#### LOCAL BENEFITS PLAN

## Heritage Square Senior Apartments, Pasadena, California

Revised: October 19, 2012

## 1. PRECONSTRUCTION/CONSTRUCTION PERIODS

- **A.** <u>Local Benefits Plan (LBP)</u> maximize employment, training and procurement opportunities for Pasadena individuals, families and businesses by achieving 20% requirements for local hiring, local subcontracting and procurement of building materials from local vendors.
  - Implement LBP BRIDGE will contract with Benchmark, an affiliate of Morley Builders, to serve as the general contractor for Heritage Square Senior Apartments. In this capacity, Benchmark will assist BRIDGE in achieving LBP goals and incorporating the goals into subcontractor contracts.
  - Utilize Existing Databases Benchmark will outreach to local qualified subcontractors and utilize City of Pasadena First Source and other available existing databases from local construction trade organizations. A Local Supplier Database will be created to ensure local procurement goal is met.
  - Linkage to Apprenticeship Training Programs/Workforce Sourcing Agencies Benchmark will develop strong linkages to existing workforce apprenticeship training
    programs and workforce sourcing agencies. Subcontractors will be required to contact local
    organizations to identify qualified workers including but not limited to:
    - Flintridge Pre-Apprenticeship Program
    - Pasadena City College Building Construction Program
    - Pasadena City College Electrical Program
    - City of Pasadena Foothill Employment & Training Connection
    - Alta/Pasa Community Improvement Center
    - Altadena Economic Development Board
    - Ideal Youth
    - City of Pasadena First Source Hiring
    - Union Station Sources
    - Foothill Vocational Opportunities
    - Women At Work
  - **Contractor Controlled Insurance Program** Benchmark will offer a contractor controlled insurance program to provide general liability insurance to qualified subcontractors.
  - **Subcontractor Workshops** Benchmark will collaborate with Masbuild to sponsor subcontractor workshops to discuss licensing, LBP goals, bonding and insurance, certified payroll, prevailing wage and reporting requirements.
  - Workforce Referrals Prior to start of construction of Heritage Square Senior Apartments, Benchmark will refer local construction workforce to subcontractors for potential

employment on other construction projects in the Los Angeles Basin where Benchmark is the general contractor.

- **B.** <u>LBP Oversight and Construction Management</u> hire local organization to provide LBP oversight and monitoring and construction management services.
  - LBP Oversight/Construction Manager BRIDGE will contract with Masbuild to provide LBP oversight and monitoring and to work with Benchmark on construction management activities.
  - Benchmark Collaboration Masbuild will provide Benchmark with contact lists of
    qualified local hires, local subcontractors and local building supply stores, and collaborate
    with Benchmark to sponsor several workshops for local subcontractors to discuss LBP goals,
    reporting, bonding and insurance requirements.
  - **LBP Monitoring Reports** Masbuild will develop monthly LBP progress reports on behalf of the development team for submission to the City of Pasadena Housing Department.
  - City of Pasadena Purchasing Division Monthly Reporting Masbuild will collaborate with Benchmark to create and submit monthly reports to the City of Pasadena Purchasing Division summarizing the following information:
    - Payrolls.
    - Payments to subcontractors.
    - Receipts of materials purchases.
  - Communications Plan Masbuild will assist BRIDGE in implementing a communications strategy targeted to local stakeholders that will include an interactive project website, a telephone hotline, and ongoing outreach to local groups on an as needed basis. The project website will:
    - Serve as communications link for local subcontractors, local hires and residents.
    - Provide links to related websites of other Pasadena organizations.
    - Utilize City of Pasadena Neighborhood Connections and other existing communications media.
  - Career Building Opportunities During the development process, Masbuild is committed
    to being a resource for the community and will facilitate career opportunities for youth and
    adult students via partnerships with local youth programs and the Pasadena Unified School
    District College Career Pathway Program. Other activities Masbuild will offer include site
    visits, job shadowing and exposure to design, construction and real estate development as
    professions.

## 2. LEASE-UP/MARKETING PERIODS

- **A.** <u>Marketing/Management Plan</u> provide opportunities for Pasadena based residents to live at Heritage Square Senior Apartments following the City of Pasadena's local preference and priority guidelines and federal fair housing requirements.
  - **Provide Property Management Services** BRIDGE will contract with The John Stewart Company ("JSCo") to provide third party property management services for Heritage Square Senior Apartments.
  - **Resident Selection Plan** The JSCo will develop a Resident Selection Plan for review/approval by the City of Pasadena Housing Department six months before construction completion.
    - The Resident Selection Plan will describe process for selecting residents.
    - Criteria for resident selection will include background credit and criminal checks.
  - Marketing Outreach Plan The JSCo will develop a Marketing Outreach Plan for review/approval by the City of Pasadena Housing Department six months before construction completion.
    - The Marketing Outreach Plan will emphasize outreach to Northwest Pasadena and Pasadena-based, faith based organizations to ensure local residents are aware of housing that will be available at Heritage Square Senior Apartments.
- **B.** <u>Local Hiring</u> There will be a number of opportunities for local businesses and residents to secure 3<sup>rd</sup> party contracts or employment at Heritage Square Senior Apartments.
  - Hiring Local Vendors The JSCo will explore hiring qualified local vendors to provide landscaping, pest control, painting, carpet and other related services provided the proposals are within the budgeted amounts in the operating budget.
  - Hiring Local Residents The JSCo will explore hiring qualified local residents for two
    onsite property management positions, which include Resident Manager and Maintenance
    Staff Person.

#### 3. OPERATIONS PERIOD

- **A.** <u>Support Services Plan</u> develop a support services plan that will enable Heritage Square senior residents to live independently as long as possible.
  - **Support Services Coordinator** BRIDGE will contract with Huntington Senior Care Network ("HSCN") to provide support services coordination at Heritage Square.
  - Onsite Staffing HSCN will place one Social Worker onsite for two four hour shifts per week. Telephone back up via HSCN Resource Center will be available Mondays through Fridays.

- Individualized Service Plans HSCN will develop individual supportive service plans for residents and focus on assessment, case management and linkage to existing service providers.
- Career Building Opportunities HSCN is committed to being a resource for the entire
  community and will provide career building opportunities for youth and college aged students
  via internships and partnership with the Pasadena Unified School District College Career
  Pathway Program to offer job shadowing, exposure to social work as a profession, and
  intergenerational experiences.
- **B.** MOU's with Service Providers BRIDGE plans to enter into Memorandum of Understanding ("MOU") Agreements with local support service providers to offer mental health, health services, home delivered meals, substance abuse treatment and attendant care services for Heritage Square residents.

# LOCAL BENEFITS PLAN - PERFORMANCE SCHEDULE

(Updated: October 19, 2012)

Item	Activity	Performance Milestone		
1. Preconstruction Period				
a.	Refer local construction workforce to other construction projects where Benchmark is the general contractor.	Ongoing.		
b.	Meet with Northwest Pasadena stakeholders on as needed basis.	Ongoing.		
c.	Go "live" with HeritageSquarePasadena.com website.	Completed, September 2012.		
d.	Provide links to local apprenticeship training programs and workforce sourcing agencies on project website.	Completed, September 2012.		
e.	Establish telephone hotline for Heritage Square Senior Apartments.	Completed, September 2012.		
f.	Host three subcontractor workshops to discuss insurance and bonding requirements.	January 2013 through Fall 2013.		
g.	Use existing City of Pasadena local supplier and subcontractor database during referral and outreach process.	Beginning Fall 2013 through 14 month construction period.		
h.	Sign City of Pasadena Local Hiring Agreement.	December 2013		
2. Construction Period				
a.	Begin construction (14 month construction period).	January 2014.		
b.	Benchmark to offer contractor controlled insurance program (general liability insurance) to qualified subcontractors.	January 2014.		
c.	MasBuild to assist BRIDGE in tracking certified payroll on LCP Tracker, a software program that will be provided by City of Pasadena.	Monthly during construction period.		
d.	MasBuild to assist BRIDGE to develop/complete monthly Local Benefits Plan monitoring reports.	Monthly during construction period.		
c.	MasBuild to assist BRIDGE to develop/complete monthly reports to City of Pasadena Purchasing Division summarizing payrolls, payments to subcontractors and receipts for purchase of local materials.	Monthly during construction period.		

Item	Activity	Performance Milestone	
d.	MasBuild to implement career building program in partnership with local youth programs and Pasadena Unified School District.	During construction period.	
3. Lease Up/Marketing Period			
a.	BRIDGE and The John Stewart Company to submit Marketing Outreach and Resident Selection Plans to City of Pasadena Housing Department for approval.	September 2014 (6 months before construction completion).	
b.	BRIDGE and The John Stewart Company to review applications submitted by local vendors interested in providing 3rd party maintenance services.	December 2014 (3 months before construction completion).	
c.	Review applications submitted by local residents interested in applying for two onsite property management positions (property manager and maintenance person).	December 2014 (3 months before construction completion).	
d.	Begin Marketing and Lease-up efforts.	December 2014 (3 months before construction completion).	
e.	Construction Completion.	March 2015.	
f.	Achieve Full Occupancy.	May 2015.	
4. Operations Period			
a.	BRIDGE and Huntington Senior Care Network to submit Support Services Plan to City of Pasadena Housing Department for approval.	September 2014 (6 months before construction completion).	
b.	Huntington Senior Care Network to develop individualized service plans for residents.	Ongoing after residents move into apartments.	
c.	BRIDGE to enter into MOUs with local service providers to offer mental health, health services, home delivered meals, substance abuse treatment and attendant care services for residents on as needed basis.	March 2015.	
d.	Huntington Senior Care Network to implement career building program for local youth via internships and partnership with Pasadena Unified School District.	May 2015 (3 months after construction completion).	