select Counseling Agency:**

- |                   |                          |                         |                                     |
|-------------------|--------------------------|-------------------------|-------------------------------------|
| ACTS CDC          | <input type="checkbox"/> | Select Milwaukee        | <input type="checkbox"/>            |
| All City          | <input type="checkbox"/> | United Community Center | <input type="checkbox"/>            |
| CYD               | <input type="checkbox"/> | Other <u>ACTS/CDC</u>   | <input checked="" type="checkbox"/> |
| Housing Resources | <input type="checkbox"/> |                         |                                     |

11. Number of households with a member with a disability? \_\_\_\_\_ (include unit #)  N/A

12. a. Did this activity involve interim controls (lead-safe work with "certified renovator" contractors) or abatement of lead-based paint?

- Yes  No

b. Did this activity involve "certified asbestos abatement" contractors?

- Yes  No

13. Did this activity meet Energy Star Standards?

- Yes  No

(If "Yes" please provide documentation showing certification from Focus on Energy)

14. Did this homebuyer come from subsidized housing (public housing or rental assistance from a federal, state or local program) immediately prior to NSP assistance?

- Yes  No  N/A

15. Did you contract with any MBE/WBE contractors/subcontractors for this activity?

- Yes  No

(If "Yes" please attach the MBE/WBE reporting form)

16. Did Project's Environmental Review have rehab condition requirements?  Yes  No

(If "Yes" supportive documents must be included in completion package)

<b>SCOPE OF WORK (Lind Rehab)</b>			
Kim Hollins (414) 372-9917			
2201-03 N. 16th Street 53205-1217		<i>Rehab Specialist:</i>	
		Jeff Keen 286-8604	
		<i>Loan Officer:</i>	
Scope date: 9/3/14		Ben Sanchez 286-5719	
Revised dates:			
Both the "Rehabilitation and Technical Specifications and Performance Standard for the City of Milwaukee - February, 2006" and the "NIDC Addendum to Specifications," dated 8/23/07 & 5/13/08, are incorporated into this scope by reference. These items provide an outline of materials requirements & performance expectations.			
Lead Related Work: Any task that a disturbs previously painted surface shall be performed by properly certified personnel and follow the State of Wisconsin Department of Health Services Administrative Code <b>Chapter DHS 163</b> regarding the certification for the identification, removal and reduction of lead-based paint hazards (Pb).			
And, if applicable: <input type="radio"/> YES <input checked="" type="radio"/> NO			
Any task that disturbs a previously painted surface requires Milwaukee Health Department notification (Pb-N). Window replacement shall be performed by properly certified personnel and requires a Milwaukee Health Department Permit (Pb-A).			
Miscellaneous: The contractor is responsible to field verify all measurements, the amount of materials needed, and the number of windows in the building. If any item in this scope calls for a certain manufacturer, model number, or approved equivalent of a particular item, and that item is to be substituted, both NIDC and the owner must approve the substitution in writing as a part of the contract.			
1	<b>EXTERIOR</b>	<b>Code</b>	<b>Cost Est</b>
2	Tear off and replace south roof and ridge cap. Install new underlayment sheathing. Install Ice and Water shield along eaves and in valleys.	PR	
3	Replace front balcony rubber roof.	PR	
4	Replace front service step handrail. Paint or stain same.	PR	
5	Install south front service step handrail.	PR	
6	Replace front porch joists. Use treated lumber. Permit is required.	PR	
7	Replace front porch deck. Use composite decking selected by owner.	PR	
8	Replace front porch steps and handrail to code. Use treated stringers and composite treads and risers.	PR	
9	Install steps handrail for each end of the steps for the front porch. Use composite materials.	PR	
10	Install guardrail for north front porch. Guardrail to match existing.	PR	
11	Secure all guardrail sections for the front balcony. Repair as needed.	PR	
12	Replace missing south downspout.	PR	
13	Replace front upper unit entry door to match lower unit door. Paint same.	PR	
14	Replace south rear entry door. Paint same.	PR	
15	Install security storm doors for both front entry doors and south side rear entry door.	PR	
16	Secure front porch soffit cladding and front porch ceiling aluminum panels	PR	
17	Tuck-point all front porch brick.	PR	
18	Install ceiling light fixture for the front porch.	PR	
19			
20	<b>Common</b>		
21	Install CO detector units for 1st floor, 2nd floor and basement.            (Owner)	C	
22			
23			
24		<b>TOTAL EST</b>	
25			
26			
27	Prepared by:	Date:	
28			
29			
30	Owner Approval:	Date:	