



# Wauwatosa, WI

## Financial Affairs Committee

### Meeting Agenda - Final

7725 W. North Avenue  
Wauwatosa, WI 53213

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Tuesday, March 28, 2023

7:30 PM

Committee Room #1 and Zoom:  
<https://servetosa.zoom.us/j/81144274572>,  
Meeting ID: 811 4427 4572

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#### Regular Meeting

#### HYBRID MEETING INFORMATION

Members of the public may observe and participate in the meeting in-person or via Zoom at the link above. To access the Zoom meeting via phone, call 1-312-626-6799 and enter the Meeting ID.

#### CALL TO ORDER

#### ROLL CALL

#### FINANCIAL AFFAIRS COMMITTEE ITEMS

1. Request by the Fire Department to approve an emergency ladder truck repair and a Level 3 fund transfer [23-980](#)
2. Authorization to enter into a contract with Houseal Lavigne to develop the City-wide comprehensive plan [23-981](#)
3. Consideration of approval of one-year support and licensing renewal agreement with Nutanix for hyperconverged technology to run the City's technology services in the amount of \$54,998.39 [23-982](#)
4. Consideration of request by Parks & Forestry Superintendent for a waiver of the request for proposal process and approval of a contract with JW Industries for the installation of a storage facility at Hart Park [23-983](#)
5. Consideration of approval of a consulting services contract with Graef for a water pumping station in the amount of \$476,888 [23-984](#)

#### ADJOURNMENT

#### NOTICE TO PERSONS WITH A DISABILITY

Persons with a disability who need assistance to participate in this meeting should call the City Clerk's office at (414) 479-8917 or send an email to [tclerk@wauwatosa.net](mailto:tclerk@wauwatosa.net), with as much advance notice as possible.



## Staff Report

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**File #:** 23-980

**Agenda Date:** 3/28/2023

**Agenda #:** 1.

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Request by the Fire Department to approve an emergency ladder truck repair and a Level 3 fund transfer

**Department:**

Fire Department

**A. Issue**

The fire department is requesting approval of an emergency ladder truck repair and a level 3 fund transfer. Due to the urgency of the repair, it was completed using emergency purchasing rules without obtaining three quotes.

**B. Background/Options**

In February, our 2014 Pierce ladder truck suffered a major engine failure which required the replacement of the engine itself. These repairs were beyond the scope of our mechanic, so the vehicle was towed to Interstate Power Systems, a local heavy truck repair facility. After discussion with Director Ruggini and finance staff, we approved the repairs utilizing emergency purchasing rules. These rules require approval by the common council as soon as possible. The final repair cost was \$46,820.70. The repair was initially funded from the fire department equipment repair account.

**C. Strategic Plan (Area of Focus)**

Infrastructure

**D. Fiscal Impact**

These costs will be absorbed utilizing currently budgeted operating funds. We are requesting a fund transfer from the Reserve for Contingencies fund to cover this expense.

**E. Recommendation**

Recommend approval of the emergency work and a level 3 fund transfer from the General Fund Reserve for Contingencies to 10220000-6206 in the amount of \$46,820.70. This would leave \$315,626 remaining in the reserve.





To: **Financial Affairs Committee**  
From: **Jalal Ali, Director of Information Services**  
Date: **3/2/2023**  
Subject: **Approval of one-year Support and Licensing Renewal Agreement with Nutanix for hyper-converged technology to run the City's technology services, in the amount of \$54,998.39**

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#### **A. Background/Rationale**

The City of Wauwatosa has used Nutanix hyper-converged infrastructure (HCI) as the technology to run over 120 virtual servers in the City's two data centers. These servers facilitate the operations of most of the City's services including Financial, Human Resources and payroll, 911 Dispatch, Police and Fire record management, email, file services, to name a few. The Nutanix infrastructure was installed in 2019 following an extensive research and RFP process to replace an aging unsupported platform.

Hyper-converged technology is an IT infrastructure solution that combines storage, computing, and networking into a single platform, making it easier and more efficient to manage. Hyper-convergence takes many of the, previously separate, components that make up a data center and consolidates them into a unified platform. This unification, or convergence, allows tighter integration of those parts thus providing for a single management interface to manage the three tiers. This reduces staff time required to maintain our systems up-to-date while also reducing costs and improving scalability. Hyper-convergence has allowed us to focus on our service offering and meeting resident's needs rather than constantly managing compatibility of multiple disparate resources.

In the 2019 RFP, the City evaluated responses from four vendors with solutions ranging from \$508,000 to \$962,000 for relatively comparable solutions. After further research and discussion, the City selected Heartland Business Solutions' proposal to





install Nutanix at a cost of \$413,000 which included 3 years of support and maintenance. The selection of Nutanix was based on their market performance as visionary leader in the field with strong ability to execute their vision, according to the, then current, 2019 Gartner report. It was anticipated at the time that renewals after year 3 would cost \$75,000. These costs include licensing fees to continue use of the Nutanix software. The renewal also provides 4-hour response to replacement of failing server components as well as support & updates to the software that activates these components.



Council approval is required since the renewal costs exceeds \$25,000. These costs are included in the 2023 Information Technology budget.

## B. Key Issues for Consideration

- Heartland Business Solutions (HBS) is the registered Value-Added Reseller (VAR) for Nutanix. As the registered, HBS receives exclusive renewal discounts from Nutanix that are not made available to other resellers. HBS is then able to extend those discounts to the City.
- Continued use of the Nutanix software requires renewal of software contracts





### **C. Fiscal Impact**

The March 26<sup>th</sup>, 2019 FAC memo listed the annual future financial impact to cover our servers, storage, and backup platform at \$75,000. Our current costs for this coverage are \$67,000 that also includes renewal of the backup software, Veeam.

This request is a one-year renewal of licensing, maintenance, and support of existing software and hardware. The City continues to qualify for large renewal discounts due to early adoption of Nutanix's solution.

### **D. Requested Action**

Approval of renewal agreement for one year at a cost of \$54,998.39

### **E. Attachments**

Renewal quote from Heartland Business Solutions





## Staff Report

**File #:** 23-981

**Agenda Date:** 3/28/2023

**Agenda #:** 2.

Authorization to enter into a contract with Houseal Lavigne to develop the City-wide comprehensive plan

**Department:**

Development

**A. Issue**

City-wide comprehensive plan contract authorization.

**B. Background**

In November 2022, we issued a Request for Proposals (RFP) for consultants to prepare a new comprehensive plan and received seven proposals in late January 2023. The bid list is attached. Following a criteria-based review of submitted proposals, Development staff conducted in-person interviews with four firms. While all interviewed firms are capable of performing the work, staff selected Houseal Lavigne for their nation-wide comprehensive planning experience and for the additional items they offered, as described below. Houseal Lavigne has worked with more than 400 communities across the country on planning efforts and has won numerous awards, including national and state level American Planning Association awards as well as from the Congress for New Urbanism, and from ESRI for their use of GIS.

The initial fee proposal in response to the RFP was \$199,710, within the budget of \$200,000, that includes the following scope of work to prepare the comprehensive plan:

- Data gathering and analysis including an orientation tour, department heads meeting, and review of various plan/studies/existing conditions.
- A Plan Commission and Common Council project initiation meeting.
- A public community-wide kick-off meeting.
- Regular meetings with staff and the Plan Commission/steering committee.
- Community education including project Branding and Collateral.
- Up to twelve key stakeholder interviews or focus groups.
- One business community workshop.
- Do it yourself kits for public engagement.
- A project website.
- An online public input survey and map-based engagement mapping tool.
- Two community visioning workshops.
- Up to four community open houses to review the draft plan document.
- Presenting the draft plan to the Plan Commission, Community Affairs Committee/Common Council.

In addition to the scope identified in the RFP, the proposal offered add-on items including:

- Two sub-area plans - proposed for the west side of the City with three catalytic site concepts per sub-area.
- An interactive executive plan summary with an ArcGIS StoryMap.
- A zoning code audit that will provide zoning update recommendations for consistency with the adopted plan.

The additional items increased the fee proposal to \$283,823, or an additional \$84,113. Staff recommends including these items as part of the contract due to the time and cost efficiencies it provides as opposed to undertaking separately at a later date.

### **C. Strategic Plan (Area of Focus)**

Priority 4: Housing; Goal 3. Update the Comprehensive Plan and the Zoning Code.

### **D. Fiscal Impact**

The price is \$283,823. Funding for the comprehensive plan in the amount of \$100,000 was included in the 2023 Planning Division budget (\$50,000) and Community Development Block Grant (CDBG) allocation (\$50,000). The same allocation will be requested for 2024. An additional \$50,000 of existing CDBG administration funds can be repurposed for the comprehensive plan, leaving a 2025 Planning Division budget request of \$33,823 to fund the plan with the proposed scope.

### **E. Recommendation**

Staff recommends authorization to enter into a contract with Houseal Lavigne to develop the City-wide comprehensive plan in the amount not to exceed \$283,823, including a Level Three fund transfer for the additional CDBG funds.

City of Wauwatosa - RFP - Comprehensive Plan  
Due Date: January 26, 2023 at 2:00 PM

### **Consultant List**

Douglas Finch	Strategist Leader	<a href="mailto:douglas@strategistleader.com">douglas@strategistleader.com</a>	\$134,500.00	
Cory Scott	RDG	<a href="mailto:cscott@rdgusa.com">cscott@rdgusa.com</a>	\$140,000.00	
Miranda Braatz	r3elevated	<a href="mailto:miranda@r3elevated.com">miranda@r3elevated.com</a>	\$187,000.00	
Amy Bennett	MSA Professional Svs	<a href="mailto:abennett@msa-ps.com">abennett@msa-ps.com</a>	\$187,000.00	
Meredith Perks	Vandewalle & Associates	<a href="mailto:mperks@vandewalle.com">mperks@vandewalle.com</a>	\$194,190.00	
Josh Koonce	Houseal Lavigne Assoc	<a href="mailto:jkoonce@hlplanning.com">jkoonce@hlplanning.com</a>	\$199,710.00	
Xu Zhang	Dover, Kohl & Partners	<a href="mailto:xzhang@dovertkohl.com">xzhang@dovertkohl.com</a>	\$200,000.00	
Laura Sheach	Coraggio Group	<a href="mailto:laura@coraggiogroup.com">laura@coraggiogroup.com</a>	<u>NO BID</u>	Rec'd no bid email on 12/14/22

### **NO RESPONSE**

?	Antero Group	<a href="mailto:info@anterogroup.com">info@anterogroup.com</a>	
?	Ayres Associates	<a href="mailto:ayrescontact@ayresassociates.com">ayrescontact@ayresassociates.com</a>	
Ashton Hoxworth	Bloom Companies	<a href="mailto:ahoxworth@bloomcos.com">ahoxworth@bloomcos.com</a>	
Michelle A Peterson	Engberg Anderson	<a href="mailto:michellep@engberganderson.com">michellep@engberganderson.com</a>	
tom stacey	EUA	<a href="mailto:toms@eua.com">toms@eua.com</a>	
Ursula Twombly	FAIA Member Emeritus	<a href="mailto:ursula.twombly@gmail.com">ursula.twombly@gmail.com</a>	
Candace Spears	Floor23digital	<a href="mailto:candace@floor23digital.com">candace@floor23digital.com</a>	
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Kim Jones	Prime Vendor	<a href="mailto:primevendor123@gmail.com">primevendor123@gmail.com</a>	
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Marty Shukert	RDG	<a href="mailto:mshukert@rdgusa.com">mshukert@rdgusa.com</a>	
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Fran Lefor Rood	SB Friedman	<a href="mailto:frrod@sbfriedman.com">frrod@sbfriedman.com</a>	
Ben McKay	SEWRPC	<a href="mailto:bmckay@sewrpc.org">bmckay@sewrpc.org</a>	
Gerard	Trees on the Move	<a href="mailto:gerard@treesonthemove.com">gerard@treesonthemove.com</a>	



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# MEMORANDUM

VIA EMAIL

TO: City of Wauwatosa  
Tammy Szudy, Planning and Zoning Manager

FROM: Houseal Lavigne Associates  
John Houseal, FAICP, Partner and Co-founder  
Josh Koonce, AICP, Project Manager

DATE: Monday, March 27, 2023

RE: City of Wauwatosa Comprehensive Plan  
Revised Scope and Fee Proposal

Houseal Lavigne is thrilled to soon be working with the City of Wauwatosa on its new Comprehensive Plan. In response to our follow-up scoping meeting, we have revised our scope of work and cost to reflect some additional tasks and changes. We have identified the scope changes below and provide a detailed scope of work on the following pages that reflect full integration of all changes.

Based on our meeting to identify the City's desired optional tasks, we have revised the preliminary scope and fee as follows:

Outreach: A community-wide outreach event is moved from Step 2 to Step 1 to provide more effective and dispersed engagement.

Subarea Plans: A new dedicated Step 6 has been added that includes two corridor subarea plans.

Interactive Online Executive Summary: Includes an ArcGIS StoryMap of the Comprehensive Plan Executive Summary.

Zoning Audit: A dedicated Zoning Audit in two steps is provided to ensure the City's zoning regulations can successfully implement the new comprehensive plan.

Our initial proposed project cost was \$199,710 and our revised not-to-exceed project cost is \$283,823, which includes the additional tasks and changes as discussed.

Our team is looking forward to the next steps and to working with the City of Wauwatosa on its new Comprehensive Plan.

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# Scope of Work

*Revised March 27, 2023*

## **Step 1: Project Initiation**

To “kick-off” the planning process on the right foot, meetings will be conducted with City staff, the Plan Commission (as part of the Steering Committee), and the City of Wauwatosa Common Council before undertaking other community outreach activities. This approach allows the Consultant Team and the various City designated individuals to discuss roles, responsibilities, scope, and community issues and opportunities, to ensure the project gets off to a good start.

### **Formation of a Comprehensive Plan Steering Committee**

We recommend that Wauwatosa establish a Comprehensive Plan Steering Committee, made up of members of the Plan Commission and Alderpersons from the Common Council. The Steering Committee should serve as a community sounding board, meeting at key points along the process to discuss issues and overall planning direction and provide feedback for consideration by the full adopting bodies. Participation by members of the Plan Commission and Council on the Steering Committee will help develop champions for the plan and ensure that the process moves smoothly. Meetings will be conducted with the Steering Committee at key intervals throughout the planning process.

#### **1a: Staff Coordination Call (web meeting)**

The Project Team will host a web meeting/conference call with staff to confirm dates and times for the official staff kickoff and department head meetings. On this call, we will also discuss data needs and clarify any outstanding matters including the formation of a Comprehensive Plan Steering Committee. To ensure consistent communication and coordination the Project Team manager will conduct regular and “as-needed” conference calls and/or web meetings with staff throughout the planning process.

#### **1b: Community Education – Branding and Collateral**

As part of project initiation, this task will play a significant role in garnering support for the planning process and piquing public interest in the Comprehensive Plan as important guides to improving the quality of life throughout Wauwatosa. The graphic design and communications experts on the Project Team will use their expertise in community-based marketing to create an “identity” for the planning process as well as the plan document. We will work with City staff to provide content for the project website and support for the City’s social media.

#### **1c: Data Collection**

As part of the project initiation task, the Project Team will coordinate with the City to collect a variety of datasets related to land use and development. The data collection task focuses on GIS data needs including, but not limited to parcels, building footprints, zoning districts and overlays, community facilities, parks, traffic volumes, sidewalk inventory, traffic signals, bike routes, and trails.

#### **1d: Staff Kick-off Meeting and Orientation Tour of the City**

We intend to function as a unified and integrated team alongside City staff and officials. A kick-off meeting will be held with the City staff assigned to the Comprehensive Plan project. This first face-to-face meeting will allow us to 1) review the project scope of work; 2) discuss project goals, timeline, and key deliverables; 3) share information about potential issues and areas of concern; 4) review administrative procedures; and 5) clarify any outstanding matters. This meeting will conclude with a staff-led tour of the community to better understand existing conditions and the context of Wauwatosa. During this meeting, we will also confirm upcoming meetings and events.

### **1e: Department Heads Meeting**

Immediately following the Staff Kick-off Meeting, the Project Team will host a meeting with key members of each of the City's departments. Comprehensive Plan recommendations will have bearing on a wide variety of City policies and support from all City departments will be essential to the implementation of the plan.

### **1f: Plan Commission, Common Council, and Steering Committee Project Initiation Meeting**

*Note: This meeting of the full Plan Commission and Common Council will also serve as the first steering committee meeting.*

The Project Team will facilitate an introductory roundtable discussion with the Plan Commission and Common Council at a meeting to solicit their concerns and aspirations for the community. As the community's decision-makers, the Common Council must have a chance to communicate and discuss their issues and concerns with the Project Team, as well as each other, at the beginning of the process.

The primary purpose of this work session is to gather ideas from City officials, ensuring that the plan accurately captures the shared sentiments of the leaders of the community. This work session will provide a unique opportunity to jointly discuss the foundation of the Comprehensive Plan process, the overall direction and policy issues facing the community, and begin the discussion of the future vision of the community. The meeting will include an exercise to identify Wauwatosa's top issues, concerns, assets, and priorities.

### **1g: Community Kickoff Meeting**

The Project Team will work with City staff to host a community-wide kickoff event. The public kickoff will educate and inspire participants to get involved and take ownership of the process and the future of the City. The format will include an overview of the planning process and an issues and opportunities exercise. Houseal Lavigne will work with City staff to identify a date and time to ensure maximum community participation. Feedback will be compiled into a summary report, which will be included in the Community Engagement Key Themes and Takeaways Summary as part of the Existing Conditions Memorandum.

*The Project Team will work with City staff to ensure that in-person meetings in Step 1 (1d-1g) are during one trip on consecutive days.*

## **Step 2: Community Engagement**

Anticipating high levels of participation from an active and engaged community, our proposed outreach processes for the Comprehensive Plan include both traditional (face-to-face) and web-based activities to obtain the broadest levels of participation possible. Outreach summaries will be prepared at the end of each event of our engagement effort. The summaries will be delivered to staff for review and posted to the project website. Outreach summaries will be compiled and incorporated into the Existing Conditions Memorandum/Presentation (task 3e). Community engagement efforts extend throughout the process, as identified in the preliminary

### **2a: Project Website**

At the onset of the project, we will design and host an interactive project website linked to the City's existing website. We are committed to using the internet to maximize the participation and communication between the City and its residents. An interactive project website provides a home base for information regarding the Comprehensive Plan. This website will be used to promote and popularize the planning process and be used to post project schedules and meeting dates; display graphics, interactive maps, and draft documents; address frequently asked questions; host map.social; and provide an online community questionnaire.

## **2b: Online Community Questionnaire (Survey for Public Input)**

To provide another means for community participation, we will prepare an online questionnaire for the residents and business owners of Wauwatosa to offer a community-wide opinion on a range of topics and issues. The business component of the questionnaire will include the opportunity to provide specific input on those issues and concerns most important to the City's business community. The online community questionnaire will be easily accessible on the project website. At the close of the questionnaire response period, we will review and summarize results as a gauge of community issues, key themes, and principles.

## **2c: map.social (Online Map-Based Engagement Platform)**

The project website will feature map.social, a web-based community issues mapping tool. Developed by Houseal Lavigne, this tool allows users to identify, map, and comment on geographic areas of concern and valued community amenities. map.social simplifies the mapping process and familiarizes users with all areas of the Wauwatosa community in a manner that is exciting, interactive, and effective. Input from users allows us to create a composite map of community issues to assist with the establishment of community goals and policies. The City can publicize the map.social link using email lists, social media, and postcards.

## **2d: Key Stakeholder Interviews/Focus Groups (up to 12)**

Key stakeholder interviews allow us to gain insight into the community that we might otherwise not be able to obtain. Up to 12 confidential interviews will be conducted to obtain additional information regarding local issues and potentials. The Project Team will work with staff and elected officials to identify those to be interviewed. We recommend a broad sampling of interviewees who may possess unique perspectives or special insights into the community. Interviewees could include selected property owners, new or lifelong residents, local business owners, school district officials, adjacent communities, citizen members from relevant City Boards and Commissions, and representatives from other government agencies, institutions, and/or civic groups. The interviews will be conducted in person during scheduled visits related to other outreach events or via telephone/virtual conference as needed.

## **2e: Do-It-Yourself (DIY) Workshop Kits**

To effectively engage residents at the local/neighborhood level, the Project Team will prepare Do-It-Yourself (DIY) workshop kits. DIY workshop kits will allow City staff, community groups, and residents to facilitate their own workshops and gather input from specific segments of the population that may not otherwise participate in more formal planning activities.

The Steering Committee and City staff will play a key role in helping distribute DIY workshop materials to target groups and providing summary information to the Project Team. DIY Workshops can either be conducted by staff or volunteers as in-person events or hosted online using a small group virtual event format such as Zoom or Microsoft Teams. *Houseal Lavigne will summarize the results of up to 10 DIY workshop kits.*

## **2f: Business Community Workshop (one event)**

This workshop will be targeted specifically to business owners and managers, developers, and Wauwatosa's corporate citizens as an important stakeholder group. The purpose of the workshop is to establish a dialogue and obtain feedback from those members of the business community that have a unique insight and perspective and whose assistance and involvement are crucial to the Plan's ultimate success. The workshop will be scheduled to coincide with other in-person engagement activities and can be conducted in the early morning to minimize impacts to business owners or scheduled as part of a regularly scheduled event where numerous property owners and business owners are typically in attendance.

## **2g: Community Visioning Workshop Series (two events)**

The purpose of a Community Visioning Workshop is to allow residents and stakeholders to tell the Project Team what they think before policies and recommendations are crafted. The Community Visioning Workshop series will involve the Project Team, elected officials, City staff, the Steering Committee, and members of the community.

Workshops will begin with a large group exercise where participants will work together to identify planning priorities, issues, and opportunities. Participants will then “break out” into small groups for a mapping exercise where they will put pen to paper and work to develop their “vision” for the future of the community. Each workshop will conclude with a general agreement regarding the community’s issues and opportunities, key planning themes and principles, the long-term role and character of Wauwatosa, and the projects and improvements that will be desirable in the future.

*To reach the most people, the two visioning workshops can be conducted in different locations in the City and at different times (daytime vs. evening). It is anticipated these meetings will be conducted during one trip on consecutive days, and that tasks 2f and 2g will be conducted during the same trip.*

## **2h: Community Engagement Key Themes and Takeaways Summary**

This task will conclude with a summary of the key themes and takeaways from all initial community outreach events. The summary will provide focus and direction for subsequent activities. The summary will be incorporated into the Existing Conditions Memorandum delivered as part of Step 3.

## **Step 3: Existing Conditions Analysis**

This step will include the preparation of an Existing Conditions Memorandum that will provide an inventory and summarize our analysis of existing conditions, document existing land uses, identify key thoroughfares and community facilities, and provide an economic and demographic profile. It will be based on issues and opportunities identified in outreach, past plans and studies, information provided by the City and partner agencies, feedback from community service providers, and reconnaissance conducted by the Project Team. We intend to move through this step efficiently, reserving the project budget and resources for visioning, planning, and action.

### **3a: Current and Past Plans, Studies, and Reports Summary**

We will review existing plans and policies, including:

- 2008-2030 Comprehensive Plan
- East Tosa North Avenue Plan
- The Village of Wauwatosa, A Strategic Redevelopment Plan
- Burleigh Triangle and Mayfair Road Corridor North Redevelopment Vision and Plan
- Redevelopment District No. 1 Project Plan
- Bike and Pedestrian Facilities Plan
- Midtown North Avenue Plan
- Wauwatosa Life Sciences District
- Active Tosa – Park and Recreation Plan

This review process will help determine 1) recently adopted City policies that need to be reflected in the Comprehensive Plan, 2) changes within the community that have occurred since the adoption of previous plans, 3) conflicts between or deficiencies within existing plans, and 4) the validity of previously collected data.

### **3b: Demographic Analysis and Economic Profile**

The project team will prepare a demographic analysis of the Wauwatosa community that will include a summary of population, households, income, age characteristics, racial and ethnic composition, and labor force and employment. This analysis will be summarized, and a profile will be formulated that will provide an overview of trends for residential, retail, office, and industrial land uses. We will use U.S. Census data as well as proprietary data sources for this analysis.

### **3c: Existing Conditions Analysis**

We will inventory existing land use, transportation, environmental features, and community facilities. This task will provide a foundational understanding of the community. The Existing Conditions analysis will include an evaluation of the following components, each presented in the Existing Conditions Memorandum with text and maps based on data provided by the City:

#### **Land Use and Development**

Field reconnaissance, aerial imagery assessment, and a review of the City's GIS data will be used to inventory land use in the City. An existing land use map that identifies all existing land uses within the City will be prepared.

#### **Zoning and Development Regulations**

A preliminary assessment of the City's current zoning code (Title 24), zoning map, and established development regulations will be conducted to identify alignment with existing land use and needed areas of improvement.

#### **Transportation and Mobility**

Existing transportation conditions, including vehicular, bike and pedestrian facilities, and transit will be assessed along with a review of existing transportation information from the City, Milwaukee County, Wisconsin Department of Transportation (WisDOT), and other sources as needed/relevant. An inventory will be compiled of planned and proposed improvement projects, and existing deficiencies and issues. An existing transportation map will be prepared as part of this task.

#### **Community Service Facilities and Infrastructure**

Public and semi-public facilities and services will be inventoried and assessed regarding location, capacity, and future needs. To support this inventory, a community facilities survey will be sent to the necessary facility and service providers in the community. An existing community facilities and infrastructure map will be prepared.

#### **Parks, Open Space, and Natural Features**

Recreational facilities, amenities, parks, and trails will be inventoried and assessed. This analysis will also inventory natural resource conservation areas and riparian areas. An existing parks and natural features map will be prepared.

### **3d: Existing Conditions Memorandum**

The Project Team will compile the results from community engagement activities and the existing conditions analysis into an Existing Conditions Memorandum. The memorandum will include existing conditions, issues, and opportunities that will be addressed in the new Comprehensive Plan. The Existing Conditions Memorandum/Presentation is an interim deliverable collecting and presenting data and information gathered in Steps 1 through 3 under a single memorandum to City staff and the Steering Committee.

### **3e: Staff Review (web meeting)**

City staff and the Project Team will review the Existing Conditions Memorandum ahead of its distribution to the Steering Committee. The review process may include two rounds of revisions. We

will also work to ensure that substantive comments provided by staff integrate into the ensuing Plan development. This meeting will be a conference call/screen share with City staff.

### **3f: Steering Committee Meeting - Existing Conditions Review and Redevelopment Site Identification**

The Project Team will meet with and present the Existing Conditions Memorandum to the Steering Committee to gather feedback and input. During this meeting, key redevelopment sites and potential areas for focused study will be identified. The preliminary list of sites will be evaluated with staff alongside the Steering Committee and refined to identify the sites for which catalyst site models will be developed as part of Task 6d.

## **Step 4: Vision, Goals, and Preliminary Land Use Element**

The Comprehensive Plan needs to establish an overall “vision statement” for the future of Wauwatosa that can provide focus and direction with goals based on analysis and themes identified during community outreach. The vision and goals, combined with a Preliminary Land Use Element to direct place-based recommendations, will serve as the “cornerstone” of the consensus-building process and provide focus and direction for subsequent planning activities.

### **4a: Vision Statement and Goals**

The Project Team will synthesize all feedback received during the previous tasks of the planning process and prepare a vision statement and goals for the City of Wauwatosa. The vision statement will be prepared based on feedback from the community visioning workshop, community outreach activities, and observations garnered from the existing conditions memorandum. Plan goals will also be developed to provide a more specific focus and direction for planning recommendations. As a starting point, we will assess and update goals from the 2008-2030 Comprehensive Plan. The Project Team will develop additional categories for goals that no longer apply or were not part of the previous plan.

### **4b: Preliminary Land Use Element**

Based on the outcome of the previous tasks, the Preliminary Land Use Element will include recommendations and policies for the next 20 years for all land use areas in the City including residential areas and neighborhoods, mixed use areas, commercial and industrial/production areas, open space, areas of the natural environment, and public and quasi-public uses.

The Preliminary Land Use Element will form the core of the Land Use Plan Element and will identify and address a range of land use topics such as desired development and redevelopment patterns, land use compatibility issues and mitigation strategies, commercial and mixed-use development, and open space conservation areas. This first core element will provide the overarching guidance to all other land use-related components of the Comprehensive Plan including housing and economic development elements developed in Step 5.

### **4c: Staff Review (web meeting)**

Staff and the Project Team will review the Vision, Goals, and Preliminary Land Use Element of its distribution to the Steering Committee. Comments provided by staff will be integrated into the Vision Statement and Goals and distributed to the Steering Committee for its review.

### **4d: Steering Committee Meeting**

The Project Team will meet with and present the Vision, Goals, and Preliminary Land Use Element to the Steering Committee to gather feedback and input.

## **Step 5: Preliminary Elements**

This step will entail the preparation of draft plan elements and recommendations.

### **5a: Preliminary Elements**

Collectively, the following elements will identify trends that should be considered in planning for the future and address issues identified by the community, City staff, and stakeholders. Although the elements will accommodate appropriate and desirable development and improvements, all elements will be respectful and supportive of the community's vision and goals developed in the previous task. Each element will be highly illustrative and graphically compelling. Maps, illustrations, and concept visualizations will be utilized to convey planning and development concepts and recommendations.

We understand that the final plan will include the elements as defined in Wisconsin Statutes Sec 66.100, whether individually or combined into larger elements. While the elements will be refined with staff at the outset of the process, based on our preliminary understanding of the community, the following will be prepared as part of Task 5a:

#### **Housing Element**

The Housing Element will consider location, types, age, and condition of housing; owner and renter occupancy; and affordability of housing. This element will identify the recommended location for different housing types to meet the current and future needs of Wauwatosa's residents. The element will include a discussion of anticipated impacts of demographic trends and regional growth based on the existing conditions analysis.

#### **Economic Development Element**

The Economic Development Element will provide additional detail and guidance regarding desired retail, office, and industrial development. It will also outline policies designed to strengthen employment, job creation, and to provide and grow a diverse and thriving tax base for the City, focusing on existing and planned commercial and industrial use areas, including key core areas such as the Village of Wauwatosa.

#### **Transportation Element**

The Transportation Element will focus on the coordination and optimization of all modes of travel within the City, including vehicular, bicycle, walking, and transit services. "Complete Streets" principles will be incorporated as appropriate throughout the framework, to ensure effective mobility environments for pedestrians, cyclists, motorists, and persons using public transit.

#### **Utilities, Infrastructure, and Community Service Facilities Element**

The Utilities, Infrastructure, and Infrastructure, and Community Service Facilities Element will identify and inventory all community facilities and service providers in the City and include recommendations and policies for municipal facilities and services and intergovernmental coordination and cooperation. This element will help plan for anticipated capital needs such as investments in water supply, treatment, and distribution; sewage system and wastewater treatment; and solid waste collection and disposal.

#### **Parks, Open Space, and Natural Resources Element**

The Parks, Open Space, and Natural Resources Element will identify linkages, environmental protection areas, open space, and unique and sensitive natural resources. This element will consider riparian corridors and other water resources, forested land, parks and recreation areas, wetlands, and other environmental features and ecological systems.

### **5b: Web Meetings Series (Two Virtual/Remote Meetings)**

The Project Team will conduct a series of two web meetings focusing on the Preliminary Elements listed above. Each web meeting will provide an opportunity for the Project Team, City staff, and the Steering Committee to discuss preliminary policies, plan recommendations, and initial maps and

graphics. Web meetings can be hosted by the Project Team and recorded for City staff and any Steering Committee members unable to attend.

The use of web meetings will increase the number of touchpoints between the Project Team, City staff, and the Steering Committee. This will provide for a more responsive and efficient workflow that minimizes the potential for issues and time-consuming revisions, maximizing Project Team resources spent on plan development. This process will also enable incremental review of draft plan content by City staff and the Steering Committee, rather than a wholesale review, which can be arduous and dilute the quality of input. This approach allows City staff and the Steering Committee to effectively monitor the progress of the work program at a manageable scale.

## **Step 6: Subarea Planning (Two Corridor Subareas)**

Recognizing certain areas of Wauwatosa are more susceptible to change or impacts from new development, more detailed planning efforts may be needed to better guide investment. In addition to citywide plan elements, policies, and recommendations, we will prepare detailed subarea plans within the Comprehensive Plan. We understand that there are two priority corridors within the City identified for subarea planning:

- *North Avenue, from the western City limits to the Menomonee River*
- *Blue Mound Road, from the western City limits to I-41*

The subarea plans will address land use and development, urban design, and access and mobility issues within each character area. The subareas will establish the guiding considerations, objectives, and priorities for each area, firmly establishing character and future intent. Each subarea will utilize graphics, illustrative plans, and images to demonstrate important local planning concepts.

### **6a: Community Subareas Charrette**

The Subareas Charrette is open to the entire community and will focus on the North Avenue and Blue Mound Road subareas. The charrette will explore improvement and development scenarios that will serve as the basis for detailed development planning, concept visualization, redevelopment initiatives, implementation strategies and more. The intent is to create consensus around a preferred approach to improving, transforming, revitalizing, and investing in these key areas of the City.

### **6b: Preliminary Subarea Plans**

Subarea plans will be prepared to address land use and development, priority development opportunity sites, transportation and mobility, access and connectivity, parking, urban design and overall character, and other elements necessary to provide a detailed framework for each area. Concept plans will establish the framework for detailed implementation actions and identify the location, character, and intensity of key development opportunity sites.

### **6c: Steering Committee Meeting**

The preliminary Subarea Plans for North Avenue and Blue Mound Road will be presented and discussed with the Steering Committee. The intent will be to secure consensus on the overall framework and concepts for the subareas in sufficient detail and to provide the necessary direction for concept refinement and development concepts and visualization.

### **6d: Catalyst Site Development Concepts (Three per Subarea)**

As part of the subarea planning, sketch plans illustrating potential site configurations will be developed for key redevelopment sites identified in the existing conditions analysis step. The sketch concepts will establish use programs, parcel division, lot/building orientation and layout, parking layout, access, circulation, buffering, landscaping, and open space/detention. These sketch concept



plans will explore different mixes and approaches to assist in attaining the best use and desired development characteristics within the subarea.

## **Step 7: Draft Comprehensive Plan**

Based on the previous steps and tasks in the planning process, the draft version of the Comprehensive Plan will be prepared and presented for review.

### **7a: Draft Comprehensive Plan Document**

Based on feedback received in Step 5 the Project Team will prepare the draft Comprehensive Plan document that synthesizes the findings and recommendations contained in these deliverables. The plan will be user-friendly, highly illustrative, and visually compelling. Concise, well-written text will be combined with attractive and easy-to-understand maps, graphics, illustrations, and photographs to effectively communicate the Plan's policies and recommendations. The new Wauwatosa Comprehensive Plan will include all draft elements from Steps 4 and 5 and will meet or exceed all state requirements for comprehensive planning in the State of Wisconsin.

### **Implementation Element**

The new Wauwatosa Comprehensive Plan will include an Implementation Element that will describe the actions required to carry out the policies contained in the Comprehensive Plan, including identifying potential short-, medium-, and long-range strategies and recommendations related to zoning and other land use regulations, potential capital improvement projects, funding sources and implementation methods, timing and prioritization, and general administration, management, and a clear process for timely updates to the Comprehensive Plan. The Project Team will work with staff to ensure that these implementation recommendations are practical and actionable.

### **7b: Staff Review (web meeting)**

The Project Team will submit the draft Comprehensive Plan and document to staff in electronic format for final review. It is anticipated that the plan will be subjected to a two- or three-stage review process.

### **7c: Steering Committee Working Session**

A final meeting will be conducted with the Steering Committee to review and reach an agreement on the draft Comprehensive Plan document before proceeding to the public review and adoption process. Appropriate revisions to the draft Plan will be made based on feedback from the Steering Committee and the final Comprehensive Plan will be prepared for community open house presentation.

### **7d: Community Open Houses (up to four)**

Members of the Project Team, along with City staff, will be present for a community open house to allow residents and community stakeholders the opportunity to examine, discuss, and comment on the contents of the draft Comprehensive Plan document. The Project Team will be available throughout the community open house to present material, answer questions, and get feedback before initiating the approval process.

*The community open houses can be conducted in various locations throughout the City during one trip on consecutive days, including two daytime events, and two evening events.*

### **7e: Plan Commission Presentation**

The Project Team will present the draft Comprehensive Plan document at one (1) Plan Commission meeting.

#### **7f: Joint Council Committee/Common Council Adoption**

The Project Team will present the draft Comprehensive Plan document for adoption at a Joint Council Committee/Common Council meeting.

#### **7g: Final Comprehensive Plan Document**

Following the community open house and presentations, the Project Team will work with City staff to revise the draft Comprehensive Plan. It is anticipated that up to two additional review cycles may be necessary to incorporate any final changes.

#### **7h: Interactive Executive Summary**

The planning process for Wauwatosa will yield a traditional “long-form” plan. The plan document will allow for printing and on-screen viewing and easy distribution, searching, and navigation. In addition, we can leverage ArcGIS Online StoryMaps to create an “app,” providing an interactive Executive Summary version of the Comprehensive Plan. Combined with photos, text, and other media, ArcGIS Online will power interactive maps that can be queried and explored, providing an engaging, “digital” way to experience the Comprehensive Plan. Content will be interwoven with attractive maps, visuals, and interactive content that simplifies navigation between related, cross-referenced components of the plan. This step will take place after the Comprehensive Plan is adopted, as it cannot be completed before adoption.

### **Step 8: Diagnostics Memo**

Building on the general assessment of the City’s current zoning code (Title 24) conducted in Task 3c, this step begins with a thorough review of the City’s existing Zoning Code to determine the strengths and weaknesses of the existing regulations.

#### **8a: Review and Assessment of Existing Zoning Code**

The review and assessment of the existing Zoning Code will entail a detailed chapter-by-chapter, section-by-section review, highlighting areas where the existing regulations, standards, procedures, processes, and other requirements are problematic.

#### **8b: Review Development Proposal and Zoning Relief Approval History**

The City’s recent history of development proposals and applications for zoning relief will be reviewed to identify “pain points” in bringing forward development. This review and assessment will reveal where the current code does not align with existing development or with the types of development that are market viable and deemed desirable by Wauwatosa’s elected and appointed officials.

#### **8c: Regulations Testing**

The conformity analysis will be conducted to test existing development conditions against the bulk and use standards of the current code. This level of analysis is important, not only to determine if existing development is consistent with the existing code, but to fully understand the impact of new regulations on existing development, so as not to inadvertently create an excessive amount of legal non-conforming structures. The updated Zoning Code will need to not only appropriately guide and regulate new development going forward but must also work with the existing building stock and development pattern in built out areas of the City.

#### **8d: Land Use Plan and Zoning Map Alignment Analysis**

The land use plan and zoning map alignment analysis will identify areas where the land use category assigned to an area in the future land use map is not supported by that area’s zoning district. This analysis is important to understand where the City’s current zoning districts are deficient in their ability to accommodate and realize the vision for the future of development in Wauwatosa.

#### **8e: Best Practices Research**

The existing regulations will be measured against policies and recommendations provided in the recently adopted Comprehensive Plan, comparable zoning codes in the region, and national best practices.

#### **8f: Diagnostics Memo**

The findings and analysis will be compiled into a Diagnostics Memo. The Diagnostics Memo will describe the issues with current regulations, and the concerns and priorities identified by City staff, previous planning efforts, and our detailed analysis. The Diagnostics Memo will include narrative text, diagrams, tables, maps, and photographs.

#### **8g: Staff Review (web meeting)**

The Diagnostics Memo will be delivered to staff prior to presenting our findings to Plan Commission. Appropriate revisions will be made based on feedback from City staff before distributing to Plan Commission for their review.

#### **8h: Plan Commission Presentation**

A meeting will be conducted with Plan Commission members to review and discuss the Diagnostics Memo.

### **Step 9: Preliminary Zoning Recommendations Memo**

After receiving feedback from City staff and Plan Commission on the Diagnostics Memo, the Preliminary Recommendations Memo will be developed.

#### **9a: Zoning Code Restructuring**

A zoning code should be organized in a manner that makes it straightforward to use and administer. This type of user-friendly code orders sections based on how frequently they are used and referenced. This portion of the Preliminary Recommendations Memo will include a proposed chapter structure and, if deemed appropriate based on the results and feedback received on the Diagnostic Memo, will include details on where existing code sections and subsections should be relocated in the new code.

#### **9b: District Specific Recommendations**

The district specific recommendations in the Preliminary Recommendations Memo will be based on the results and feedback received on 8b, 8c, and 8d of the Diagnostic Memo. These recommendations could include the establishment of new districts, consolidation and/or elimination of current districts, updates to bulk and dimensional standards, and revisions to the schedule of uses.

#### **9c: Development Standards and Use Specific Standards Recommendations**

Development standards, often called standards of general applicability, include regulations that are relevant for all uses throughout all zoning districts. These typically include off-street parking and loading, landscaping, fences, screening, etc. Use specific standards are detailed standards applicable to specific uses such as accessory buildings, drive-throughs, or outdoor storage, regardless of the district in which they are located. Development standards and use specific standards are essential tools that ensure quality, as-of-right development in a municipality. The development standards and use specific standards recommendations in the Preliminary Recommendations Memo will focus on updates to the City's current standards to align them with relevant recommendations of the City's Comprehensive Plan.

#### **9d: Administrative and Enforcement Recommendations**

Often, the development approval process is as much a factor in capturing local investment as actual development regulations. The administrative and enforcement recommendations portion of the

Preliminary Recommendations Memo will be based on the results and feedback received on 1a of the Diagnostic Memo. These recommendations will focus on identifying straightforward approvals that can be handled administratively by staff, layers of review that can be better coordinated or consolidated, and whether decision making bodies have clear review criteria that provide fair certainty to applicants and Wauwatosa residents.

**9e: Preliminary Recommendations Memo**

The Preliminary Recommendations Memo will include the items developed as a part of steps 2a-2d as well as identify strategies for how to proceed and what to prioritize.

**9f: Staff Review (web meeting)**

The Preliminary Recommendations Memo will be delivered to staff prior to presenting our findings to Plan Commission. Appropriate revisions will be made based on feedback from City staff before distributing to Plan Commission for their review.

**9g: Plan Commission Presentation**

A meeting will be conducted with Plan Commission members to review and discuss the Preliminary Recommendations Memo.

# Fee Proposal

Houseal Lavigne proposes a lump sum, not-to-exceed fee of **\$283,823** for the City of Wauwatosa Comprehensive Plan, including all professional fees and directly related project expenses.

Step	Fee
<b>Step 1:</b> Project Initiation	\$ 23,175
<b>Step 2:</b> Community Engagement	\$ 34,035
<b>Step 3:</b> Existing Conditions Analysis	\$ 38,660
<b>Step 4:</b> Vision, Goals, and Preliminary Land Use Element	\$ 23,340
<b>Step 5:</b> Preliminary Elements	\$ 46,700
<b>Step 6:</b> Subarea Planning (Two Corridor Subareas)	\$ 42,530
<b>Step 7:</b> Draft Comprehensive Plan	\$ 45,675
<b>Step 8:</b> Diagnostics Memo	\$ 14,938
<b>Step 9:</b> Preliminary Recommendations Memo	\$ 14,770
<b>Total Professional Fees (Not-To-Exceed Cost)</b>	<b>\$ 283,823</b>

*Note - the following steps reflect costs revised from the initial proposal:*

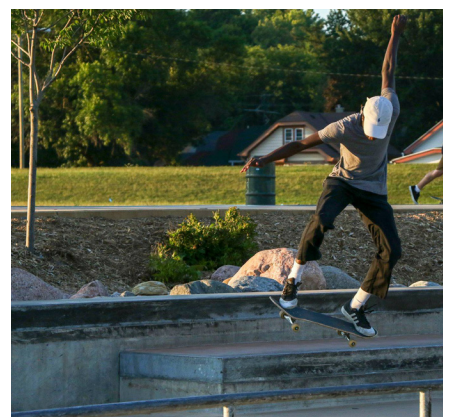
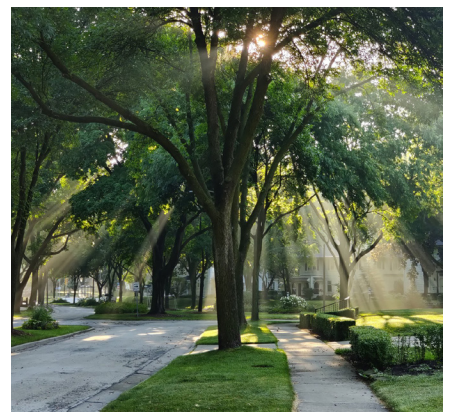
- *Step 1 reflects a revised cost to add Task 1g: Community Kickoff Meeting (moved from 2g)*
- *Step 2 reflects a revised cost to remove one of the Community Visioning Workshops in Task 2g (moved to 1g)*
- *Step 6 is a new addition to the scope of work, removing the optional task, and adding two Corridor Subareas with Catalyst Sites and a workshop/charrette*
- *Step 7 reflects the cost for the Interactive Executive Summary (\$11,415)*
- *Steps 8 and 9 are new additions to the scope of work for a Zoning Audit, including a Diagnostics Memo and a Preliminary Recommendations Memo*

City of Wauwatosa, Wisconsin

# Comprehensive Plan

Proposal

January 26, 2023



**HOUSEAL  
LAVIGNE**





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January 26, 2023  
City of Wauwatosa  
Laurel Schleimer  
7725 W. North Ave  
Wauwatosa, Wisconsin 53213

Ms. Laurel Schleimer,

Houseal Lavigne is pleased to submit this proposal for the Comprehensive Plan for the City of Wauwatosa. Our project team is uniquely qualified to undertake this assignment, bringing insight, expertise, and understanding together with regional and national experience gained from collaborating with communities throughout the Midwest and the country, including Wisconsin projects in Oak Creek, Fond du Lac, Oshkosh, and Milwaukee.

Houseal Lavigne is an award-winning community planning, urban design, and economic development consulting firm with experience in a range of assignments, including comprehensive planning, community engagement, visioning, corridor planning, economic development, parks and open space, market, economic and fiscal analysis, and implementation. Since our inception, Houseal Lavigne has worked with more than 400 communities in 28 states and developed over 200 comprehensive plans. Through our work, we ensure each community receives the highest quality plan and pride ourselves on providing innovative and forward-thinking ideas.

Houseal Lavigne was awarded the National Planning Excellence Award for an Emerging Planning and Design Firm from the American Planning Association (APA), specifically noting our innovation, implementation success, creative and effective outreach, integration of new technologies, industry-leading graphic communication, and our overall influence on the profession of planning in the United States. We have also won multiple APA awards in several states, for our comprehensive plans, community outreach, innovation, corridor plans, technology applications, and implementation. Most recently, our innovation in planning has been recognized by the APA Technology Division's 2020 Smart Cities Award and Esri's 2021 Special Achievement in GIS Award.

We are available to undertake the assignment immediately upon selection and meet all deliverable dates and milestones. We would like to note that our entire scope of work and approach to community outreach is responsive to the impacts of the pandemic. We have successfully adapted our community outreach for current projects throughout the country including meetings with boards, commissions, and staff to a virtual format, as needed.

Our team would be thrilled to work with the City of Wauwatosa. We appreciate the opportunity to submit our proposal for this important project and look forward to the prospect of collaborating with you and the entire Wauwatosa community on the new Comprehensive Plan. I will be the primary point of contact for the proposal, if you have any questions regarding this submittal, please do not hesitate to contact me.

Sincerely,

A handwritten signature in blue ink, appearing to read 'John Houseal', with a long horizontal flourish extending to the right.

John Houseal, FAICP  
Co-Founder, Principal  
(312) 372-1008 x101  
jhouseal@hlplanning.com

PLANNING

DESIGN

DEVELOPMENT





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SECTION 1

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# **FIRM DESCRIPTION AND QUALIFICATIONS**



# Team Qualifications

Our project team for the City of Wauwatosa Comprehensive Plan is made up of a team of professionals with specialized expertise in all areas of comprehensive planning, downtown and corridor planning, neighborhood and special area planning, economic development and market analysis, community outreach and engagement, zoning, and implementation. Our project team has been specifically assembled to provide the City of Wauwatosa with a responsive, effective, creative, and specifically unique plan for the Comprehensive Plan assignment for the City of Wauwatosa.



**Houseal Lavigne** is an award-winning consulting firm specializing in all areas of land development regulations, community planning, urban design, and economic development. We have expertise and experience with assignments of all scales, including regional, city-wide, subarea, district, and site-specific planning and design. We strive for a true collaboration of disciplines and talents, infusing all our projects with creativity, realism, and insight.

Houseal Lavigne provides a fresh approach to urban planning, a strong foundation in contemporary development practices, an insightful understanding of market and economic analysis, and an effective ability to conduct engaging community outreach. Our firm is able to meet the unique challenges of any assignment and develop creative solutions that ensure compatibility between the built and natural environments.

Houseal Lavigne consists of a team of dedicated professionals experienced in zoning and development regulations, urban planning and design, economic development, and geospatial services. We have worked with more than 400 communities across the country on a wide variety of planning, design, and development related projects.

Houseal Lavigne is built on a foundation of excellence in customer service, strong professional relationships, and most importantly, client satisfaction. Our commitment is to provide unparalleled support, responsiveness, and creativity to our clients as they address the challenges and opportunities confronting their communities.

Houseal Lavigne is founded on a set of core principles that, when combined with our professional experience and expertise, creates a consulting firm that stands above the rest. Since the firm's founding in 2004, Houseal Lavigne has established itself as one of the Nation's premier planning and design firms.

Houseal Lavigne is an innovation-based firm and the nationally recognized leader in the emerging field of Geodesign, spatial analytics, and evidence-based planning and decision-making. By integrating the latest available technologies into the process, we are able to blend the art and science of planning and deliver more responsive and effective recommendations, 3D scenarios informed with data, and better rationale to support land use and development policy.

## Services

Comprehensive Planning

Retainer Services

Development Services

Design Guidelines

Zoning/Regulatory Controls

Neighborhood &  
Subarea Planning

Downtown Planning

Transit-Oriented Development

Corridor Planning

Land Planning & Site Design

Park, Recreation &  
Trail Master Planning

Market & Demographic Analysis

Fiscal/Economic Impact Analysis

## Firm Location

Houseal Lavigne  
188 West Randolph Street, Suite 200  
Chicago, IL 60601

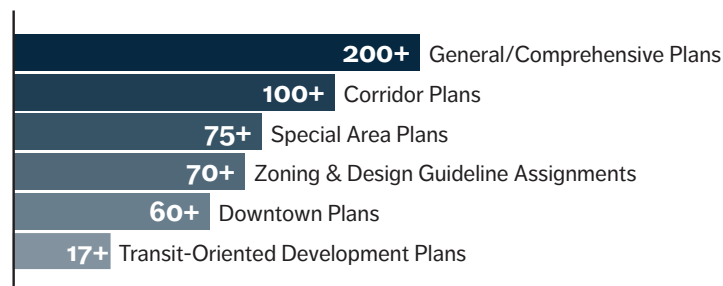
360 E 2nd St #800  
Los Angeles, CA 90012

Firm Size  
15+ Employees

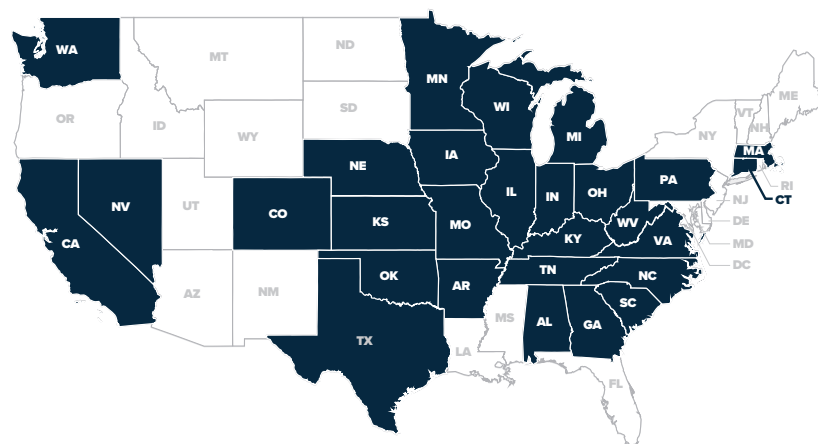


**Houseal Lavigne** is an innovation-based urban planning and design firm. We pride ourselves on creativity, collaboration, and delivery of quality. Our team approach is built on strong relationships, the exchange of ideas, and a commitment to the integration of technology. Our priorities are to do good, have fun, work hard, and provide responsive, visionary, and viable solutions to our clients and partners.

OVER THE LAST 15 YEARS,  
WE HAVE WORKED ON MORE THAN **450 PLANS** ACROSS MORE THAN  
**400 COMMUNITIES** NATIONWIDE. WE HAVE DIRECTED...



OUR **NATIONAL EXPERIENCE** INCLUDES PLANNING,  
DESIGN, ECONOMIC, AND ZONING ASSIGNMENTS IN...



## Services

- Comprehensive Planning
- Neighborhood & Subarea Planning
- Zoning/Regulatory Controls
- Downtown Planning
- Transit-Oriented Development
- Corridor Planning
- Design Guidelines
- Land Planning & Site Design
- Park, Recreation &
- Trail Master Planning
- Market & Demographic Analysis
- Fiscal/Economic Impact Analysis
- Development Services
- Retainer Services

## Office Location

188 W. Randolph Street, Suite 200  
Chicago, Illinois 60616  
(312) 372-1008  
360 E 2nd Street, Suite 800  
Los Angeles, CA 90012



## GIS & Geospatial Technology

GIS and Geospatial technologies are an integral part of all our services areas, including Comprehensive Planning, Land Planning & Site Design, Visualization, and Community Engagement efforts. Houseal Lavigne Associates (HLA) is an Esri Gold Business Partner and has been designated with the ArcGIS Online Specialty and Release Ready Certifications that recognizes our expertise in the implementation and utilization of the ArcGIS Platform.

HLA is one of a select few Urban Planning firms in the United States that have been awarded the ArcGIS Urban Specialty Designation further exemplifying our commitment to being on the forefront of GIS technology for urban planning.



## Project Examples

A detailed list and description of similar projects including contract amount, project lead, and client contact information is provided in the Appendix on page 42.

## Founding Principles

Houseal Lavigne began with a set of founding principles that still guide every project we undertake. By continually honoring these principles, we have reliably and repeatedly served our clients, established trust and strong professional relationships, and produced results that exceed expectations, and developed plans that have served as points of pride for communities. By adhering to our founding principles, we have emerged as one of the most respected, trusted, innovative, and effective firms in the industry. Our founding principles are:

**Better Community Outreach.** We believe strongly in fostering a sense of “community stewardship” by using an inclusive approach to stakeholder engagement as a foundation for all our projects.

**Commitment to Creativity.** We believe vision and creativity are among the most important components of good planning and design, and we pledge to provide fresh, responsive, and intriguing ideas for local consideration.

**Graphic Communication.** We believe all planning processes and documents should utilize a highly illustrative and graphic approach to better communicate planning and development concepts in a user-friendly, easy to understand, and attractive manner.

**Technology Integration.** We believe the integration of emerging technologies should be used to improve the planning process and product - improving public engagement and involvement, fostering evidence-based decision-making, and producing more effective documents and recommendations.

**Client Satisfaction.** We believe meeting the needs of our clients is a top priority and we strive to achieve it by developing and maintaining strong professional relationships, being responsive to clients’ concerns and aspirations, and always aiming to exceed expectations.

## Award-Winning Innovative Planning

As a testament to our firm’s overall approach and project methodologies, Houseal Lavigne is frequently recognized across the country and honored with awards and special recognition. Houseal Lavigne has received multiple awards for “Best Plan” from several state chapters of the American Planning Association (APA) in categories including comprehensive plan, strategic plan, community outreach, innovation, healthy communities, and best tool or practice. Houseal Lavigne has also been awarded the APA’s National **Planning Excellence Award for an Emerging Planning and Design Firm**. Upon receiving the award, the APA recognized our innovative planning approach, targeted implementation strategies, creative and effective outreach, integration of emerging technologies, industry-leading graphic communication, and noted our firm’s overall influence on the planning profession across the United States.

We are increasingly recognized for our innovative approach to planning and the strategic use of technology. For example, in 2020 we received the **American Planning Association – Technology Division’s Smart Cities Award** and **Esri’s Special Achievement in GIS SAG Award** for the Land Use Plan and Town Center 3D Scenarios Visualization for the Town of Morrisville, SC. Both awards recognized the innovative use of tools and software including CityEngine and Unreal Engine to visualize and analyze different land use scenarios. In 2021, we were again awarded the Esri SAG Award for our work in developing a 3D immersive model for the Village of Glen Ellyn, IL to review development proposals with its historic downtown.

## Recent Awards

### 2022

CO APA General Planning Award (Honors)  
Your El Paso Master Plan

CO APA General Planning Award (Merit)  
Picture Cañon City Comprehensive Plan

CA APA Inland Empire Section Excellence Award  
Large Jurisdiction Comprehensive Plan Category  
Riverside Housing Element

### 2021

CO APA General Planning Award  
Gunnison Comprehensive Plan

### 2020

Smart Cities Award  
American Planning Association  
Technology Division  
Land Use Plan/Town Center  
Morrisville, North Carolina

Special Achievement in GIS Award (Esri)  
Land Use Plan/Town Center  
Morrisville, North Carolina

### 2019

CO APA General Planning Award  
Aurora Places Comprehensive Plan

### 2018

IL APA Healthy Active Community Award  
Healthy Chicago 2.0

Special Achievement in GIS Award (Esri)  
Oshkosh Corporation World Headquarters / Lakeshore  
Redevelopment

VA APA - Commonwealth Plan of the Year Award  
Bristol Comprehensive Plan

### 2017

IL APA - Outreach Award  
Envision Oak Park Comprehensive Plan

### 2016

MN APA - Innovation Award  
St. Cloud Comprehensive Plan

### 2015

MI APA - Daniel Burnham Award (Best Plan)  
Imagine Flint Master Plan

### 2014

American Planning Association  
National Planning Excellence Award  
for an Emerging Planning & Design Firm

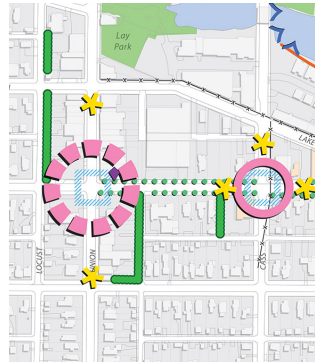
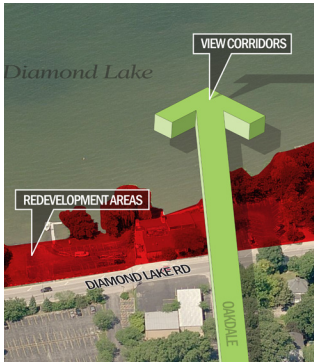
MI APA - Planning Excellence Award for Public Outreach -  
Imagine Flint Master Plan

IA APA - Daniel Burnham Award (Best Plan)  
Coralville Community Plan



# Approach to Planning

Our philosophy of community planning, visioning, goal setting, and implementation is built on a foundation of professional experience, sound planning and design practices, and a track record of award-winning projects. Our approach combines extensive community outreach and participation, highly illustrative and user-friendly maps and graphics, and utilization of available technologies. Our process will help establish a community vision, set community goals, and foster community consensus. Our approach to this assignment will include and be guided by the following core principles, which will allow us to successfully engage the community, develop viable and visionary solutions, and comprehensively respond to local issues and needs.



## Focus on Urban Planning and Community Development

Houseal Lavigne specializes in community planning, urban design, and economic development. It is our focus, it is our passion, and it is our area of expertise. We are a specialized urban planning firm whose efforts are not diluted or compromised by bureaucracy or competing interests. Our focus and size allow us to provide the creativity, flexibility, and responsiveness needed to meet our clients' needs without wasting precious resources.

## Foundation of Experience

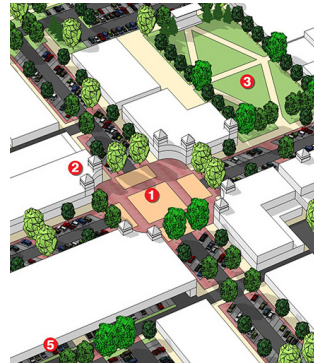
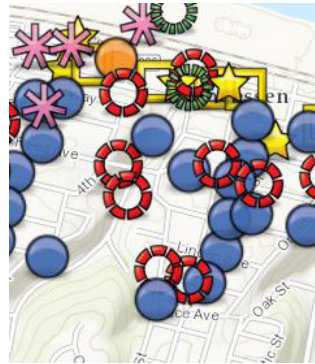
Houseal Lavigne has extensive experience in community planning, visioning and goal setting, implementation strategies, comprehensive planning, economic development studies, urban design, and more. We have directed, managed, and assisted with similar planning assignments for communities across the country.

## Engaging Community Outreach

One of our greatest strengths is our ability to design and conduct engaging and effective community outreach. It is a vital part of all of our planning projects, and we believe it is a necessary component of any successful planning process. It is important that all interested persons have the ability to participate in the planning process, and to know they have been heard and their opinion taken into consideration. We believe strongly in fostering a stewardship for the community and achieving a high level of community consensus for planning initiatives.

## Illustrative Format and Quality Graphics

All our projects incorporate a highly illustrative and graphic approach to communicating planning and development policies and recommendations. We have developed a distinct design approach to urban planning and community development projects which we incorporate into all our projects. The results of this approach are reports and plans that are attractive, distinctive, and easy to use and understand.



## Technology Integration

Integrating appropriate technologies can greatly improve the planning process and product. We specialize in the use of GIS and geospatial analysis, designing and hosting project websites, on-line surveys, interactive real-time polling, and utilizing 3-D rendering to improve planning and development concepts. Our maps and graphics are attractive and compatible with existing and developing information systems. When designed and managed appropriately, these technologies greatly improve communication and involvement with the public.

## Vision, Creativity, and Innovation

We believe vision and creativity are among the most important components of good planning and design. Too often, vision and creativity are lacking in the planning process and final planning product. With the help of the community, we will establish a "Vision" that captures the local spirit and character, while presenting new ideas and concepts for consideration. Our fresh approach to planning and development will broaden the range of available options and maximize the potential of community resources.

## Targeted Implementation

Identifying the "next steps" to be taken is an important part of any good plan. Plans are not meant to sit on a shelf gathering dust but should be used on a regular and on-going basis as a foundation for decision-making. Our plans identify key implementation steps that should be taken to "jump start" the ultimate realization of the Plan's vision and recommendations. Implementation steps outline the projects and actions to be taken and identify responsibilities, timing, and funding options.

## Commitment to Client Satisfaction

Our Firm's primary focus is on client satisfaction. We pride ourselves on our professional relationships, reputation, and client references. We develop strong relationships with our clients and are often considered "an extension of staff." We are responsive to clients' concerns, available at any time to assist with unforeseen events and issues and are committed to doing whatever it takes to serve the client. Many of our "one-time" projects result in long-term on-going professional relationships with client communities.





SECTION 2

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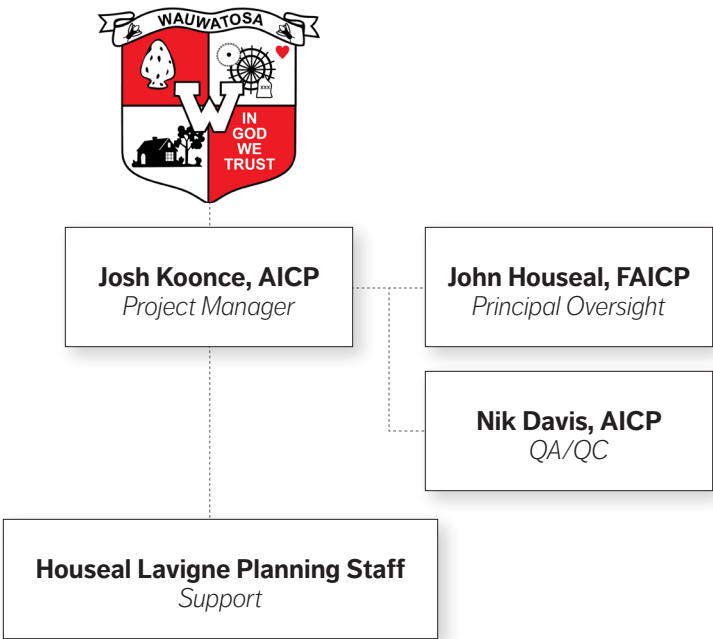
# PERSONNEL





# Organizational Chart

The organizational chart is provided for the core members of the project team. Supporting staff will assist with the project as needed. Key support staff resumes are included on the following pages.



## Education

Master of Environmental Planning,  
Arizona State University

Bachelor of Environmental Sciences,  
University of Michigan

## Memberships

American Planning Association (APA)

American Institute of Certified Planners  
Inducted Fellow (FAICP)

Lambda Alpha International

Oak Park-River Forest Community Foundation  
Board of Directors

## Awards

2022 APA-CO General Planning Award  
(Honors)  
Your El Paso Master Plan

2022 APA-CO General Planning Award (Merit)  
Picture Cañon City Comprehensive Plan

2021 APA-CO General Planning Award:  
Gunnison Comprehensive Plan

2019 APA-CO General Planning Award:  
Aurora Places Comprehensive Plan

2017 APA-IL Outreach Award:  
Envision Oak Park Comprehensive Plan

2016 APA-MN Innovation Award:  
St. Cloud Comprehensive Plan

2015 APA-MI Daniel Burnham Award (Best  
Plan): Imagine Flint Master Plan

2014 APA National Award for Excellence  
Emerging Planning and Design Firm

2014 APA-MI Public Outreach Award:  
Imagine Flint Master Plan

2014 APA-IA Daniel Burnham Award:  
Coralville Community Plan

2014 Congress for New Urbanism  
Mackinac Award for Outstanding Plan:  
Imagine Flint Master Plan

2012 APA-IL Daniel Burnham Award:  
Downers Grove Comprehensive Plan

2010 APA-IL Strategic Plan Award:  
River Forest Corridors Plan

2009 APA-IL Implementation Award:  
Ogden Avenue Enhancement Initiative

2007 APA-IL Daniel Burnham Award:  
Carpentersville Comprehensive Plan

## AICP Certification Instructor

APA National and APA State Chapters  
(2005 to Present)

www.planningprep.com  
(site's co-creator)

# John A. Houseal FAICP

## Partner

John is a Partner and Co-founder of Houseal Lavigne and has established himself as one of the nation's top urban planning professionals. John has been inducted in the College of Fellows of the American Institute of Certified Planners, the highest recognition and distinction awarded by the American Planning Association. John's reputation and expertise within the profession as a leader in urban planning, innovation, contemporary development practices, and community outreach has garnered him wide recognition and numerous planning awards. John has been a featured speaker at national, regional, state, and local events and conferences for issues related to urban planning, zoning, transportation, context sensitive design, innovation, graphic communication, and the environment. John is recognized as one of the top community facilitators, consensus builders, and citizen participation experts in the profession.

John maintains professional memberships with the American Planning Association and the American Institute of Certified Planners. John received a Bachelor of Science in environmental sciences from University of Michigan and a Master of Environmental Planning for environmental planning and urban planning from Arizona State University. John is also an AICP certification instructor and has been responsible for training more than 1,000 planners for professional certification since 2005. John also sits on the Board of Directors for the Oak Park and River Forest Community Foundation and serves as the Co-chair of the CommunityWorks Advisory Board, overseeing community initiatives related to environmental sustainability, community leadership training, and programs aimed at the success of all youth in the community.

Prior to co-founding Houseal Lavigne, John was a Principal and the Director of Urban Planning for URS Corporation, a global multi-disciplinary engineering firm. Working from the Michigan Avenue office in Downtown Chicago, John oversaw and directed the firm's urban planning and community development projects, often coordinating on assignments throughout the country.

## Project Experience

### Zoning & Design Guidelines

45+ Zoning & Design Guidelines  
Assignments, including:

- Ardmore, OK
- Benton Harbor, MI
- Bentonville, AR
- Bloomington, IL
- Brookfield, IL
- Cañon City, CO
- Cary, IL
- Carpentersville, IL
- Carol Stream, IL
- Cary, IL
- Chicago, IL
- Dunwoody, GA
- Fairview Heights, IL
- Flint, MI
- Geneva, IL
- Hainesville, IL
- Harwood Heights, IL
- Hinsdale, IL
- Jenks, OK
- Jackson, TN
- Kenilworth, IL
- Marion, IA
- McHenry, IL
- Melrose Park, IL
- Montgomery, IL
- Muskogee, OK
- Murray, KY
- Northbrook, IL
- Oak Brook, IL
- Oakbrook Terrace, IL
- Oak Creek, WI
- Verona, WI

### Comprehensive Plans

80+ Comprehensive Plans including:

- Aurora, CO
- Benton Harbor, MI
- Bentonville, AR
- Brownsburg, IN
- Cañon City, CO
- Coralville, IA
- Council Bluffs, IA
- Edinburgh, IN
- Flint, MI
- Frederick, CO
- Greater Bridgeport Region, CT
- Jackson, MO
- Jackson, TN
- Marion, IA
- Oak Park, IL
- Palos Park, IL
- Prairie Grove, IL
- River Forest, IL
- St. Cloud, MN
- Tipton, IN
- Windsor, CO

### Downtown Plans

40+ Downtown Plans including:

- Bentonville, AR
- Downers Grove, IL, Downtown
- Forest Park, IL, Madison Street Corridor
- Geneva, IL, Downtown Master Plan
- Oshkosh, WI Downtown Plan
- Round Lake, IL, Downtown Plan
- St. Joseph, MI

### Special Area Plans

50+ Special Area Plans, including:

- Bellwood, IL, TOD master Development Plan
- Countryside, IL, Dansher Industrial Park Subarea Plan
- Glenview, IL, The Glen Parcel 24 Master Plan
- Montgomery Preserve Subarea Master Plan
- Naperville, IL, Martin Mitchell Campus Master Plan
- Oak Brook, IL, Commercial Areas Master Plan
- Palos Park, IL, Commercial Areas Master Plan

### Corridor Plans

70+ Corridor Plans including:

- Hinsdale, IL, Odgen Avenue Corridor Plan
- IL 47 Corridor Study
- Naperville, IL, Ogden Avenue Enhancement Study
- Oak Brook, IL, 22nd Street Corridor Plan
- Portage, IN, Highway 20 Corridor Plan
- Pace TOD Guidelines Manual
- Prairie Grove, IL
- Richton Park, IL
- River Forest, IL
- Sunset Hills, MO
- Wilmette, IL



## Education

Bachelor of Science in Landscape Architecture,  
Purdue University

## Memberships

American Planning Association (APA)

Illinois American Society of Landscape Architecture (IL-ASLA)

## Certifications

American Institute of Certified Planners (AICP)

## ASLA Positions

IL-ASLA Allied Professionals Liaison

IL-ASLA Legacy Project Co-Chair

Past IL-ASLA Public Awareness Chair

Past IL-ASLA External  
Communications Officer

## APA-IL Positions

Co-Chair for the Marketing Committee

## Presentations

2015 National APA Planning Conference:  
New Tools for Zoning &  
Development Visualization

2013 National APA Planning Conference:  
Putting Zoning on the Map

2012 APA-CMS:  
Integrating Sustainability  
Into Development Regulations

2011 APA-IL State Conference

## Awards

2020 ESRI Special Achievement in GIS Award:  
Morrisville Land Use Plan/  
Town Center Immersive Experience

2020 APA Smart Cities Award:  
Morrisville Land Use Plan

2019 APA-CO General Planning Award:  
Aurora Places Comprehensive Plan

2018 APA-VA Plan of the Year:  
Bristol Virginia Comprehensive Plan

2018 Special Achievement in GIS Award:  
Oshkosh Lakeshore Development

2016 APA-MN Innovation Award:  
St. Cloud Comprehensive Plan

2014 APA-MI Public Outreach Award:  
Imagine Flint Master Plan

2009 IL-ASLA Honor Award for  
Environmental Stewardship:  
Winnebago County 2030 Land  
Resource Management Plan

# Nik Davis AICP

## Principal

Nik is a Principal at Houseal Lavigne, bringing with him over 15 years of professional design and planning experience. He manages much of the firm's versatile studio work, as well as hones skill specializations in urban design, planning, geodesign, landscape architecture, site plan development, streetscape design, and Euclidean and form-based development regulations. Nik provides the connection between the plan making process and document creation, focusing on concept and site design, visualizations, document layout, and urban-form 3D modeling, using a breadth of drafting techniques and software tools.

Nik received his Bachelor's degree in Landscape Architecture from Purdue University. Prior to joining Houseal Lavigne, Nik worked for consulting firms specializing in development planning, urban design, streetscape design, zoning, and landscape architecture, where he was awarded recognition in sustainability and environmental stewardship by the Illinois Chapter of ASLA.

Nik enjoys the challenge of ensuring that plan recommendations and zoning ordinances correlate to what gets built, and therefore works to ensure that community goals and urban design expectations are grounded in reality and site-based limitations. He approaches his role as a problem solver, acting to understand how a community's local history and current challenges can be improved through technical tools, such as design guidelines, zoning codes, and development regulations. Through projects like Traverse City, Michigan's corridor master planning project and Baltimore, Maryland's zoning code revision, Nik was able to create graphics and documents that navigate the reader from public input and problem identification, to goal setting and recommended action, in a way that is elevated by high-quality illustrations and document layout.

## Project Experience

### Comprehensive Plans

- Aurora, CO
- Bentonville, AR
- Bristol, TN
- Cape Cod, MA
- Cary, IL
- Centerton, AR
- Council Bluffs, IA
- Crete, IL
- Eden Prairie, MN
- Elgin, IL
- Flint, MI
- Fort Dodge, IA
- Frederick, CO
- Galesburg, IL
- Glen Ellyn, IL
- Hawthorn Woods, IL
- Hudson, OH
- Jackson, TN
- Lynwood, IL
- Maywood, IL
- Muskogee, OK
- New Buffalo, MI
- Oak Park, IL
- Pleasant Hill, IA
- Richton Park, IL
- Sioux City, IA
- St. Charles, IL
- St. Cloud, MN
- Westmont, IL
- Windsor, CO

### Corridor Plans

- Bentonville, AR
- Des Plaines, IL\*
- Elmhurst, IL
- Island Lake, IL
- Homer Glen, IL
- Kenilworth, IL
- New Lenox, IL
- Park Ridge, IL\*
- Peoria Heights, IL
- Portage, IN
- Rolling Meadows, IL
- Traverse City, MI

### Downtown/TOD Plans

- Carbondale, IL
- Carson City, NV
- Elmhurst, IL
- Fort Dodge, IA
- Geneva, IL
- Hudson, OH
- Lawrence, KS
- Lisle, IL
- Rolling Meadows, IL

### Streetscape Designs

- Bradley, IL - Broadway Street
- Chicago, IL - 87th & Stony, Lake Street, Uptown-Broadway Avenue, Auburn Gresham-79th Street
- Elmhurst, IL - North York
- Glen Ellyn, IL
- Huntley, IL
- New Buffalo, MI
- Richton Park, IL

### Design Guidelines & Standards

- Chicago, IL - Archer & Halsted
- Council Bluffs, IA
- Elmhurst, IL
- Fort Dodge, IA\*
- Mundelein, IL
- Pace TOD Guidelines
- Portage, IN
- Richton Park, IL\*
- Traverse City, MI

### Zoning/Form-Based Codes

- Baltimore, MD\*
- Bentonville, AR
- Buffalo, NY\*
- Cleveland Heights, OH\*
- Council Bluffs, IA\*
- Dunwoody, GA
- Flint, MI
- Muskogee, OK

### Design Development & Concept Designs

- Bensenville, IL
- Chicago, IL
- Crystal Lake, IL
- Deerfield, IL\*
- Lincolnwood, IL
- Mokena, IL\*
- New Lenox, IL
- Richton Park
- St. Cloud, MN

*\*Work conducted at other firms*



## Education

Masters of Urban and Environmental Geography, University of Illinois at Chicago

Masters of Urban Planning and Policy, University of Illinois at Chicago

Bachelor of Science in Anthropology, Michigan State University

## Certifications

NCI Charrette System™  
Certificate Training - Core Level

NCI Charrette  
Management and Facilitation™  
Certificate Training - Advanced Level

American Institute of Certified Planners (AICP)

## Memberships

American Planning Association (APA)

Illinois GIS Association

Chairman, APA Chicago Metro Section

Executive Committee Member,  
APA Illinois Chapter

Co-founder, Young Planners Group,  
APA Illinois Chapter

# Brandon Nolin AICP

## Practice Lead

Brandon is a Practice Lead at Houseal Lavigne with over 15 years of planning, urban design, and market analysis experience. Brandon specializes in comprehensive planning and economic development and is a self-described “numbers guy,” who uses his background in archaeology, statistics, and market research to develop data-driven plans that are both physically achievable and economically viable. Brandon has worked in communities of all shapes and sizes. He has created award-winning plans to reposition disinvested communities like Flint, MI and North Lawndale on Chicago’s west side; leverage key redevelopment opportunities in growing downtowns; revitalize aging commercial corridors in inner ring suburbs; and strengthen small rural towns and emerging suburban communities. Brandon also has extensive knowledge and experience in the use of Geographic Information Systems (GIS). GIS continues to evolve and Brandon strives to embed spatial analysis into all aspects of place-based recommendations like identifying areas underserved by infrastructure in Flint, MI or calculating the impacts of infill and redevelopment strategies in Jackson, TN.

Brandon has worked for Houseal Lavigne for more than 10 years and also gained valuable experience in his work at the Chicago Metropolitan Agency for Planning (CMAP), a regional planning agency. While at CMAP he directed several projects within the organization’s innovative local-planning and technical assistance program and helped tie on-the-ground development and local initiatives to regional policies. Brandon was also a member of a Chicago-based real estate research firm specializing in market and financial analysis in both the public- and private-sectors.

## Project Experience

### Comprehensive Plans

- Battle Creek, MI
- Benton Harbor, MI
- Brownsburg, IN
- Cary, IL
- Crothersville, IN
- Culver, IN
- Des Plaines, IL
- Downers Grove, IL
- El Paso County, CO
- Elgin, IL
- Fairview Heights, IL
- Flint, MI
- Freeport, IL
- Geneva, IL
- Glen Ellyn, IL
- Greater Bridgeport Regional Commission (GBRC), CT
- Highwood, IL
- Jackson, TN
- Marion, IA
- McHenry County, IL
- McKinley Park, Chicago, IL\*
- Minooka, IL
- Mundelein, IL
- North Lawndale, Chicago, IL\*
- Northfield, IL
- Oak Creek, WI
- Palos Park, IL
- Pingree Grove, IL
- St. Charles, IL
- St. Cloud, MN
- Summerville, SC
- Tipton, IN
- Tipton County, IN
- Westmont, IL
- Wyoming, MI

### Downtown Plans

- Cary, IL
- Highwood, IL
- Huntley, IL
- Lombard, IL
- Murray, KY
- St. Cloud, MN
- Wilmington, IL\*

### Special Area Plans (TOD, Neighborhoods, Special District)

- Crystal Lake, IL
- Clarendon Hills, IL
- Jefferson-Chalmers, Detroit, MI
- Flint, MI
- Geneva, IL
- Lombard, IL
- Marengo, IL
- Milwaukee, WI
- Murray, KY
- Skokie, IL
- South Chicago Heights, IL
- Sterling, IL
- Winfield, IL

### Zoning & Regulatory

- Benton Harbor, MI
- Fairview Heights, IL
- Flint, MI
- Harwood Heights, IL
- Marion, IA
- Murray, KY
- Muskogee, OK
- River Forest, IL

### Corridor Plans

- Cary, IL - US 14
- Freeport, IL - West Galena Avenue
- Kane and McHenry Counties - Illinois Route 47
- Lockport, IL - I-355 Corridor Master Plan
- Milwaukee, WI - 27th Street
- River Forest, IL - Village-wide Corridors Plan
- Springfield, MO - Grant Ave Parkway Corridor Plan
- St. Cloud, MN - Division Street
- Sugar Run Creek, Will County, IL - IL Route 53\*

### Market Analysis & Economic Development

- Bartlett, IL
- Brownsburg, IN
- Channahon, IL
- Chicago, IL\*
- Clarendon Hills, IL
- IL Housing Dev. Auth. (IHDA)\*
- Lake Barrington, IL
- Lincolnwood, IL
- Lombard, IL
- Milwaukee, WI
- Omaha, NE
- Palos Park, IL
- River Forest, IL

*\*Work conducted at other firms*

## Education

Master of Urban Planning,  
University of Kansas

Bachelor of Arts in Architecture,  
University of Kansas

## Memberships

American Planning Association (APA)

Rotary International

## Certifications

APA National Planning Conference: Leveraging  
Technology to Combat the Housing Crisis

APA-IL State Conference: Tackling the Housing  
Crisis: Is California's Approach a Model for  
Illinois

## Presentations

APA-IL State Conference:  
A Tale of Two Neighborhoods - Community  
Driven Recalibration of Urban Renewal Era  
Policy

APA-IL CMS Finding the Middle:  
Inclusive by Design

APA-IL State Conference:  
Zoning to Balance Gentrification, Preservation,  
and Investment

APA Quad State Conference:  
Economic Argument for Flexible Parking  
Requirements

# Jackie Wells AICP

## Practice Lead

Jackie is a Practice Lead at Houseal Lavigne where she is focused on working with municipalities to develop actionable plans that reflect the vision and goals of the community and to update their zoning, sign, and subdivision ordinances to ensure they are useful tools in plan implementation. Her experience with both planning and zoning grounds all her work in the realities of the market and effectively balances community aspirations with what it takes to get good development done.

Jackie received her Bachelor's degree in architectural studies and Master's degree in Urban Planning from the University of Kansas. While in school her passion for community engagement was ignited, leading to her award of a research grant to further study the geospatial impacts of public engagement preferences.

Prior to joining Houseal Lavigne, Jackie was the Housing and Development Planning Specialist for a community of approximately 45,000. There she developed, implemented, and monitored the City's five-year Consolidated Plan and Annual Plans; applied for, received, and administered local, state and federal grant funding; acted as a liaison between the City and local community groups; spearheaded the City's targeted efforts in two historically disadvantaged neighborhoods; and planned and facilitated community engagement campaigns and events. Through these responsibilities, she gained valuable experience in program and policy development, engaging community groups, and supporting the establishment of new neighborhood associations. Jackie uses her experience in local government to develop data-driven solutions that manage the needs of elected and appointed officials, department heads, non-profit partners, and residents of the community.

## Project Experience

### Land Development Regulations

- Ardmore, OK - UDC
- Bloomington, IL - Zoning Ordinance
- Bloomington, IL - R-3B Zoning District Analysis
- Bloomington, IL - Sign Ordinance
- Cañon City, CO - UDC
- Carol Stream, IL - UDO
- Cary, IL - UDO
- Hainesville, IL - Zoning Ordinance Update and Retainer Services
- Jackson, TN - UDO
- Jenks, OK - UDO
- Knightdale, NC - UDO
- Marion, IA - Zoning Code Update
- Oak Creek, WI - Zoning and Sign Ordinance
- River Forest, IL - Sign Ordinance
- Roscoe, IL - Zoning / Regulatory Controls
- Springfield, MO - Grant Avenue Parkway District
- Sunset Hills, MO - Zoning / Regulatory Controls
- Verona, WI - Zoning and Sign Ordinance
- Yorkville, IL - UDO
- Homewood, IL - Zoning Ordinance
- Willowbrook, IL - UDO
- Franklin, WI - UDO
- Fremont, NE - UDC
- Ferguson, MO - UDO
- Kenilworth, IL - Planning Services

### Comprehensive & Master Planning

- Bensenville, IL - Parks & Recreation Master Plan
- Cañon City, CO - Comprehensive Plan
- Elk River, MN - Comprehensive Plan
- Jenks, OK - Comprehensive Plan
- Oak Creek, WI - Comprehensive Plan
- Northfield, IL - Comprehensive Plan
- Fairfield, CT - Strategic Plan
- Greenwich, CT - Comprehensive Plan
- Sioux City, IA - Comprehensive Plan
- Eden Prairie, MN - Comprehensive Plan
- Marion, IA - Comprehensive Plan Update
- Riverside, CA - Housing Element
- Hillsborough, CA - Housing Element
- Lenexa, KS - Comprehensive Plan
- South Barrington, IL - Comprehensive Plan
- Riverside, CA - Housing Element
- Hillsborough, CA - Housing Element
- Lenexa, KS - Comprehensive Plan
- South Barrington, IL - Comprehensive Plan

### Corridor, Downtown & Small Area Planning

- Hastings, MN - Vermilion Street Corridor Plan
- Lawrence, KS - Downtown Master Plan
- Plainfield/Joliet, IL - Boulevard Place PUD Design Guidelines
- Springfield, MO - Grant Avenue Parkway Corridor Plan
- Holly Springs, NC - Interchange Master Plan
- Hancock County, IN - Buck Creek PUD Entitlement Process

*\*Work conducted at other firms*

## Education

Master of Urban Planning and Policy  
University of Illinois at Chicago

Bachelor Of Arts In Sociology and English,  
Trinity Christian College

## Memberships

American Planning Association (APA)

## Certifications

American Institute of Certified Planners (AICP)

## Awards

2022 APA-CO General Planning Award (Merit)  
Picture Cañon City Comprehensive Plan

2021 APA-CO General Planning Award  
Gunnison 2030 Comprehensive Plan

# Josh Koonce AICP

## Senior Planner

Josh is a Senior Planner with Houseal Lavigne who brings experience in the areas of zoning, mapping, historic preservation, community development, and bicycle planning. His approach to any assignment is anchored by data-driven plan communication, a people-oriented approach to transportation, and the integration of technology and visuals in the planning process.

Before joining Houseal Lavigne, Josh worked as the sole staff planner and zoning coordinator for the Village of Maywood, a suburban Chicago community of 23,000 residents. In that capacity, he served as the staff liaison for the environmental beautification committee, the historic preservation commission, and the plan commission/zoning board. Josh interacted daily with Village officials, residents, developers, architects, and engineers, conducting zoning and development review for projects ranging from residential homeowner improvements to large mixed-use and industrial developments. Josh also handled all GIS mapmaking and data management tasks for the Community Development Department.

Josh adeptly engages and interfaces with a community and its committees, boards, and commissions. He brings a fresh, outside perspective coupled with an inside, practical understanding of municipal government structures. He has frequently acted as a liaison between these types of entities and local community development organizations and coalitions to connect, build relationships, and advocate and defend the vision of any given assignment.

An additional benefit of his experience is a thorough understanding of the research and procedures necessary to secure planning-related grant monies at the local level. As the planner for the Village of Maywood, Josh applied for and received over \$1 million in planning and engineering grant funds, which increased the capacity for implementation of planning initiatives within the community.

Josh is a certified planner with the American Institute of Certified Planners and an active APA member, enabling him to network with planning professionals and stay up-to-date with planning best practices. Going forward, Josh is interested in helping communities navigate and prepare for a variety of scenarios by finding creative and thoughtful ways to plan and benefit from local assets.

## Project Experience

### Comprehensive Plans

- Cañon City, CO
- Commerce City, CO
- Fort Wayne & Allen County, IN
- Grand Junction, CO
- Gunnison, CO
- Jenks, OK
- Peoria Heights, IL
- Opelika, AL
- Claremont, CA
- Munster, IN
- Milliken, CO
- Clarksville-Montgomery County, TN

### Zoning Ordinances

- Cañon City, CO
- Jenks, OK
- Knightdale, NC
- Verona, WI

### Downtown Plan

- St. Joseph, MI

### Economic Development

- Brownsburg, IN Economic Development Strategic Plan

### Corridor Plans

- Jefferson-Chalmers Mainstreet Master Plan, Detroit, MI

### Misc. Studies

- MWRD Stormwater Master Plan

### Subarea Plans

- Diamond Willow Property Master Plan, Sioux City, IA
- Grand Junction, CO
- Gunnison, CO
- Jenks, OK
- Oshkosh, WI, Sawdust District Master Plan
- Peoria Heights, IL

### Development Services

- Flossmoor, IL

### Grant Writing\*

*Secured and managed the following grant funds or grant-funded projects:*

- IHDA abandoned properties grant funding
- Invest in Cook County funding for a major Village roadway project
- Local Technical Assistance funding for a Metra Station Area plan (RTA)
- Local Technical Assistance for updated zoning ordinance public facing guide (CMAP)
- MWRD Green Infrastructure Grant

*\*Work conducted at other firms*



## Education

Masters of Urban Planning and Policy  
with a Certificate in Geospatial  
Analysis & Visualization  
University of Illinois at Chicago

Bachelor of Science in Architecture,  
University of Illinois at Champaign-Urbana

## Memberships

American Planning Association (APA)

IL GIS Association

## Certifications

American Institute of Certified Planners (AICP)

ArcGIS Desktop Associate,  
Issued by Esri

ArcGIS Desktop Professional,  
Issued by Esri

## Presentations

Wisconsin Land Information Association:  
Persuading Citizens & Corporations  
with Visualization

## Awards

2022 APA-CO General Planning Award (Honors)  
Your El Paso Master Plan

2022 APA-CO General Planning Award (Merit)  
Picture Cañon City Comprehensive Plan

2021 APA-CO General Planning Award  
Gunnison 2030 Comprehensive Plan

2018 Special Achievement in GIS Award,  
Oshkosh Lakeshore Development

# Trisha Parks AICP

## Senior Planner

Trisha is a Senior Planner with Houseal Lavigne and is instrumental in executing and evolving the firm's distinctive style and transformative 3D and GIS-based visualizations. Her primary area of expertise is visual communication through the development of illustrative maps, graphics, 3D visualizations, plan branding collateral, and plan document layouts.

Trisha received a Bachelor's degree in Architecture from the University of Illinois at Urbana-Champaign and a Master's degree in Urban Planning and Policy from the University of Illinois at Chicago, concentrating in spatial planning and urban design. While attending University, she was awarded the AICP Outstanding Student Award honoring her exceptional achievements in the study of planning. Prior to joining Houseal Lavigne, Trisha worked for the City of Highland Park. Throughout her time with the City, she worked on projects such as the Highland Park Downtown Design Guidelines and the Cultural Arts Master Plan.

Across a wide breadth of scales, Trisha brings specialization in all planning and design platforms, including but not limited to ArcGIS, ArcGIS Pro, Adobe, SketchUp, and CityEngine, to forge the connection between the planning process and the final deliverable. Her ability to design engaging and easy-to-understand graphics and collateral greatly assist the firm throughout the planning and outreach processes. Though she largely concentrates on the graphic representation of planning policies, she is interested in all aspects of the planning process.

## Project Experience

### Comprehensive Plans

- Aurora, CO
- Ardmore, OK
- Battle Creek, MI
- Bentonville, AR
- Brentwood, MO
- Brownsburg, IN
- Cañon City, CO
- Cape Cod, MA
- Channahon, IL
- Eden Prairie, MN
- El Paso County, CO
- Fayette County, WV
- Fort Lupton, CO
- Downers Grove, IL
- Galesburg, IL
- Glen Ellyn, IL
- Grand Junction, CO
- Gunnison, CO
- Jenks, OK
- Lake Barrington, IL
- Marion, IA
- Minooka, IL
- Morrisville, NC
- Naperville, IL
- Northfield, IL
- Oak Creek, WI
- Opelika, AL
- Peoria Heights, IL
- River Forest, IL
- Schaumburg, IL
- Sioux City, IA
- Springfield, MO
- Summerville, SC
- Westmoreland County, PA
- Wyoming, MI

### Plan Branding

- Aurora, CO
- Cañon City, CO
- Clarksville-Montgomery County, TN
- Brentwood, MO
- Fayette County, WV
- Fort Lupton, CO
- Fort Wayne, IN
- Jenks, OK
- New Buffalo, MI
- Westmoreland County, PA

### Downtown Plans

- Lisle, IL
- Oshkosh, WI
- Springfield, MO
- St. Joseph, MI

### Site Visualizations

- Ames, IA
- Battle Creek, MI
- Bentonville, AR
- Channahon, IL
- Diamond Willow Property, Sioux City, IA
- Elmhurst, IL
- Fort Lupton, CO
- Frederick, CO
- Gunnison, CO
- Hastings, MN
- Oshkosh, WI
- Norwegian American Hospital Health District Master Plan
- Peoria Heights, IL
- St. Cloud, MN
- Savoy, IL

### Subarea Plans

- Huntley, IL
- Elmhurst, IL
- Peoria Heights, IL
- Oshkosh, WI
- Holly Springs, NC

### Corridor Plans

- Ames, IA
- Bradley, IL
- Hastings, MN
- Oak Brook, IL

### Zoning Ordinances

- Bentonville, AR
- Bloomington, IL
- Cary, IL
- Marion, IA
- Roscoe, IL
- Sunset Hills, MO

### Parks & Recreation Plans

- Bensenville, IL
- Fort Lupton, CO
- St. Cloud, MN

## Education

Master of Urban Design,  
Carnegie Mellon University

Bachelor of Architecture,  
Purbhanchal University

## Memberships

American Planning Association (APA)

## Presentations/Exhibitions

"An Atlas of Commoning", Miller Institute of  
Contemporary Art, Carnegie Mellon University,  
2019

ICEE PDRP, "Urban Regeneration of Taulachlon  
Tole, Bhaktapur", 2016

ICEE PDRP, "Perception of Residents on  
Housing Alternatives in the 2015 Gorkha Earth-  
quake Post-Disaster Reconstruction", 2016

# Sujan Shrestha LEED GA Planner II

Sujan joined Houseal Lavigne in 2019 after receiving his Master of Urban Design from Carnegie Mellon University. As a Planner with the firm, Sujan collaborates with associate planners and project managers to develop meaningful illustrations and visualize data and urban policies across a range of community plans and project scales. Sujan's proficiency in the latest GIS and graphic tools available to planners allows him to incorporate compelling visualizations and efficient workflows into the planning process.

While at Carnegie Mellon University, Sujan worked as a Data Visualization Research Assistant for the School of Architecture's Remaking Cities Institute, which conducts research in placemaking, public participation processes, and sustainable development. His work included participation on the study "3D/ Data Visualization for Urban Design and Planning." A collaborative research with the City of Pittsburgh's Department of City Planning. His primarily role focused on developing comprehensive workflows that would aid planners and designers adopt the appropriate tools to perform a range of tasks valuable to city planning, urban design, and community engagement. Further, his keen interest in community engagement and tactical urbanism led to an independent study focused on developing agency among members of a community to achieve equitable development.

Prior to his studies at Carnegie Mellon, Sujan worked as an architectural designer and project lead for over 4 years on public and private sector projects in Nepal. His professional practice includes building design, site planning and landscape design for various residential, institutional, healthcare and pharmaceutical projects. He also held an adjunct faculty position at Khwopa Engineering College's Department of Architecture, where he helped students research and document historic built environments. Other past experiences includes extensive research and presentations on post-disaster reconstruction of historic cities in Nepal.

## Project Experience

### Comprehensive Plans

- Fort Wayne/Allen County, IN
- Glen Ellyn, IL
- Grand Junction, CO
- Gunnison, CO
- Jenks, OK
- Naperville, IL
- Northfield, IL
- Oak Creek, WI
- Springfield, MO
- Summerville, SC
- Wyoming, MI

### Subarea Plans

- Palos Park, IL - Western Growth Area Plan

### Development Services

- Norwegian American Hospital, Chicago, IL
- Naperville, IL Entitlement Fee Study
- St. Joseph, MI - Berrien Hills Development Master Plan
- River Forest, IL - Madison Street Development Concepts

### Corridor Plans

- Detroit, MI - Jefferson Chalmers Mainstreet Master Plan
- Aurora, IL - Farnsworth Corridor Plan

### Zoning Ordinances

- Bloomington, IL
- Carol Stream, IL
- Knightdale, NC
- Oak Creek, WI
- Sunset Hills, MO
- Verona, WI
- Yorkville, IL



## Education

Master of Urban and Regional Planning,  
The University of Michigan

Bachelor of Science in Geography,  
Central Michigan University

## Memberships

American Planning Association (APA)

# Ruben Shell AICP

## Planner II

Ruben is a Planner II with Houseal Lavigne, where his primary focus is updating and rewriting zoning, sign, and subdivision ordinances to feature user-friendly layouts, align with community planning efforts, and streamline development processes. Ruben also assists in the development of comprehensive plans, corridor plans, downtown plans, and other land use planning projects, providing him with a keen understanding of the intersection of policy and regulation.

He comes to Houseal Lavigne after working for two years as a planner in northwest Michigan. In this capacity, he provided planner of record advisory services and zoning administrator services to cities, counties, and townships throughout the region. This experience helped him gain a hands-on understanding of the ways in which zoning provisions and development process requirements interface with private development. He also helped communities update their zoning ordinances to promote affordable housing, renewable energy, agricultural tourism, and administrative site plan review procedures. Ruben also contributed to and led several comprehensive plans that addressed coastal resiliency, the seasonal tourism economy, and affordable housing options.

Ruben received a Bachelor's degree in geography from Central Michigan University and a Master of Urban and Regional Planning degree from the University of Michigan. While studying, he cultivated strong interests in transportation and land use planning, and zoning and development process approaches that support the local economy.

## Project Experience

### Development Advisory Services

- Banks Township, MI - Planning Services & Zoning Updates\*
- Burt Township, MI - Planning Services & Zoning Updates\*
- Little Traverse Township, MI - Planning Services & Zoning Updates\*
- Emmet County, MI - Planning Services & Zoning Updates\*
- Norwood Township, MI - Planning Services & Zoning Updates\*
- Resort Township, MI - Zoning Administrator Services\*
- Pleasantview Township, MI - Zoning Administrator Services\*
- Kenilworth, IL - Planning Services

### Comprehensive Plans

- Iron Mountain, MI - Comprehensive Plan\*
- Roseville, MI - Comprehensive Plan Update\*
- East Jordan, MI - Comprehensive Plan Update\*
- Hudson Township, MI - Comprehensive Plan\*
- Charter Township of Filer - Comprehensive Plan Update\*
- Project Rising Tide Round Two - Comprehensive Plan Update for 12 Michigan Communities\*
- Warren, MI - Comprehensive Plan\*
- Lincoln Park, MI - Master Plan\*

### Land Development Regulations

- Cañon City, CO - UDC
- Jenks, OK - UDO
- Knightdale, NC - UDO
- New Buffalo Township, MI - Zoning Ordinance Rewrite\*
- Yorkville, IL - UDO
- Sunset Hills, MO - UDO
- Homewood, IL - Zoning Ordinance
- Willowbrook, IL - UDO
- Franklin, WI - UDO
- Fremont, NE - UDC
- Ferguson, MO - UDO

### Subarea Plans & Special Projects

- East Jordan, MI - EJ Ironworks Site Community Design Charter\*
- Charlevoix County, MI - Parks and Recreation Plan\*
- Boyne City, MI - Parks and Recreation Plan\*
- Boyne City, MI - Avalanche Preserve and Waterfront Open Space Design\*

*\*Work conducted at other firms*





SECTION 3

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# **RECENT PROJECT EXAMPLES AND REFERENCES**





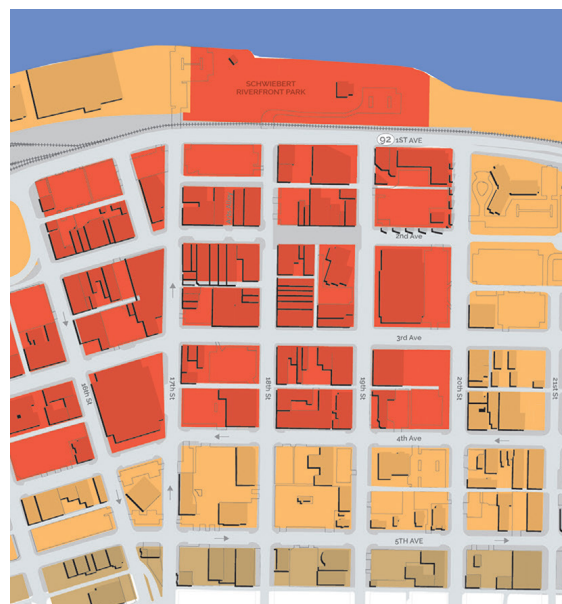
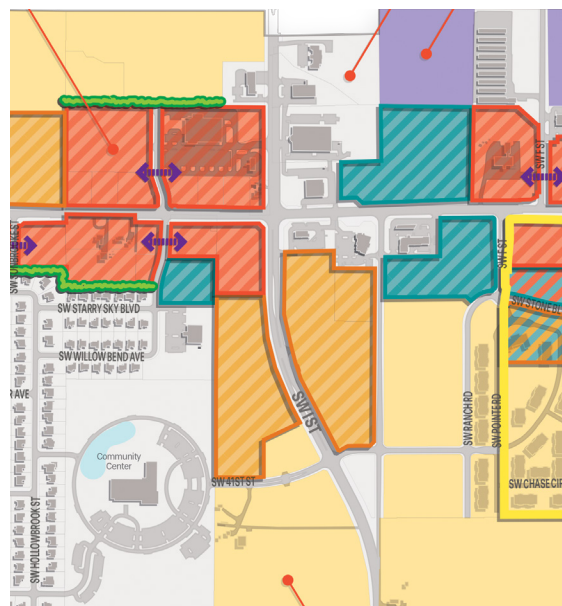
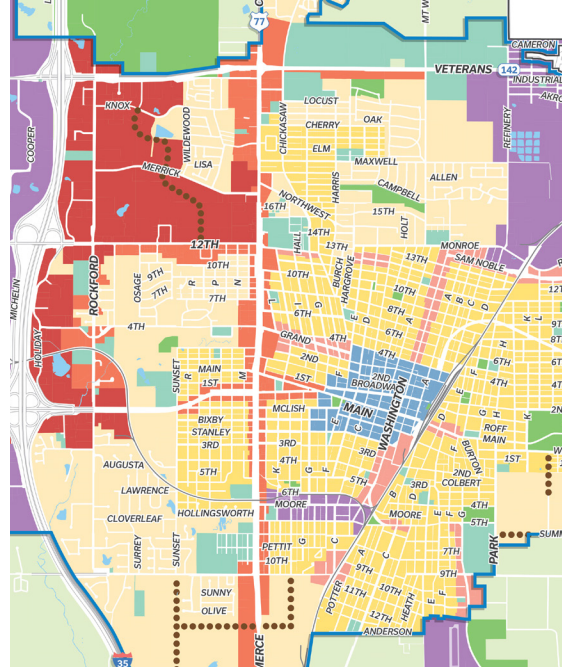
# Project Experience

**Houseal Lavigne** has established itself as one of the top planning firms in the United States. The firm strengthens communities through creative, dynamic, and viable approaches to planning, design, and development. By creating a clear and practical unifying vision, developing achievable and implementable plans and concepts, fostering innovative community involvement programs that reach a broad cross-section of stakeholders, crafting sustainable growth and resilient economic development strategies; our team provides the expertise necessary to improve the relationship between people and their environment.

Houseal Lavigne has worked with more than 450 communities across the country and developed over 200 comprehensive plans. We are well-positioned to deliver a Plan that is clear, concise, user-friendly, easy to administer, and responsive to community issues, opportunities, and aspirations. Below is a list of similar projects we have completed:

## Comprehensive Experience

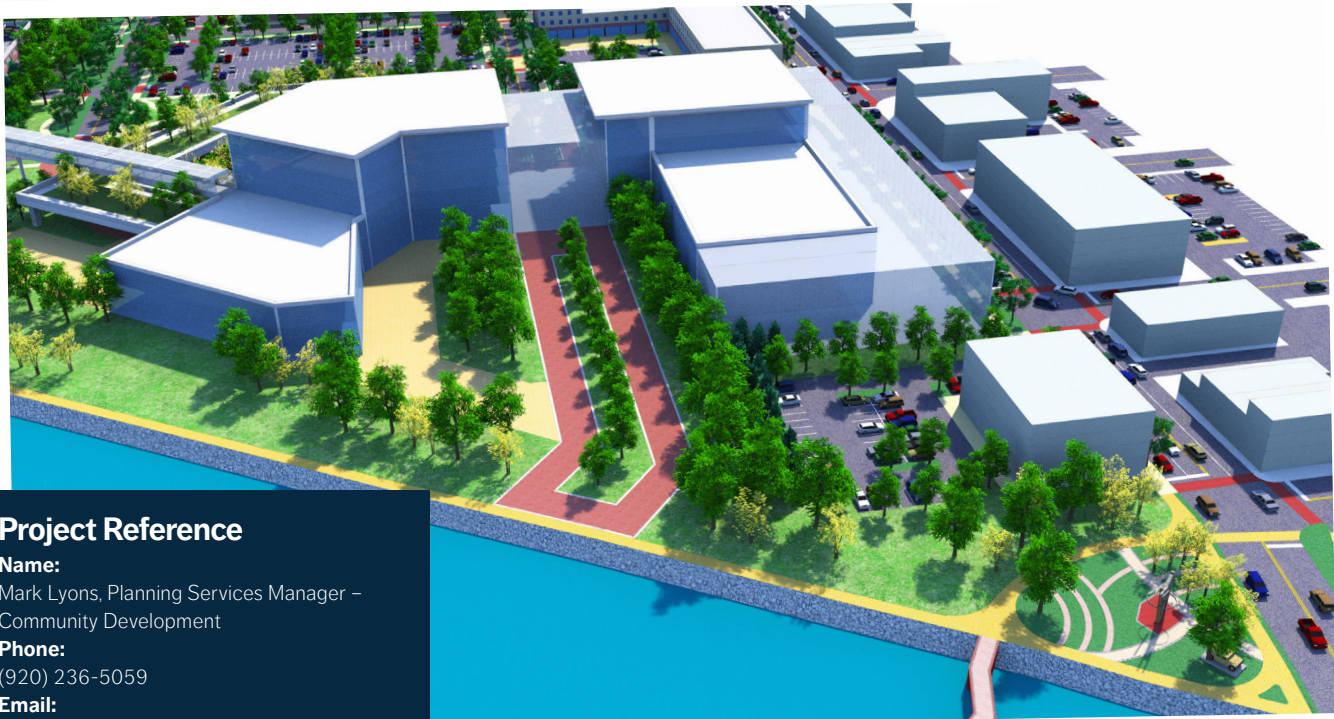
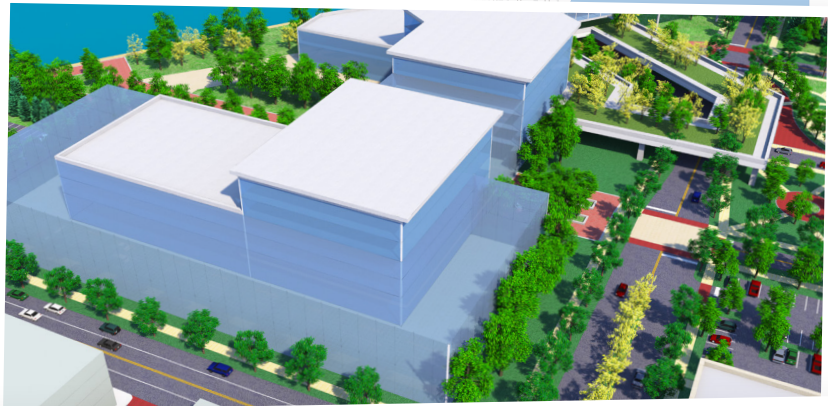
- Ardmore, OK
- Aurora, CO
- Battle Creek, MI
- Bentonville, AR
- Brentwood, MO
- Benton Harbor, MI
- Brownsburg, IN
- Bristol, VA
- Cape Code, MA
- Carpentersville, IL
- Cary, IL
- Coralville, IA
- Council Bluffs, IA
- Countryside, IL
- Crestwood, MO
- Crothersville, IN
- Culver, IN
- Downers Grove, IL
- Eden Prairie, MN
- Edinburgh, IN
- Elgin, IL
- El Paso County, CO
- Fairview Heights, IL
- Flint, MI
- Forest Park, IL
- Fort Dodge, IA
- Fort Lupton, CO
- Frederick, CO
- Freeport, IL
- Galesburg, IL
- Gardner, KS
- Geneva, IL
- Glen Ellyn, IL
- Grand Junction, CO
- Greenwich, CT
- Gunnison, CO
- Hudson, OH
- Itasca, IL
- Jackson, MO
- Jackson, TN
- Jenks, OK
- Kenilworth, IL
- Marion, IA
- Maywood, IL
- Mundelein, IL
- Muskogee, OK
- New Buffalo, MI
- North Aurora, IL
- Niles, IL
- Northfield, IL
- Oakbrook Terrace, IL
- Oak Creek, WI
- Oak Park, IL
- Palos Heights, IL
- Peoria Heights, IL
- Pingree Grove, IL
- Pleasant Hill, IA
- Plainfield, IN
- Richton Park, IL
- River Forest, IL
- Schaumburg, IL
- Sioux City, IA
- St. Charles, IL
- St. Cloud, MN
- Summerville, SC
- Tipton, IN
- Tipton County, IN
- University City, MO
- Westmont, IL
- Windsor, CO
- Wyoming, MI



City of Oshkosh, Wisconsin

## Oshkosh Downtown Plan

Imagine Oshkosh is the Center City Investment Strategy for Downtown Oshkosh and the surrounding areas. The Plan organized this waterfront Downtown into ten distinct functional areas, establishing a unique character, design guidelines, development priorities, and strategies for each. Waterfront access was prioritized, as was the preservation and celebration of historic and architecturally significant building stock, while aggressively targeting the area for new residential and mixed use infill development. As part of the planning effort, **Houseal Lavigne** reimagined a vacant old industrial waterfront site to help the city respond to “long shot” Milwaukee Bucks opportunity. By crafting a redevelopment plan for the Sawdust District, a multi-use entertainment district concept, the City was able to make the “long shot” a reality, and the City landed the professional basketball team facility. The redevelopment plan included a basketball team practice facility, a larger arena, and a 250,000-square foot office building. Part of the goal was to land jobs close to lifestyle amenities, a pattern typically only seen in larger communities.



### Project Reference

**Name:**

Mark Lyons, Planning Services Manager –  
Community Development

**Phone:**

(920) 236-5059

**Email:**

mlyons@ci.oshkosh.wi.us



# Oshkosh, Wisconsin Sawdust District Master Plan

The Sawdust District is nestled in the heart of Oshkosh at the confluence of the Fox River and Lake Winnebago. The District is comprised of a collection of neighborhoods in the historic core of the community and was once home to thriving industrial businesses. Today, visitors come to enjoy waterfront amenities and to experience the energetic excitement that surrounds Menominee Nation Arena.

The City of Oshkosh tasked Houseal Lavigne with following up on the success of the Imagine Oshkosh Master Plan and providing a detailed look at the priority district.

The resulting Sawdust District Master Plan is graphically rich, designed to help the community visualize a regional destination with an eclectic mix of businesses, entertainment venues, and residential opportunities. Recommendations for desired land uses, design and development, transportation, and placemaking tie into the District's six functional subareas. The plan offers a framework for the City that will facilitate implementation and guide development for years to come, ensuring that the Sawdust District will increase its reputation for public use and enjoyment.



## Sawdust District Redevelopment Plan

CONCEPTUAL VISUALIZATION

1. Pedestrian and bike access along existing bridge and an under pass connecting the riverwalk.
2. Gateway feature and plaza space announcing the entrance into the Sawdust District.
3. Office or mixed use building.
4. Single-family attached.
5. Public plaza and open space.
6. Mixed use infill development along South Main Street.
7. Mixed use development (commercial and restaurants uses on the ground floor with office and residential uses on the upper floors).
8. Office or mixed use building.
9. Mixed use development (commercial and entertainment uses on the ground floor with office and residential uses on the upper floors).
10. Parking for mixed use development along South Main Street.
11. Parking deck for office or mixed use (3 levels).
12. Riverwalk.
13. Multi-family development.
14. 9th Avenue extension/connection.
15. Trailhead and parking.
16. Pedestrian bridge.
17. Multi-family development.
18. Hotel / resort.
19. Pioneer plaza and gathering area.
20. Existing marina, boat storage, and boat docks.
21. Multi-family development.
22. Trails, open space, and berm buffering existing railroad.
23. Arena.
24. South Main Street roadway improvements (using expanded right-of-way).
25. Adjacent residential neighborhood.
26. Commercial infill development along South Main Street.
27. South Main Street roadway improvements (using current right-of-way).
28. Commercial infill development along South Main Street.
29. Multi-family development.
30. Multi-family development.
31. Single-family attached.

### Project Reference

#### Name:

Mark Lyons, Planning Services Manager – Community Development

#### Phone:

(920) 236-5059

#### Email:

mlyons@ci.oshkosh.wi.us



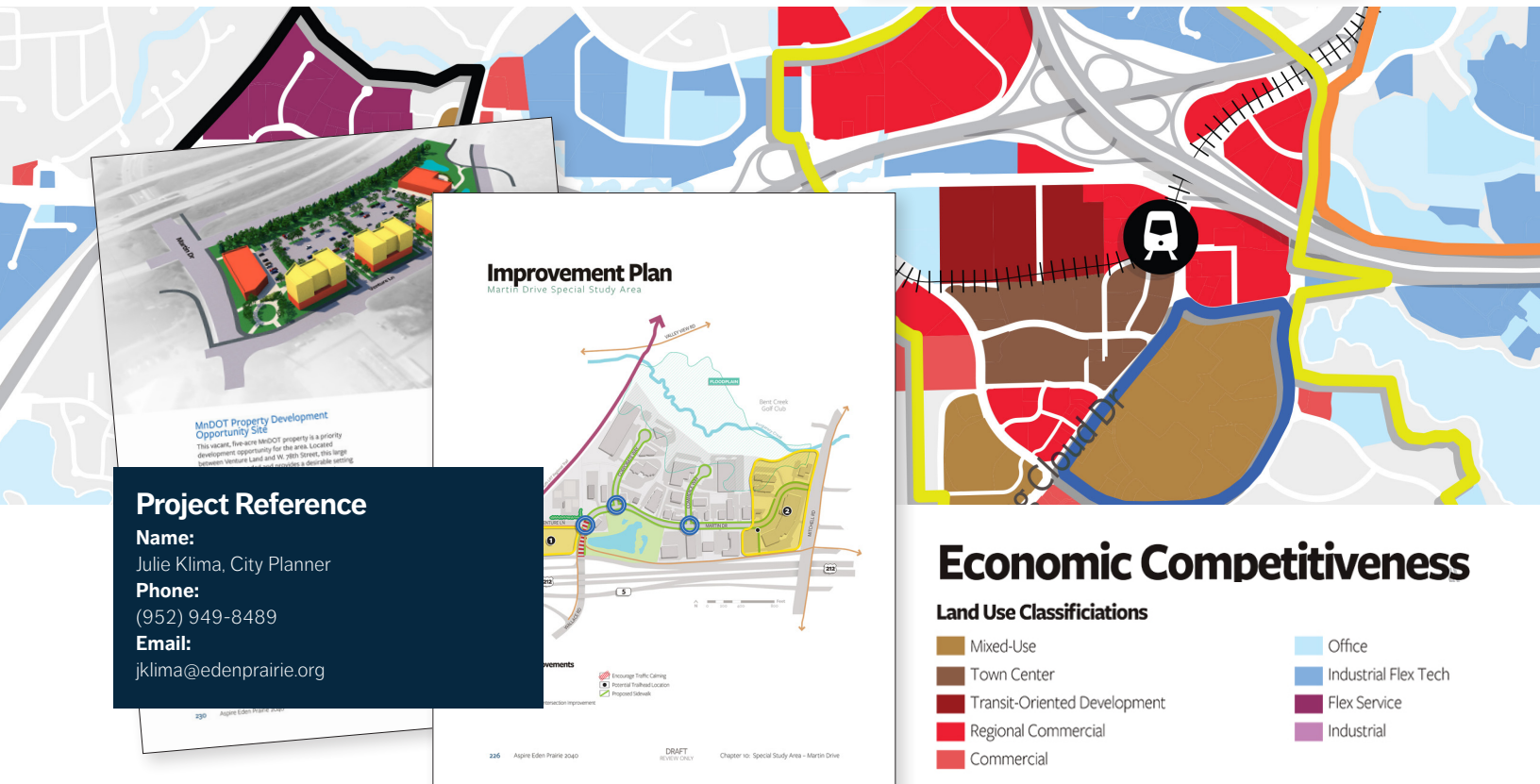
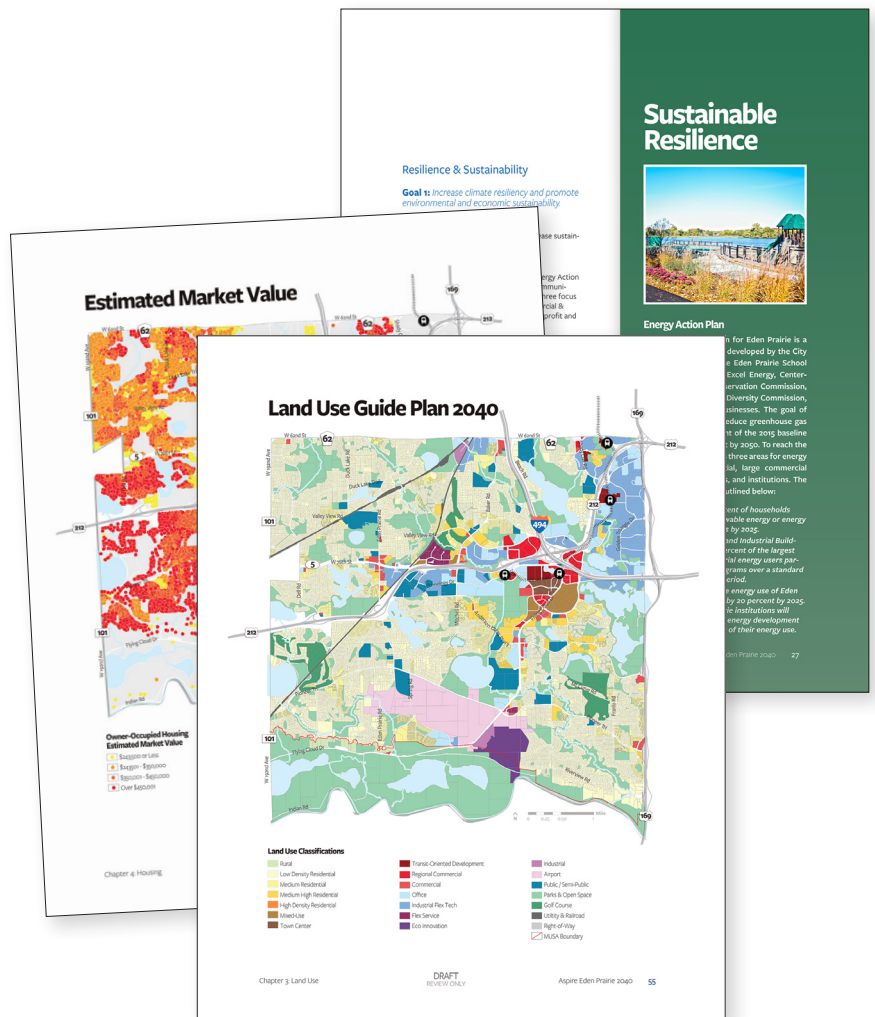


City of Eden Prairie, Minnesota

## Comprehensive Plan “Aspire Eden Prairie 2040”

In January 2017, **Houseal Lavigne** and the City of Eden Prairie initiated a process to update its Comprehensive Plan. Branded as Aspire Eden Prairie 2040, the Plan acts as Eden Prairie’s primary policy guide for growth and development over the next 20 years.

Personalized and topic-focused outreach and community-wide stakeholder involvement was integral to the Plan. The strategic outreach efforts included interactive online community engagement, online and in-person community issues mapping, in-person interviews and focus-group meetings to discuss specific topics, Do-It-Yourself (DIY) workshop packets, which allowed residents to conduct community workshops within their organization and neighborhoods, and much more. In addition, the Plan integrates the concepts of community health, equity and diversity, sustainability and resilience, and historic preservation into both its Comprehensive Plan, and in greater detail, its Special Study Area Plans. Best practices on these topics drove the Plan’s development, while identifying recommendations that further enhance the City’s natural setting and environmental assets, protecting the community’s character, health, and wellbeing, welcoming and celebrating diversity, promoting equity, and furthering sustainability and resilience.





## City of Elk River, Minnesota Elk River Comprehensive Plan

Elk River is the seat of Sherburne County, located 34 miles northwest of Minneapolis/St. Paul. Between 1990 and 2018 the City of Elk River saw a 54% increase in its population. Two decades into the 21st Century, Elk River is projected to continue to experience consistent population growth through 2035. To help navigate growth and development into the future the City selected **Houseal Lavigne** to update its Comprehensive Plan.

The Elk River Comprehensive Plan provides a vision for the community that applies a smart growth approach to managing development over the next 15 years in the community. The Plan provides guidance on housing reinvestment that enhances existing residential areas, emphasizes infill housing opportunities, and informs strategic conservation driven development of new residential neighborhoods. In addition, the Plan also focuses on strengthening commerce and expanding employment opportunities within the City.

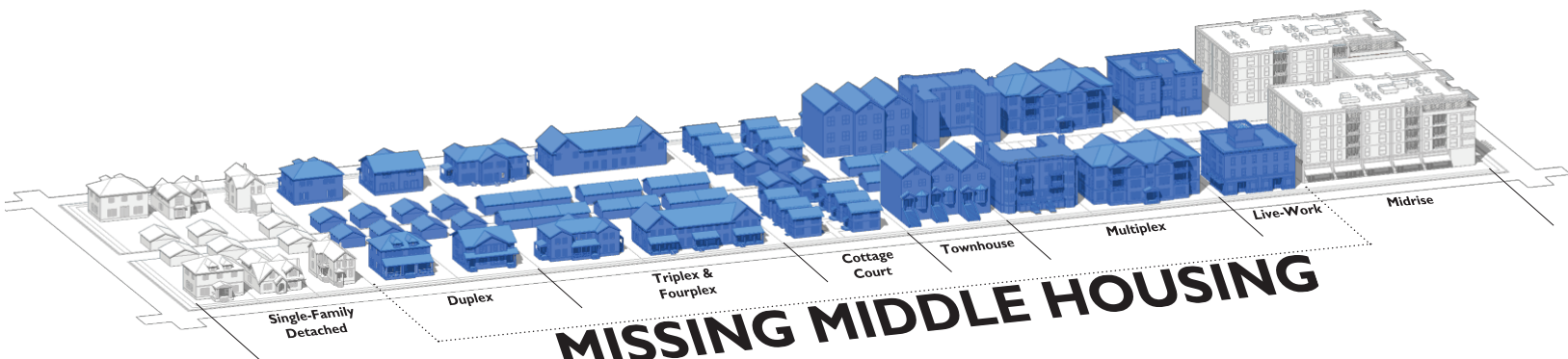
Actionable recommendations are provided throughout the Comprehensive Plan and include leveraging the City's waterfront assets, enhancing connections to outdoor recreation, and creating unique commercial options that support livability and establish Elk River as a destination along the Highway 169 corridor.

### Project Reference

**Name:**  
Zack Carlton, Planning Manager  
**Phone:**  
(763) 635-1035  
**Email:**  
zcarlton@ElkRiverMN.gov



## MISSING MIDDLE HOUSING



## City of Fort Wayne & Allen County, Indiana Comprehensive Plan

At the beginning of 2020, **Houseal Lavigne** kicked off the outreach process with Allen County and the City of Fort Wayne to support the *All In Allen Comprehensive Plan*. The new Plan will guide decision-making and set policies for growth and development for one of Indiana’s fastest-growing Counties.

A robust public engagement process was conducted for *All In Allen*, ensuring that the Plan represents the needs and desires of the community. A collaborative and flexible approach allowed the program to shift strategically with the pandemic, and public participation was exemplary. Houseal Lavigne worked closely with staff to deploy virtual meetings, workshops, focus groups, and online engagement tools, allowing people to participate actively in the planning process from home. The community was able to view presentations, ask questions, provide input, and remain actively and effectively engaged throughout the first stages of the project.

Based on the community’s feedback, *All In Allen* will support the vision and goals of Allen County, the City of Fort Wayne, and the adopting communities of Grabill, Huntertown, Monroeville, and Woodburn.

*All In Allen* is expected to be completed and adopted in Spring 2022.



**397**  
In-Person Participants



**627**  
Short Survey Postcards



**38**  
Workshops Conducted



**220**  
Kick-off Event Participants



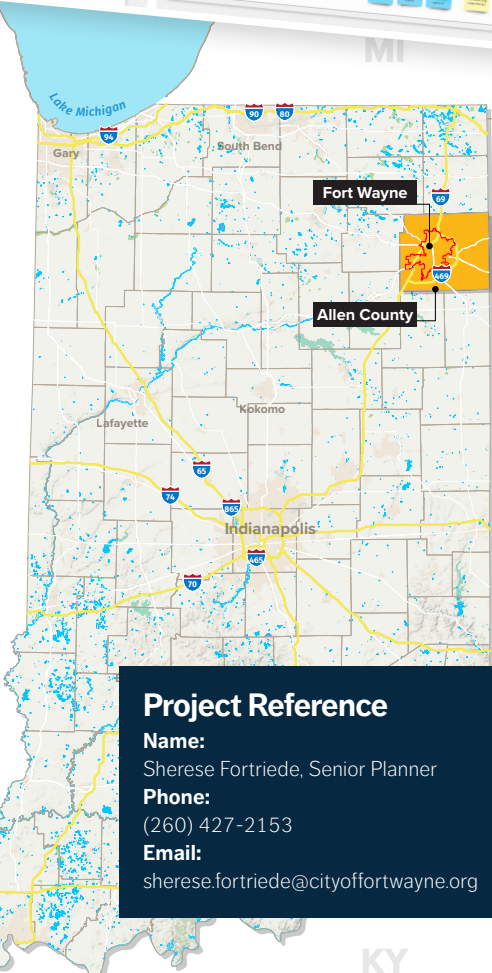
**55**  
Public Facilities Survey Participants



**1,603**  
Online Survey Participants



**325**  
map.social  
Features Created



### Project Reference

**Name:**  
Sherese Fortriede, Senior Planner  
**Phone:**  
(260) 427-2153  
**Email:**  
sherese.fortriede@cityoffortwayne.org

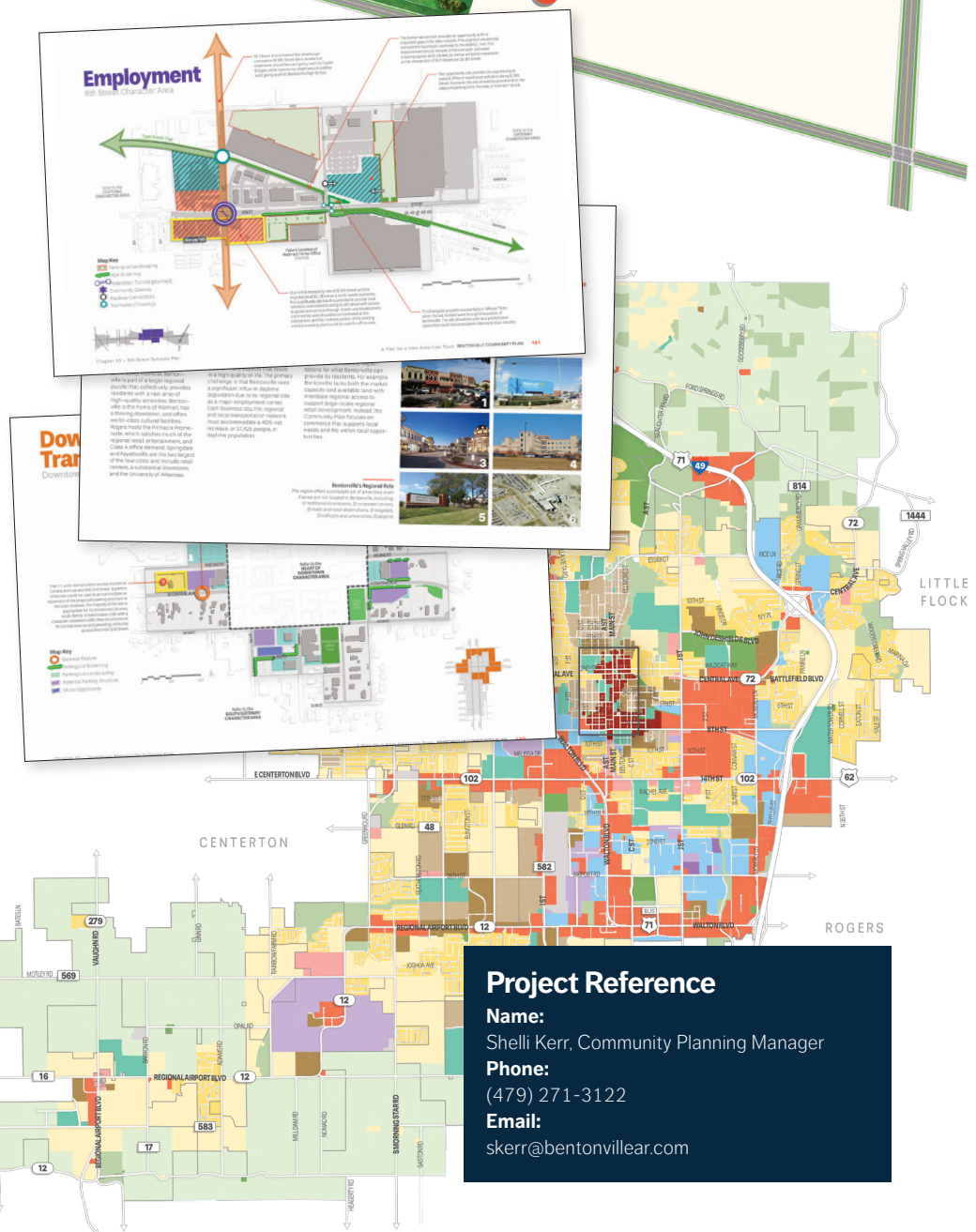




## City of Bentonville, Arkansas Comprehensive Plan

The Bentonville Community Plan, developed by **Houseal Lavigne**, is the City's guidebook for becoming the model of a new American town. In 1950 Bentonville became the hometown of the original Walton's 5&10 with its small-town, middle-America charm. Since the opening of the first store Walton's has grown into the global retail chain, Walmart, and Bentonville has grown right along with it. The City has experienced an exponential population flux since 2000 that is expected to continue well into the 2030s. The Community Plan focuses on directing that growth in a manner that benefits the existing residents as businesses as well as the newcomers, all while maintaining its historical, and eclectic charm.

To do so, a Strategic Growth Plan was utilized to inform where and how the influx of new people and proprietors should locate into the expanding City. It identifies short- and long-term decisions that account for a multitude of factors including transportation and infrastructure access, municipal service locations, quality of life amenities, and costs for the City. This calculated planning approach helps Bentonville take advantage of existing resources while identifying and utilizing new opportunities to further its recent cultural, economic, and environmental successes.





## Cañon City, Colorado

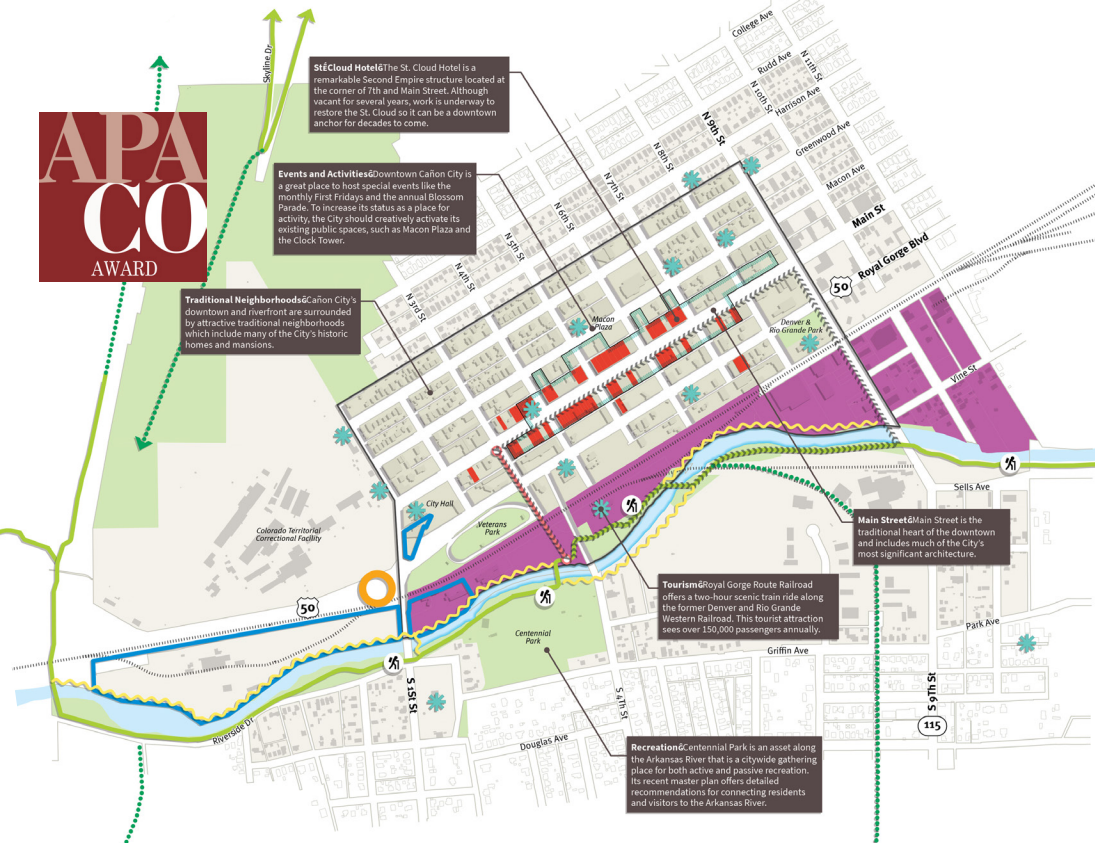
### Picture Cañon City 2040

Cañon City is the county seat for Fremont County and is known as the center of Colorado's Royal Gorge Region. As the City approached its 150th birthday, it selected Houseal Lavigne to create a new Comprehensive Plan and Unified Development Code (UDC).

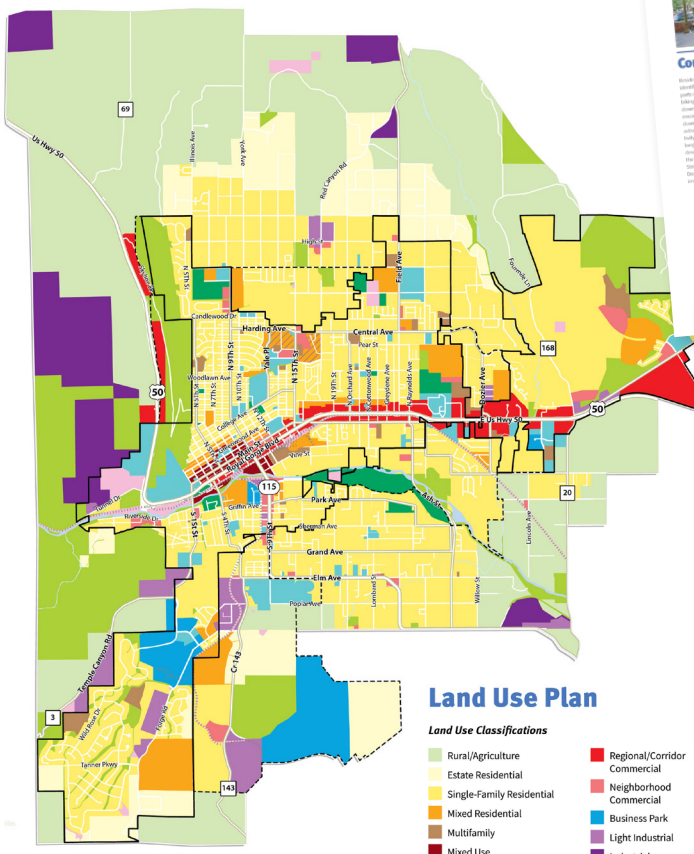
Picture Cañon City 2040 provides a vision for the community that embraces the City's historic Main Street and emphasizes its abundance of natural assets, including the Arkansas River that flows through the City center and the Hogback Open Space Recreation Area.

Actionable recommendations throughout the plan are anchored by guiding principles, including prioritizing compact and contiguous development, building a livable community, celebrating unique identity, ensuring a stable economy, and becoming the nexus of recreational opportunities.

Picture Cañon City 2040 sets the stage for cohesive implementation of the plan in alignment with clear regulations in the UDC. The City's tandem of new planning and development regulation is up to the challenge of helping Cañon City prepare as it kicks off the next 150 years.



## Framework Area Policies and Recommendations







SECTION 4

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# **PROJECT UNDERSTANDING AND SCOPE OF WORK**

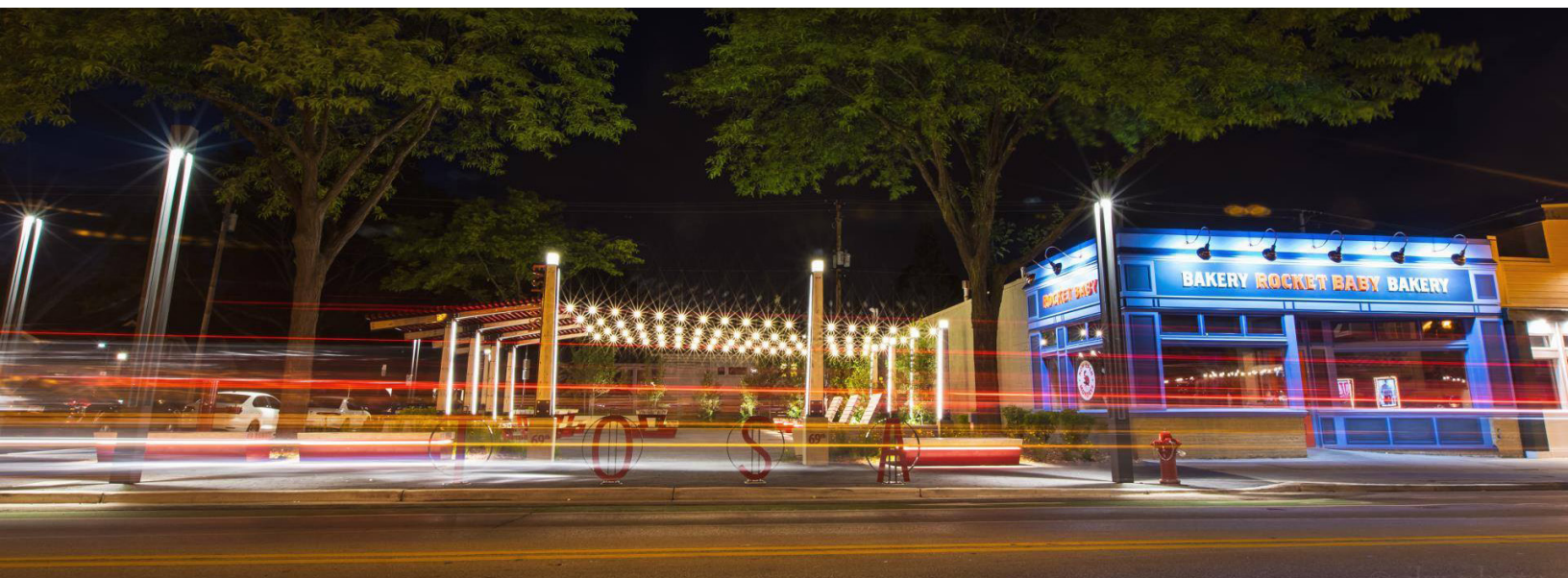




# Project Understanding

This is an exciting time for Wauwatosa – the City is stable and prosperous, with a bustling population of 48,387 that more than doubles during the daytime with incoming workers. Located just seven miles west of Milwaukee, the City is a land-locked community that continues to experience growth via redevelopment projects. With many 19th and 20th-century Victorian-style buildings, Wauwatosa has been known as the "City of homes" and is comprised of a unique mix of housing ranging from modest bungalows and apartments to high-end single-family homes. The City is home to a highly-rated school system, a unique mix of shopping and dining opportunities including the shops and restaurants on North Avenue and in the Wauwatosa Village, and over 180 stores and restaurants at the State's largest regional shopping center, Mayfair Mall. The City is a center for regional employment, home to the Milwaukee Regional Medical Center, Milwaukee County Research Park, Medical College of Wisconsin, and Innovation Campus of the University of Wisconsin-Milwaukee.

As a vibrant community and major employment center, Wauwatosa has maintained its status as a desirable place to live within the region. Houseal Lavigne is excited about the prospect of working with the City to develop its new Comprehensive Plan. We understand the importance of establishing a consensus-based vision for the future and setting a clear direction for land use and development. The new Comprehensive Plan can help create a cohesive vision, framework, and implementation strategy that responds to the goals and aspirations of the whole community. Based on research into Wauwatosa's history, knowledge of current issues, and a review of past plans, we have developed some initial observations regarding issues and opportunities we believe should be addressed through the new comprehensive planning process.





**Focusing on equity and inclusion throughout the City:** Wauwatosa is committed to creating a positive environment of equity and inclusion for all – from residents to regional workers who come into the community for the day, to visitors, and City employees. The City-wide Equity and Inclusion Statement offers guiding principles for structures and programs, vibrancy, diversity, leadership, and transparency. The Comprehensive Plan process presents a unique opportunity to honor the community's history while rejecting inequity, building a strong and fair City for the future. The Comprehensive Plan should apply the City's commitment to equity and inclusion as a "lens" to the planning process, vetting the impact of each policy and recommendation against the broader goal of a community for everyone without disparity.

**Continuing to attract the next generation:** Wauwatosa is an educated community – nearly 60% of residents hold a bachelor's degree. Residents enjoy a median household income of \$90,400 – about 32% higher than the Milwaukee-Waukesha, WI Metro Area. The Comprehensive Plan should explore ways the City can continue to attract young professionals and families that add vitality to a community. Wauwatosa will need to continue its focus on the amenities and quality of life considerations as well as housing, recreation and activities, healthy and safe community environments, quality schools, and proximity to jobs. The Comprehensive Plan should examine these variables and develop strategies aimed at continuing Wauwatosa's status as a wonderful place to live, work, and put down roots.

**Incorporating detailed studies and prior planning efforts:** The North Avenue corridor is of paramount importance, bisecting the community from east to west. The East Tosa North Avenue Plan identifies strategies to support existing businesses, attract new ones, and implement streetscape and parking improvements along the eastern portion of the corridor. The MidTown North Avenue Plan focuses on improving safety in public spaces and for all modes of transportation, maintaining established neighborhood fabric, and marketing the district in the western portion of the corridor. The Comprehensive Plan can further promote viable corridor business districts that enhance the quality of life for the neighborhoods surrounding North Avenue and other key corridors. The planning process should assess, update, and incorporate the policies and recommendations from these and other studies to fully leverage local commerce, character and sense of place, institutional presence, and opportunity while minimizing the negative impacts of regional arterial rights of way and traffic.

**Supporting the City's commercial centers:** The Village of Wauwatosa is located on the banks of the Menomonee River, offering a local "urban neighborhood" atmosphere with dining, diverse shopping, galleries, and parks. The City's Village Area Plan identifies strategies for wayfinding, pedestrian safety, economic development, and public and private realm improvements. The City is also a regional retail destination, offering Mayfair Mall, one of the state's largest shopping centers. The two areas differ significantly, but each attracts visitors and residents to shop and dine in the community. The Comprehensive Plan process can ensure consistency with the community's long-term vision for these key areas, engaging the community on recent and planned projects and initiatives in and around critical commercial areas of the community.





**Providing housing for all in a desirable community:** The City's population has declined from peak levels in 1970, but housing occupancy has remained fairly stable. Over the past 20 years, the population has stabilized, and the City has experienced some growth in multi-family development. The City's Housing Needs Analysis, completed in 2016, identified positive increases in rental units under construction, in development, and in planning stages. The housing element of the Comprehensive Plan can define the community's priorities considering these trends, and assess how incomes stack up against housing costs, and whether housing gaps exist for specific population groups such as seniors. The planning process should engage the community to determine its housing preferences and desirable formats, including the balance between multifamily housing, townhomes, duplexes, and single-family residences.

**A focus on active transportation:** The City is making strides toward becoming a better place to walk and ride a bike, benefitting from its compact size and grid street layout. Paths and trails include the Hank Aaron State Trail, the Oak Leaf Trail, and paths along the Menomonee River and through the County Grounds, offering recreation and transportation connections to nearby areas for all ages and abilities. The City-wide City of Wauwatosa Bicycle and Pedestrian Facilities Plan identifies improvements that could be undertaken along major highways and streets, which present obstacles to people traveling on foot or by bike. The transportation element of the Comprehensive Plan should evaluate and incorporate the policies and recommendations of the Bicycle and Pedestrian Facilities Plan, applying a "complete streets" approach that puts the most vulnerable users (bicyclists and pedestrians) first as roads are maintained and redesigned.

**Maintaining Wauwatosa's reputation for recreation:** Access to parks and open space contribute to a high quality of life that bolsters the City's reputation as one of the most desirable communities in the Milwaukee region. The City is home to many outdoor recreation areas including Hart Park, County Grounds Park, Hoyt Park, and numerous parkways. Grounds Park is a highlight, located on one of the highest points in the County and offering stunning views of Milwaukee and the gently rolling landscape. The Comprehensive Plan should provide a framework for ensuring parks, open spaces, and protected natural environments continue to offer world-class recreation and contribute to the environmental health of the Wauwatosa community.

**Incorporating other planning initiatives:** The current Comprehensive Plan was adopted in 2008. The City maintains many other planning documents for specific areas or focused strategies. We understand that this collection of numerous documents forming the City's guiding policy is challenging for residents, stakeholders, and staff to utilize effectively. The Comprehensive Plan is a unique opportunity to review each of the City's recent planning efforts and identify where and how to incorporate or update previous plan elements. We anticipate a Comprehensive Plan that will function as the primary way to understand the community's long-term planning vision and goals, with clear and concise text supported by attractive maps and graphics that anyone can use and understand.





# Project Approach

Houseal Lavigne recognizes the importance of using the planning process to establish community consensus and foster a sense of stewardship for the creation of a new Comprehensive Plan for Wauwatosa. Our Scope of Work ensures that City staff, residents, business owners, key stakeholders, community leaders, and elected officials are engaged throughout the planning process to help establish a visionary, goal-oriented plan, and an actionable implementation strategy that will help guide Wauwatosa's future.

Our planning process is based on community engagement and bolstered by a thorough analysis of existing conditions to provide a concise and accurate assessment of the community's issues and opportunities. Our process includes the development of plan recommendations and implementation strategies that are actionable, fiscally grounded, and rooted in citizen engagement. We are well-versed in Wisconsin Statutes Sec. 66.1001 – our proposed scope of work and the final plan deliverable are designed to meet or exceed all state requirements and guidelines.

We will work closely with City staff and officials to further refine this process, ensuring that all local needs and requirements are met. Each task of our proposed scope of work is presented in detail on the following pages.

## Step 1: Project Initiation

To “kick-off” the planning process on the right foot, meetings will be conducted with City staff, the Plan Commission (as part of the Steering Committee), and the City of Wauwatosa Common Council before undertaking other community outreach activities. This approach allows the Consultant Team and the various City designated individuals to discuss roles, responsibilities, scope, and community issues and opportunities, to ensure the project gets off to a good start.

### Formation of a Comprehensive Plan Steering Committee

We recommend that Wauwatosa establish a Comprehensive Plan Steering Committee, made up of members of the Plan Commission and Alderpersons from the Common Council. The Steering Committee should serve as a community sounding board, meeting at key points along the process to discuss issues and overall planning direction and provide feedback for consideration by the full adopting bodies. Participation by members of the Plan Commission and Council on the Steering Committee will help develop champions for the plan and ensure that the process moves smoothly. Meetings will be conducted with the Steering Committee at key intervals throughout the planning process.

### 1a: Staff Coordination Call (Virtual/Remote)

The Project Team will host a web meeting/conference call with staff to confirm dates and times for the official staff kickoff and department head meetings. On this call, we will also discuss data needs and clarify any outstanding matters including the formation of a Comprehensive Plan Steering Committee. To ensure consistent communication and coordination the Project Team manager will conduct regular and “as-needed” conference calls and/or web meetings with staff throughout the planning process.

The Project Team will work with City staff to ensure that meetings in Step 1 (1d-1f) are during the same trip if they can be conducted in person, otherwise, arrangements will be made to conduct these meetings virtually on consecutive days.





### **1b: Community Education – Branding and Collateral**

As part of project initiation, this task will play a significant role in garnering support for the planning process and piquing public interest in the Comprehensive Plan as important guides to improving the quality of life throughout Wauwatosa. The graphic design and communications experts on the Project Team will use their expertise in community-based marketing to create an “identity” for the planning process as well as the plan document. We will work with City staff to provide content for the project website and support for the City’s social media.

### **1c: Data Collection**

As part of the project initiation task, the Project Team will coordinate with the City to collect a variety of datasets related to land use and development. The data collection task focuses on GIS data needs including, but not limited to parcels, building footprints, zoning districts and overlays, community facilities, parks, traffic volumes, sidewalk inventory, traffic signals, bike routes, and trails.

### **1d: Staff Kick-off Meeting and Orientation Tour of the City**

We intend to function as a unified and integrated team alongside City staff and officials. A kick-off meeting will be held with the City staff assigned to the Comprehensive Plan project. This first face-to-face meeting will allow us to 1) review the project scope of work; 2) discuss project goals, timeline, and key deliverables; 3) share information about potential issues and areas of concern; 4) review administrative procedures; and 5) clarify any outstanding matters. This meeting will conclude with a staff-led tour of the community to better understand existing conditions and the context of Wauwatosa. During this meeting, we will also confirm upcoming meetings and events.

### **1e: Department Heads Meeting**

Immediately following the Staff Kick-off Meeting, the Project Team will host a meeting with key members of each of the City’s departments. Comprehensive Plan recommendations will have bearing on a wide variety of City policies and support from all City departments will be essential to the implementation of the plan.

### **1f: Plan Commission and Common Council Project Initiation Meeting**

*Note: This meeting of the full Plan Commission and Common Council will also serve as the first steering committee meeting.*

The Project Team will facilitate an introductory roundtable discussion with the Plan Commission and Common Council at a meeting to solicit their concerns and aspirations for the community. As the community’s decision-makers, the Common Council must have a chance to communicate and discuss their issues and concerns with the Project Team, as well as each other, at the beginning of the process.

The primary purpose of this work session is to gather ideas from City officials, ensuring that the plan accurately captures the shared sentiments of the leaders of the community. This work session will provide a unique opportunity to jointly discuss the foundation of the Comprehensive Plan process, the overall direction and policy issues facing the community, and begin the discussion of the future vision of the community. The meeting will include an exercise to identify Wauwatosa’s top issues, concerns, assets, and priorities.



## Step 2: Community Engagement

Anticipating high levels of participation from an active and engaged community, our proposed outreach processes for the Comprehensive Plan include both traditional (face-to-face) and web-based activities to obtain the broadest levels of participation possible. Outreach summaries will be prepared at the end of each event of our engagement effort. The summaries will be delivered to staff for review and posted to the project website. Outreach summaries will be compiled and incorporated into the Existing Conditions Memorandum/Presentation (task 3e).

### 2a: Project Website

At the onset of the project, we will design and host an interactive project website linked to the City's existing website. We are committed to using the internet to maximize the participation and communication between the City and its residents. An interactive project website provides a home base for information regarding the Comprehensive Plan. This website will be used to promote and popularize the planning process and be used to post project schedules and meeting dates; display graphics, interactive maps, and draft documents; address frequently asked questions; host map.social; and provide an online community questionnaire.

### 2b: Online Community Questionnaire (Survey for Public Input)

To provide another means for community participation, we will prepare an online questionnaire for the residents and business owners of Wauwatosa to offer a community-wide opinion on a range of topics and issues. The business component of the questionnaire will include the opportunity to provide specific input on those issues and concerns most important to the City's business community. The online community questionnaire will be easily accessible on the project website. At the close of the questionnaire response period, we will review and summarize results as a gauge of community issues, key themes, and principles.

### 2c: map.social (Online Map-Based Engagement Platform)

The project website will feature map.social, a web-based community issues mapping tool. Developed by Houseal Lavigne, this tool allows users to identify, map, and comment on geographic areas of concern and valued community amenities. map.social simplifies the mapping process and familiarizes users with all areas of the Wauwatosa community in a manner that is exciting, interactive, and effective. Input from users allows us to create a composite map of community issues to assist with the establishment of community goals and policies. The City can publicize the map.social link using email lists, social media, and postcards.

### 2d: Key Stakeholder Interviews/Focus Groups (up to 12)

Key stakeholder interviews allow us to gain insight into the community that we might otherwise not be able to obtain. Up to 12 confidential interviews will be conducted to obtain additional information regarding local issues and potentials. The Project Team will work with staff and elected officials to identify those to be interviewed. We recommend a broad sampling of interviewees who may possess unique perspectives or special insights into the community. Interviewees could include selected property owners, new or lifelong residents, local business owners, school district officials, adjacent communities, citizen members from relevant City Boards and Commissions, and representatives from other government agencies, institutions, and/or civic groups. The interviews will be conducted in person during scheduled visits related to other outreach events or via telephone/virtual conference as needed.





## **2e: Do-It-Yourself (DIY) Workshop Kits**

To effectively engage residents at the local/neighborhood level, the Project Team will prepare Do-It-Yourself (DIY) workshop kits. DIY workshop kits will allow City staff, community groups, and residents to facilitate their own workshops and gather input from specific segments of the population that may not otherwise participate in more formal planning activities.

The Steering Committee and City staff will play a key role in helping distribute DIY workshop materials to target groups and providing summary information to the Project Team. DIY Workshops can either be conducted by staff or volunteers as in-person events or hosted online using a small group virtual event format such as Zoom or Microsoft Teams. Houseal Lavigne will summarize the results of up to 10 DIY workshop kits.

## **2f: Business Community Workshop (one event)**

This workshop will be targeted specifically to business owners and managers, developers, and Wauwatosa's corporate citizens as an important stakeholder group. The purpose of the workshop is to establish a dialogue and obtain feedback from those members of the business community that have a unique insight and perspective and whose assistance and involvement are crucial to the Plan's ultimate success. The workshop will be scheduled to coincide with other in-person engagement activities and can be conducted in the early morning to minimize impacts to business owners or scheduled as part of a regularly scheduled event where numerous property owners and business owners are typically in attendance.

## **2g: Community Visioning Workshop Series (up to three events)**

The purpose of a Community Visioning Workshop is to allow residents and stakeholders to tell Project Team what they think before policies and recommendations are crafted. The Community Visioning Workshop series will involve the Project Team, elected officials, City staff, the Steering Committee, and members of the community.

The workshop will begin with a large group exercise where participants will work together to identify planning priorities, issues, and opportunities. Participants will then "break out" into small groups for a mapping exercise where they will put pen to paper and work to develop their "vision" for the future of the community. The workshop will conclude with a general agreement regarding the community's issues and opportunities, key planning themes and principles, the long-term role and character of Wauwatosa, and the projects and improvements that will be desirable in the future.

*The three visioning workshops can be conducted in various locations throughout the City during one trip on consecutive days, including one daytime event, and two evening events. Tasks 2f and 2g will be conducted during the same trip.*

## **2h: Community Engagement Key Themes and Takeaways Summary**

This task will conclude with a summary of the key themes and takeaways from all initial community outreach events. The summary will provide focus and direction for subsequent activities. The summary will be incorporated into the Existing Conditions Memorandum delivered as part of Step 3.



## Step 3: Existing Conditions Analysis

This step will include the preparation of an Existing Conditions Memorandum that will provide an inventory and summarize our analysis of existing conditions, document existing land uses, identify key thoroughfares and community facilities, and provide an economic and demographic profile. It will be based on issues and opportunities identified in outreach, past plans and studies, information provided by the City and partner agencies, feedback from community service providers, and reconnaissance conducted by the Project Team. We intend to move through this step efficiently, reserving the project budget and resources for visioning, planning, and action.

### 3a: Current and Past Plans, Studies, and Reports Summary

We will review existing plans and policies, including:

- 2008-2030 Comprehensive Plan
- East Tosa North Avenue Plan
- The Village of Wauwatosa, A Strategic Redevelopment Plan
- Burleigh Triangle and Mayfair Road Corridor North Redevelopment Vision and Plan
- Redevelopment District No. 1 Project Plan
- Bike and Pedestrian Facilities Plan
- Midtown North Avenue Plan
- Wauwatosa Life Sciences District
- Active Tosa – Park and Recreation Plan

This review process will help determine 1) recently adopted City policies that need to be reflected in the Comprehensive Plan, 2) changes within the community that have occurred since the adoption of previous plans, 3) conflicts between or deficiencies within existing plans, and 4) the validity of previously collected data.

### 3b: Demographic Analysis and Economic Profile

The project team will prepare a demographic analysis of the Wauwatosa community that will include a summary of population, households, income, age characteristics, racial and ethnic composition, and labor force and employment. This analysis will be summarized, and a profile will be formulated that will provide an overview of trends for residential, retail, office, and industrial land uses. We will use U.S. Census data as well as proprietary data sources for this analysis.





### 3c: Existing Conditions Analysis

We will inventory existing land use, transportation, environmental features, and community facilities. This task will provide a foundational understanding of the community. The Existing Conditions analysis will include an evaluation of the following components, each presented in the Existing Conditions Memorandum with text and maps based on data provided by the City:

#### *Land Use and Development*

Field reconnaissance, aerial imagery assessment, and a review of the City's GIS data will be used to inventory land use in the City. An existing land use map that identifies all existing land uses within the City will be prepared.

#### *Zoning and Development Regulations*

A preliminary assessment of the City's current zoning code (Title 24), zoning map, and established development regulations will be conducted to identify alignment with existing land use and needed areas of improvement.

#### *Transportation and Mobility*

Existing transportation conditions, including vehicular, bike and pedestrian facilities, and transit will be assessed along with a review of existing transportation information from the City, Milwaukee County, Wisconsin Department of Transportation (WisDOT), and other sources as needed/relevant. An inventory will be compiled of planned and proposed improvement projects, and existing deficiencies and issues. An existing transportation map will be prepared as part of this task.

#### *Community Service Facilities and Infrastructure*

Public and semi-public facilities and services will be inventoried and assessed regarding location, capacity, and future needs. To support this inventory, a community facilities survey will be sent to the necessary facility and service providers in the community. An existing community facilities and infrastructure map will be prepared.

#### *Parks, Open Space, and Natural Features*

Recreational facilities, amenities, parks, and trails will be inventoried and assessed. This analysis will also inventory natural resource conservation areas and riparian areas. An existing parks and natural features map will be prepared.

### 3d: Existing Conditions Memorandum

The Project Team will compile the results from community engagement activities and the existing conditions analysis into an Existing Conditions Memorandum. The memorandum will include existing conditions, issues, and opportunities that will be addressed in the new Comprehensive Plan. The Existing Conditions Memorandum/Presentation is an interim deliverable collecting and presenting data and information gathered in Steps 1 through 3 under a single memorandum to City staff and the Steering Committee.

### 3e: Staff Review (Virtual/Remote)

City staff and the Project Team will review the Existing Conditions Memorandum ahead of its distribution to the Steering Committee. The review process may include two rounds of revisions. We will also work to ensure that substantive comments provided by staff integrate into the ensuing Plan development. This meeting will be a conference call/screen share with City staff.

### 3f: Steering Committee Meeting

The Project Team will meet with and present the Existing Conditions Memorandum to the Steering Committee to gather feedback and input. During this meeting, key redevelopment sites and potential areas for focused study will be identified.



## Step 4: Vision, Goals, and Preliminary Land Use Element

The Comprehensive Plan needs to establish an overall “vision statement” for the future of Wauwatosa that can provide focus and direction with goals based on analysis and themes identified during community outreach. The vision and goals, combined with a Preliminary Land Use Element to direct place-based recommendations, will serve as the “cornerstone” of the consensus-building process and provide focus and direction for subsequent planning activities.

### 4a: Vision Statement and Goals

The Project Team will synthesize all feedback received during the previous tasks of the planning process and prepare a vision statement and goals for the City of Wauwatosa. The vision statement will be prepared based on feedback from the community visioning workshop, community outreach activities, and observations garnered from the existing conditions memorandum. Plan goals will also be developed to provide a more specific focus and direction for planning recommendations. As a starting point, we will assess and update goals from the 2008-2030 Comprehensive Plan. The Project Team will develop additional categories for goals that no longer apply or were not part of the previous plan.

### 4b: Preliminary Land Use Element

Based on the outcome of the previous tasks, the Preliminary Land Use Element will include recommendations and policies for the next 20 years for all land use areas in the City including residential areas and neighborhoods, mixed use areas, commercial and industrial/production areas, open space, areas of the natural environment, and public and quasi-public uses.

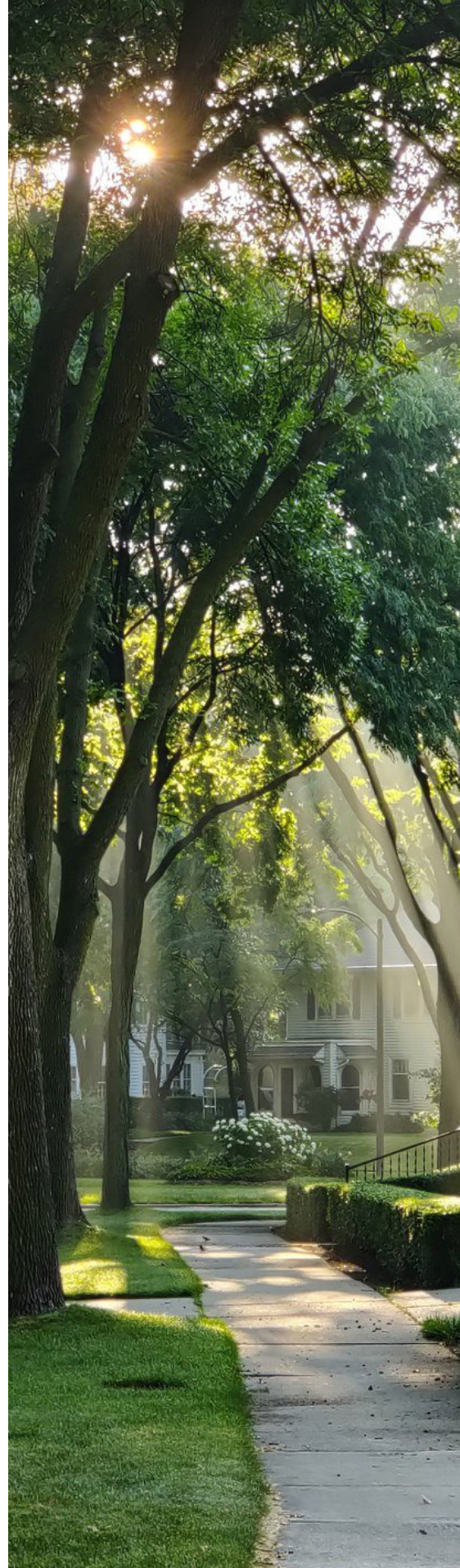
The Preliminary Land Use Element will form the core of the Land Use Plan Element and will identify and address a range of land use topics such as desired development and redevelopment patterns, land use compatibility issues and mitigation strategies, commercial and mixed-use development, and open space conservation areas. This first core element will provide the overarching guidance to all other land use-related components of the Comprehensive Plan including housing and economic development elements developed in Step 5.

### 4c: Staff Review (Virtual/Remote)

Staff and the Project Team will review the Vision, Goals, and Preliminary Land Use Element of its distribution to the Steering Committee. Comments provided by staff will be integrated into the Vision Statement and Goals and distributed to the Steering Committee for its review.

### 4d: Steering Committee Meeting

The Project Team will meet with and present the Vision, Goals, and Preliminary Land Use Element to the Steering Committee to gather feedback and input.



## Step 5: Preliminary Elements

This step will entail the preparation of draft plan elements and recommendations.

### 5a: Preliminary Elements

Collectively, the following elements will identify trends that should be considered in planning for the future and address issues identified by the community, City staff, and stakeholders. Although the elements will accommodate appropriate and desirable development and improvements, all elements will be respectful and supportive of the community's vision and goals developed in the previous task. Each element will be highly illustrative and graphically compelling. Maps, illustrations, and concept visualizations will be utilized to convey planning and development concepts and recommendations.

We understand that the final plan will include the elements as defined in Wisconsin Statutes Sec 66.100, whether individually or combined into larger elements. While the elements will be refined with staff at the outset of the process, based on our preliminary understanding of the community, the following will be prepared as part of Task 5a:

#### *Housing Element*

The Housing Element will consider location, types, age, and condition of housing; owner and renter occupancy; and affordability of housing. This element will identify the recommended location for different housing types to meet the current and future needs of Wauwatosa's residents. The element will include a discussion of anticipated impacts of demographic trends and regional growth based on the existing conditions analysis.

#### *Economic Development Element*

The Economic Development Element will provide additional detail and guidance regarding desired retail, office, and industrial development. It will also outline policies designed to strengthen employment, job creation, and to provide and grow a diverse and thriving tax base for the City, focusing on existing and planned commercial and industrial use areas, including key core areas such as the Village of Wauwatosa.

#### *Transportation Element*

The Transportation Element will focus on the coordination and optimization of all modes of travel within the City, including vehicular, bicycle, walking, and transit services. "Complete Streets" principles will be incorporated as appropriate throughout the framework, to ensure effective mobility environments for pedestrians, cyclists, motorists, and persons using public transit.

#### *Utilities, Infrastructure, and Community Service Facilities Element*

The Utilities, Infrastructure, and Infrastructure, and Community Service Facilities Element will identify and inventory all community facilities and service providers in the City and include recommendations and policies for municipal facilities and services and intergovernmental coordination and cooperation. This element will help plan for anticipated capital needs such as investments in water supply, treatment, and distribution; sewage system and wastewater treatment; and solid waste collection and disposal.

#### *Parks, Open Space, and Natural Resources Element*

The Parks, Open Space, and Natural Resources Element will identify linkages, environmental protection areas, open space, and unique and sensitive natural resources. This element will consider riparian corridors and other water resources, forested land, parks and recreation areas, wetlands, and other environmental features and ecological systems.





### **5b: Subarea Planning (OPTIONAL)**

In addition to citywide plan elements, policies, and recommendations, we can prepare detailed subarea plans within the Comprehensive Plan. Recognizing certain areas of Wauwatosa are more susceptible to change or impacts from new development, more detailed planning efforts may be needed to better guide investment. If this optional task is selected, we will work with City staff and the Steering Committee to identify and develop subareas for two to three key areas, depending on the size of the areas and the complexity of the issues addressed. Areas of the City impacted by a need for housing, neighborhoods where extension of a “complete neighborhood” atmosphere is desired, and areas where new development is anticipated may be considered for subareas.

Subareas can address land use and development, urban design, and access and mobility issues within each character area. The subareas will establish the guiding considerations, objectives, and priorities for each area, firmly establishing character and future intent. Each subarea will utilize graphics, illustrative plans, and images to demonstrate important local planning concepts.

### **5c: Catalyst Site Concepts (OPTIONAL)**

As part of the subarea planning, sketch plans illustrating potential site configurations can be developed for key redevelopment sites identified in the existing conditions analysis as part of task 3d. The sketch concepts will establish use programs, parcel division, lot/building orientation and layout, parking layout, access, circulation, buffering, landscaping, and open space/detention. The sketch concept plans will also explore different mixes and approaches to assist in attaining the best use and desired development characteristics within the subarea.

### **5d: Web Meetings Series (Two Virtual/Remote Meetings)**

The Project Team will conduct a series of two web meetings focusing on the Preliminary Elements listed above. Each web meeting will provide an opportunity for the Project Team, City staff, and the Steering Committee to discuss preliminary policies, plan recommendations, and initial maps and graphics... Web meetings can be hosted by the Project Team and recorded for City staff and any Steering Committee members unable to attend.

The use of web meetings will increase the number of touchpoints between the Project Team, City staff, and the Steering Committee. This will provide for a more responsive and efficient workflow that minimizes the potential for issues and time-consuming revisions, maximizing Project Team resources spent on plan development. This process will also enable incremental review of draft plan content by City staff and the Steering Committee, rather than a wholesale review, which can be arduous and dilute the quality of input. This approach allows City staff and the Steering Committee to effectively monitor the progress of the work program at a manageable scale.

## Step 6: Draft Comprehensive Plan

Based on the previous steps and tasks in the planning process, the draft version of the Comprehensive Plan will be prepared and presented for review.

### 6a: Draft Comprehensive Plan Document

Based on feedback received in Step 5 the Project Team will prepare the draft Comprehensive Plan document that synthesizes the findings and recommendations contained in these deliverables. The plan will be user-friendly, highly illustrative, and visually compelling. Concise, well-written text will be combined with attractive and easy-to-understand maps, graphics, illustrations, and photographs to effectively communicate the Plan's policies and recommendations. The new Wauwatosa Comprehensive Plan will include all draft elements from Steps 4 and 5 and will meet or exceed all state requirements for comprehensive planning in the State of Wisconsin.

#### *Implementation Element*

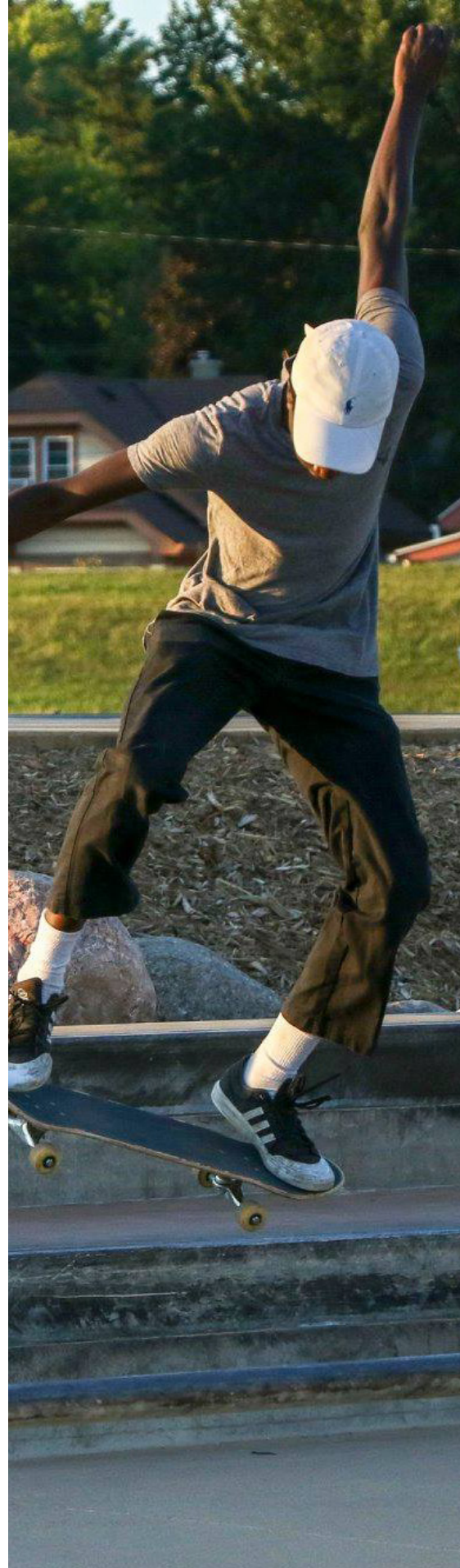
The new Wauwatosa Comprehensive Plan will include an Implementation Element that will describe the actions required to carry out the policies contained in the Comprehensive Plan, including identifying potential short-, medium-, and long-range strategies and recommendations related to zoning and other land use regulations, potential capital improvement projects, funding sources and implementation methods, timing and prioritization, and general administration, management, and a clear process for timely updates to the Comprehensive Plan. The Project Team will work with staff to ensure that these implementation recommendations are practical and actionable.

### 6b: Staff Review (Virtual/Remote)

The Project Team will submit the draft Comprehensive Plan and document to staff in electronic format for final review. It is anticipated that the plan will be subjected to a two- or three-stage review process.

### 6c: Steering Committee Working Session

A final meeting will be conducted with the Steering Committee to review and reach an agreement on the draft Comprehensive Plan document before proceeding to the public review and adoption process. Appropriate revisions to the draft Plan will be made based on feedback from the Steering Committee and the final Comprehensive Plan will be prepared for community open house presentation.







#### **6d: Community Open Houses (up to four)**

Members of the Project Team, along with City staff, will be present for a community open house to allow residents and community stakeholders the opportunity to examine, discuss, and comment on the contents of the draft Comprehensive Plan document. The Project Team will be available throughout the community open house to present material, answer questions, and get feedback before initiating the approval process.

*The community open houses can be conducted in various locations throughout the City during one trip on consecutive days, including two daytime events, and two evening events.*

#### **6e: Plan Commission Presentation**

The Project Team will present the draft Comprehensive Plan document at one (1) Plan Commission meeting.

#### **6f: Common Council Adoption**

The Project Team will present the draft Comprehensive Plan document for adoption at one (1) Common Council meeting.

#### **6g: Final Comprehensive Plan Document**

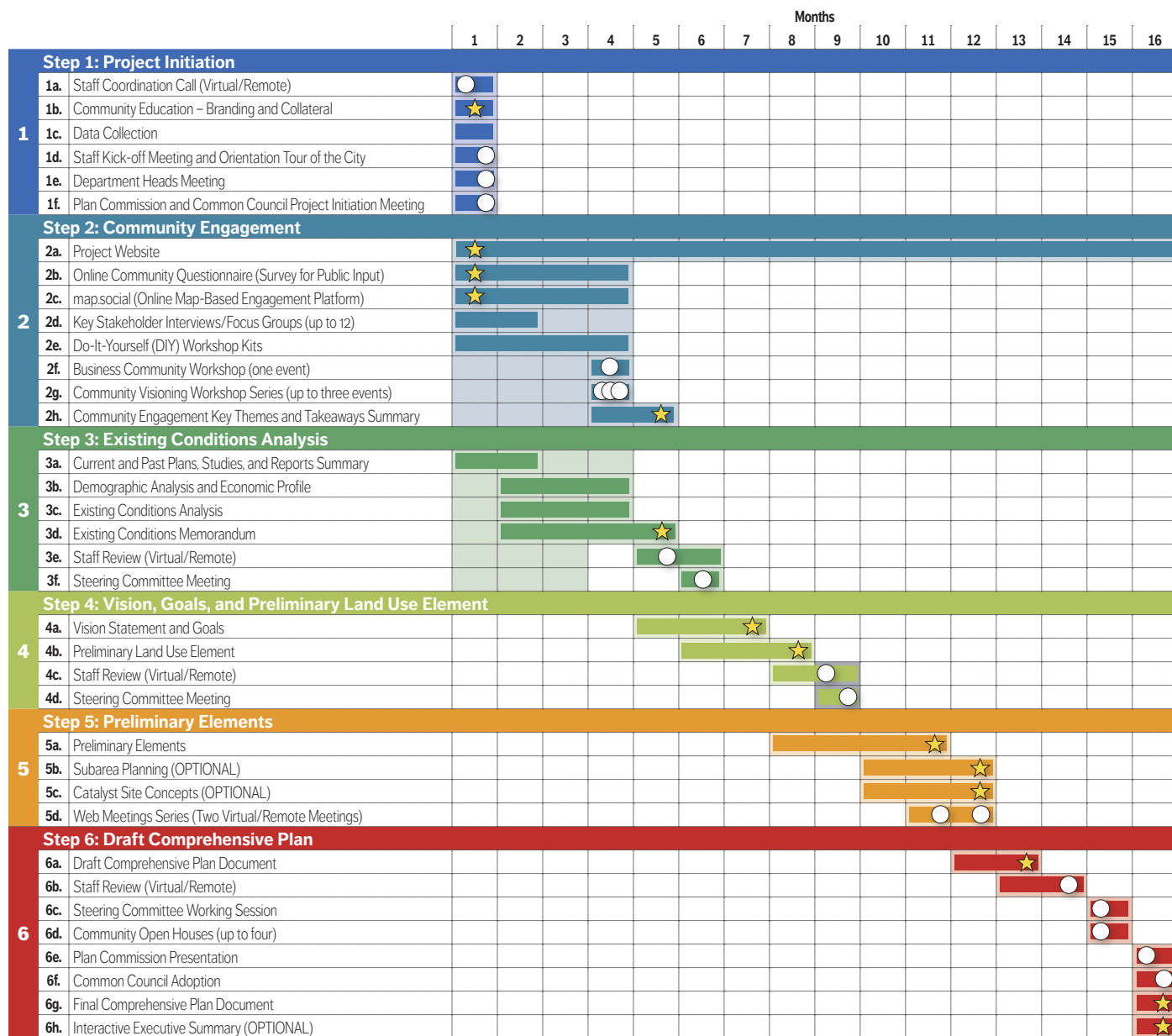
Following the community open house and presentations, the Project Team will work with City staff to revise the draft Comprehensive Plan. It is anticipated that up to two additional review cycles may be necessary to incorporate any final changes.

#### **6h: Interactive Executive Summary (OPTIONAL)**

The planning process for Wauwatosa will yield a traditional "long-form" plan. The plan document will allow for printing and on-screen viewing and easy distribution, searching, and navigation. In addition, we can leverage ArcGIS Online StoryMaps to create an "app," providing an interactive Executive Summary version of the Comprehensive Plan. Combined with photos, text, and other media, ArcGIS Online will power interactive maps that can be queried and explored, providing an engaging, "digital" way to experience the Comprehensive Plan. Content will be interwoven with attractive maps, visuals, and interactive content that simplifies navigation between related, cross-referenced components of the plan. This step will take place after the Comprehensive Plan is adopted, as it cannot be completed before adoption.

# Project Schedule

The project schedule below provides an overall framework to complete the proposed project approach. Should the City favor our basic approach, we will work with staff to refine the process and anticipated project schedule in a manner that is most advantageous to the project.



○ Denotes meetings to be conducted

★ Denotes deliverable to be produced by our Team







SECTION 6

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# **FEE PROPOSAL**



# Fee Proposal

**Fee Statement:** Houseal Lavigne proposes a lump sum, not-to-exceed fee of **\$199,710** for the City of Wauwatosa Comprehensive Plan, including all professional fees and directly related project expenses. If the City favors our basic approach, we will work to amend our scope of work as necessary to meet any budgetary constraints.

Task	Fee
Step 1: Project Initiation	\$ 19,975
Step 2: Community Engagement	\$ 36,275
Step 3: Existing Conditions Analysis	\$ 38,660
Step 4: Vision, Goals, and Preliminary Land Use Element	\$ 23,340
Step 5: Preliminary Elements	\$ 46,700
Task 6: Draft Comprehensive Plan	\$ 34,760
<b>Total Professional Fees (Not-to-Exceed Cost)</b>	<b>\$ 199,710</b>

*Note: The following optional tasks (described in the scope of work) are not included in the lump sum/not-to-exceed fee proposal. If these tasks are desired, we will work with the City to determine a fee based on Wauwatosa's specific needs.*

- 5b: Subarea Planning
- 5c: Catalyst Site Concepts
- 6g: Interactive Executive Summary





SECTION 7

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# **SAMPLE STANDARD CONTRACT**



# **Service Agreement/Contract**

## **PROFESSIONAL SERVICES AGREEMENT**

**(MONTH, DAY, 2023)**

**BETWEEN**

**THE CITY OF WAUWATOSA, WI**

**AND**

**HOUSEAL LAVIGNE ASSOCIATES, LLC.**



# AGREEMENT FOR PROFESSIONAL SERVICES

## BETWEEN THE CITY OF WAUWATOSA

### AND

## HOUSEAL LAVIGNE ASSOCIATES, LLC.

THIS AGREEMENT, made and entered into this [REDACTED] day of [REDACTED], 2023, by and between HOUSEAL LAVIGNE ASSOCIATES LLC., an Illinois Limited Liability Company with principal offices at 188 W. Randolph, Suite 200, Chicago, IL 60601 (hereinafter referred to as the "CONSULTANT"), and the City of Wauwatosa, a municipal corporation of the State of Wisconsin, whose mailing address is 7725 W. North Avenue, Wauwatosa, WI 53213 (hereinafter referred to as the "CLIENT").

WITNESSETH THAT:

**WHEREAS**, the CLIENT desires to engage the services of the CONSULTANT to furnish technical and professional assistance in connection with the preparation of the Wauwatosa Comprehensive Plan (hereinafter referred to as the "PROJECT") and the CONSULTANT has signified its willingness to furnish technical and professional service to the CLIENT; and WHEREAS, the CONSULTANT represents to the CLIENT that it has sufficient expertise and resources to enable it to provide such advice and assistance to the CLIENT; and

**WHEREAS**, the CLIENT is interested in hiring a CONSULTANT to assist with a project, and

**WHEREAS**, CONSULTANT is qualified to do business in Wisconsin, and

**WHEREAS**, The CLIENT and CONSULTANT wish to enter into this Agreement to specify the duties and obligations of the Parties for the Services described herein, and

**WHEREAS**, CONSULTANT is willing to perform Services in accordance with the terms hereinafter provided, agrees to comply with all federal, state, and local laws and ordinances applicable to this Agreement.

NOW, THEREFORE, the parties do mutually agree as follows:

A. Scope of CONSULTANT's Services

The CONSULTANT agrees to perform in a good and professional manner those services described in Attachment A, *Scope of Services*, Section 2, a copy of which is attached hereto and incorporated in this AGREEMENT. All documents, work papers, maps, and study materials produced by the CONSULTANT in the performance of these services become the property of the CLIENT during and upon completion of the services to be performed under this AGREEMENT.

B. Services to be Provided by the Client

All existing information, data, reports, and records which are useful for carrying out the work on this PROJECT and which are owned or controlled by the CLIENT shall be furnished to the CONSULTANT in a timely manner. The completion of the services to be performed by the CONSULTANT under this AGREEMENT is contingent upon the receipt from the CLIENT, at no cost to the CONSULTANT, the data and reports and other material as described in Attachment A, Section 1, in a timely manner. If, by reason of any fault of CLIENT, the information, data, reports and records to be provided by the CLIENT are not made available to the CONSULTANT in a timely manner, the CONSULTANT may, at its option, stop work on the PROJECT until such materials are provided.

C. Meetings and CONSULTANT Visits

The CONSULTANT will attend meetings as specifically identified in the *Scope of Services*, Attachment A, Section 2. A "meeting" within the body of this AGREEMENT shall mean a gathering requiring the attendance of the CONSULTANT or CONSULTANT's staff, including workshops, formal presentations, interviews, meetings with CLIENT'S staff, public meetings and workshops, and public hearings. Public meetings shall be scheduled at least seven (7) to fifteen (15) days in advance, and public hearings shall be scheduled with sufficient advance notice to comply with state and local notice

requirements. Attendance at “additional” meetings, meetings not identified in Attachment A, Section 2, *Scope of Services*, will be subject to the provisions of Article M (Extra Work) of this AGREEMENT. The CONSULTANT may conduct “site visits” to gather information, data, and perform field reconnaissance. These “site visits” shall not be counted as meetings under this AGREEMENT. When conducting “site visits” or in the community attending scheduled meetings, the CONSULTANT may informally meet with CLIENT staff to review and discuss aspects of the PROJECT. These informal CLIENT meetings with staff shall not be counted as meetings under this agreement. Throughout the PROJECT the CONSULTANT may conduct phone calls or teleconferences with CLIENT staff on an as needed basis, to maintain open communication and discuss certain aspects of the PROJECT. These phone calls and teleconferences with CLIENT staff shall not be counted as meetings under this AGREEMENT.

#### D. Deliverables

CONSULTANT agrees to provide products to the CLIENT as identified in Attachment A, Sections 2, *Scope of Services*. The CONSULTANT shall provide all deliverables at least five (5) days in advance of all public meetings. All deliverables become the property of the CLIENT, including all hard copies and electronic (PDF format) file copies.

#### E. Changes

The CLIENT may, from time to time, request changes in Attachment A, *Scope of Services*, of the services to be performed by the CONSULTANT hereunder. Such changes, including any appropriate increase or decrease in the amount of compensation, which are mutually agreed upon, shall be incorporated in written amendments to this AGREEMENT.

#### F. CONSULTANT's Compensation

The CONSULTANT shall be compensated for services rendered under the terms of this AGREEMENT on the basis of the CONSULTANT's hourly rates as stated under Article G (Hourly Rates) and Attachment A, Section 3 for the staff time devoted to the PROJECT, and for directly related project expenses. The maximum cost for CONSULTANT services under this AGREEMENT is **\$199,710**.

requirements. Attendance at "additional" meetings, meetings not identified in Attachment A, Section 2, *Scope of Services*, will be subject to the provisions of Article M (Extra Work) of this AGREEMENT. The CONSULTANT may conduct "site visits" to gather information, data, and perform field reconnaissance. These "site visits" shall not be counted as meetings under this AGREEMENT. When conducting "site visits" or in the community attending scheduled meetings, the CONSULTANT may informally meet with CLIENT staff to review and discuss aspects of the PROJECT. These informal CLIENT meetings with staff shall not be counted as meetings under this agreement. Throughout the PROJECT the CONSULTANT may conduct phone calls or teleconferences with CLIENT staff on an as needed basis, to maintain open communication and discuss certain aspects of the PROJECT. These phone calls and teleconferences with CLIENT staff shall not be counted as meetings under this AGREEMENT.

#### D. Deliverables

CONSULTANT agrees to provide products to the CLIENT as identified in Attachment A, Sections 2, *Scope of Services*. The CONSULTANT shall provide all deliverables at least five (5) days in advance of all public meetings. All deliverables become the property of the CLIENT, including all hard copies and electronic (PDF format) file copies.

#### E. Changes

The CLIENT may, from time to time, request changes in Attachment A, *Scope of Services*, of the services to be performed by the CONSULTANT hereunder. Such changes, including any appropriate increase or decrease in the amount of compensation, which are mutually agreed upon, shall be incorporated in written amendments to this AGREEMENT.

#### F. CONSULTANT's Compensation

The CONSULTANT shall be compensated for services rendered under the terms of this AGREEMENT on the basis of the CONSULTANT's hourly rates as stated under Article G (Hourly Rates) and Attachment A, Section 3 for the staff time devoted to the PROJECT, and for directly related project expenses. The maximum cost for CONSULTANT services under this AGREEMENT is **\$199,710**.



submittals, services, data, and reports as are delivered to the CLIENT's representative; and fifteen (15) calendar days for such decisions and choices to be made by the City Council, or other elected or appointed bodies of the CLIENT. If the CLIENT requests that CONSULTANT perform Extra Work as defined in Article M such as is not now included in Attachment A, the CONSULTANT, if agreed to by the CLIENT, may suspend work on the PROJECT or a portion of the PROJECT, and may extend the period of time allotted to perform the services identified in Attachment A under this AGREEMENT, to a mutually agreed upon period of time necessary to compensate for Extra Work. Where the CLIENT and CONSULTANT mutually agree to extend the period of time to perform services under this AGREEMENT, the hourly rates may not be increased beyond those set forth in Section G. of this AGREEMENT, provided that the cause or reasons of such extension(s) are not the fault of the CLIENT.

#### J. Excusable Delays

The CONSULTANT shall not be in breach of this AGREEMENT by reason of any failure in performance of this AGREEMENT in accordance with its terms if such failure arises out of causes beyond the reasonable control and without the fault or negligence of the CONSULTANT. Such causes may include, but are not restricted or limited to, acts of God or of the public enemy, acts of government in either its sovereign or contractual capacity, fires, floods, strikes, and unusually severe weather, but in every case, so long as the failure to perform is beyond the reasonable control and without the fault or negligence of the CONSULTANT, the CONSULTANT shall not be deemed to be in breach of this AGREEMENT.

#### K. Termination

The CLIENT shall have the right to terminate this AGREEMENT by written prior notice to the CONSULTANT at least five (5) working days before the specified effective date of such termination. In such event, documents and work papers prepared by the CONSULTANT under this AGREEMENT shall become the property of the CLIENT. On receipt of said documents and work papers by the CLIENT, the CONSULTANT shall receive compensation and reimbursement for the work actually performed before the date of termination, in accordance with Article F, CONSULTANT's Compensation, of this AGREEMENT, less payment for services and expenses previously paid.

#### L. Non-discrimination

The CONSULTANT shall engage in lawful employment practices. The CONSULTANT shall not fail, refuse to hire, discharge, or otherwise discriminate against any individual with respect to his or her compensation, terms, conditions, or privileges of employment, because of such individual's race, color, religion, sex, national origin, or handicap unrelated to the individual's ability to perform the duties of the position.

#### M. Extra Work

If requested and agreed to in writing by the CLIENT and CONSULTANT, the CONSULTANT will be available to furnish, or obtain from others, Extra Work of the following types:

1. Extra work or extended services due to changes in the general scope or timing of the PROJECT, including, but not limited to; changes in size, complexity or character of the work items; acceleration of the work schedule involving services beyond normal working hours; non-delivery of any materials, data, or other information to be furnished by the CLIENT not within the reasonable control of the CONSULTANT.
2. Additional or extended services, including PROJECT administration due to the prolongation of the period of delivery of services specified in this AGREEMENT time through no fault of the CONSULTANT.
3. Attendance at additional meetings beyond those made part of the AGREEMENT.
4. Other additional services requested and agreed to by the CLIENT and CONSULTANT, which are not otherwise provided for under this AGREEMENT.

The compensation and schedule for completing Extra Work authorized by the CLIENT shall be subject to negotiation between the CLIENT and the CONSULTANT in accordance with the provision of Article E (Changes) of this AGREEMENT. However, the hourly rate in effect at the time of any change authorizing Extra Work will continue to be in effect for such Extra Work.

#### N. Entire Agreement

This agreement, including the attachments to this agreement, contains the entire agreement of the parties. It may not be changed orally but only by an amendment in writing executed by the parties to this AGREEMENT.

O. Governing Law

This AGREEMENT will be governed by and construed in accordance with the laws of the State of Wisconsin and within the jurisdiction of Milwaukee County.

P. Client Representative to CONSULTANT

The CLIENT designates [REDACTED] to act as its representative with respect to the work to be performed under this AGREEMENT, and such person shall have authority to transmit instructions, receive information, interpret and define CLIENT's policies and provide decisions in a timely manner pertinent to the work covered by this AGREEMENT until the CONSULTANT has been advised in writing by the CLIENT that such authority has been revoked. The CONSULTANT designates John Houseal as the CONSULTANT's representatives to the CLIENT.

Q. Employment Opportunity

The Consultant shall not discriminate against any employee or applicant for employment because of race, religion, color, sex or national origin. The Consultant shall take affirmative action to insure that applicants are employed, and that employees are treated during their employment, without regard for their race, religion, color, sex, or national origin or any other protected class. Such actions shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff, or termination; rates of pay, or other forms of compensation; and selection for training including apprenticeship.

U. General Compliance with Laws

CONSULTANT agrees to comply with all federal, state, and local laws and ordinances applicable to the work in effect at the time of the work. If CONSULTANT is found to have been in violation of any applicable federal, state, or local laws and ordinances, such violation may be the basis for the suspension or termination under this Agreement.

IN WITNESS WHEREOF, the CLIENT and the CONSULTANT have executed this AGREEMENT on the date and year first above written.

CONSULTANT:

HOUSEAL LAVIGNE ASSOCIATES, LLC.

X\_\_\_\_\_

John A. Houseal, FAICP

Principal

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

CLIENT:

City of Wauwatosa

X\_\_\_\_\_

Name/Title: \_\_\_\_\_

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



## ATTACHMENT A

---

### SCOPE OF SERVICES and HOURLY RATES

This section describes the Scope of Services for preparing the Comprehensive Plan for the City of Wauwatosa.

### **Section 1:** **CLIENT ASSISTANCE TO THE CONSULTANT**

Whereas the scope of services will be undertaken by the CONSULTANT, it is understood and agreed that the CLIENT will provide the following assistance to the CONSULTANT:

1. The CLIENT, with the CONSULTANT's assistance, will schedule and arrange and provide notices for all meetings and workshops including contacting agencies, individuals and citizens to be invited to meetings.
2. The CLIENT, with the CONSULTANT'S assistance, will collect and compile previously prepared and available reports, projects, studies, maps and other data owned or in control of the CLIENT and that might be useful for the project.
3. The CLIENT will provide to the CONSULTANT an up-to-date base map (electronic and hard copy), including GIS files and information.

## **Section 2:** **SCOPE OF SERVICES**

*Attach Scope of Services, including identification of deliverables.*

## **Section 3:**

### **BUDGET & HOURLY RATES**

#### **Budget**

Houseal Lavigne proposes a not to exceed amount of **\$199,710**, including directly related job expenses.

#### **Houseal Lavigne Hourly Rates**

Principal	\$230-250
Senior Project Manager	\$180
Project Manager	\$145
Planner II	\$130
Planner I	\$110
Clerical/Technical	\$85



To: **Financial Affairs Committee**  
From: **Jalal Ali, Director of Information Services**  
Date: **3/2/2023**  
Subject: **Approval of one-year Support and Licensing Renewal Agreement with Nutanix for hyper-converged technology to run the City's technology services, in the amount of \$54,998.39**

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#### **A. Background/Rationale**

The City of Wauwatosa has used Nutanix hyper-converged infrastructure (HCI) as the technology to run over 120 virtual servers in the City's two data centers. These servers facilitate the operations of most of the City's services including Financial, Human Resources and payroll, 911 Dispatch, Police and Fire record management, email, file services, to name a few. The Nutanix infrastructure was installed in 2019 following an extensive research and RFP process to replace an aging unsupported platform.

Hyper-converged technology is an IT infrastructure solution that combines storage, computing, and networking into a single platform, making it easier and more efficient to manage. Hyper-convergence takes many of the, previously separate, components that make up a data center and consolidates them into a unified platform. This unification, or convergence, allows tighter integration of those parts thus providing for a single management interface to manage the three tiers. This reduces staff time required to maintain our systems up-to-date while also reducing costs and improving scalability. Hyper-convergence has allowed us to focus on our service offering and meeting resident's needs rather than constantly managing compatibility of multiple disparate resources.

In the 2019 RFP, the City evaluated responses from four vendors with solutions ranging from \$508,000 to \$962,000 for relatively comparable solutions. After further research and discussion, the City selected Heartland Business Solutions' proposal to







install Nutanix at a cost of \$413,000 which included 3 years of support and maintenance. The selection of Nutanix was based on their market performance as visionary leader in the field with strong ability to execute their vision, according to the, then current, 2019 Gartner report. It was anticipated at the time that renewals after year 3 would cost \$75,000. These costs include licensing fees to continue use of the Nutanix software. The renewal also provides 4-hour response to replacement of failing server components as well as support & updates to the software that activates these components.



Council approval is required since the renewal costs exceeds \$25,000. These costs are included in the 2023 Information Technology budget.

## B. Key Issues for Consideration

- Heartland Business Solutions (HBS) is the registered Value-Added Reseller (VAR) for Nutanix. As the registered, HBS receives exclusive renewal discounts from Nutanix that are not made available to other resellers. HBS is then able to extend those discounts to the City.
- Continued use of the Nutanix software requires renewal of software contracts



### **C. Fiscal Impact**

The March 26<sup>th</sup>, 2019 FAC memo listed the annual future financial impact to cover our servers, storage, and backup platform at \$75,000. Our current costs for this coverage are \$67,000 that also includes renewal of the backup software, Veeam.

This request is a one-year renewal of licensing, maintenance, and support of existing software and hardware. The City continues to qualify for large renewal discounts due to early adoption of Nutanix's solution.

### **D. Requested Action**

Approval of renewal agreement for one year at a cost of \$54,998.39

### **E. Attachments**

Renewal quote from Heartland Business Solutions



**Nutanix Renewal - April 2023**
**Quote #297937 v1**
**Prepared For:**
**Wauwatosa, City of**

 Jalal Ali  
 7725 W. North Ave  
 Wauwatosa, WI 53213

**P:** (414) 479-8926

**E:** jali@wauwatosa.net

**Prepared By:**
**Milwaukee Wisconsin Area Office**

 Greg Borchard  
 N28 W23050 Roundy Drive Suite 200  
 Pewaukee, WI 53072

**P:** 262-650-6500 ext. 1222

**E:** gborchard@hbs.net

**Date Issued:**
**02.03.2023**
**Expires:**
**04.24.2023**

Nutanix Renewal - 1 Year		Price	Qty	Ext. Price
R-SW-PRS-PRO-NODE	Nutanix Prism Pro - subscription license renewal (1 year) - 1 node	\$379.91	10	\$3,799.10
R-SW-AOS-ULT-MCW	Nutanix AOS Ultimate - subscription license (1 year) + Mission Critical Support	\$30,550.27	1	\$30,550.27
R-L-CORES-ULT-MCW	Nutanix AOS Ultimate - subscription license (1 year) + Mission Critical Su	\$0.01	200	\$2.00
R-L-FLASHTIB-ULT-MCW	Nutanix AOS Pro - subscription license (1 year) + Production Support - 1 TiB capacity	\$0.01	70	\$0.70
RS-HW-MCW-ST	Nutanix MCL - Subscription License 1 Year Renewal	\$1,758.28	2	\$3,516.56
RS-HW-MCW-ST	Nutanix MCL - Subscription License 1 Year Renewal	\$2,139.97	8	\$17,119.76
Renewal Coverage: 04/25/2023 - 04/23/2024				
Customer understands that all orders for Nutanix are final when accepted by Nutanix. No cancellations, returns, exchanges or refunds are allowed.				
		Subtotal		<b>\$54,988.39</b>

Quote Summary		Amount
Nutanix Renewal - 1 Year		\$54,988.39
<b>Total:</b>		<b>\$54,988.39</b>

This quote may not include applicable sales tax, shipping, handling and/or delivery charges. Final applicable sales tax, shipping, handling and/or delivery charges are calculated and applied at invoice. The above prices are for hardware/software only, and do not include delivery, setup or installation by Heartland ("HBS") unless otherwise noted. Installation by HBS is available at our regular hourly rates, or pursuant to a prepaid HBSFlex Agreement. This configuration is presented for convenience only. HBS is not responsible for typographical or other errors/omissions regarding prices or other information. Prices and configurations are subject to change without notice. HBS may modify or cancel this quote if the pricing is impacted by a tariff. A 15% restocking fee will be charged on any returned part. Customer is responsible for all costs associated with return of product and a \$25.00 processing fee. No returns are accepted by HBS without prior written approval. This quote expressly limits acceptance to the terms of this quote, and HBS disclaims any additional terms. By providing your "E-Signature," you acknowledge that your electronic signature is the legal equivalent of your manual signature, and you warrant that you have express authority to execute this agreement and legally bind your organization to this proposal and all attached documents. Any purchase that the customer makes from HBS is governed by HBS' Standard Terms and Conditions ("ST&Cs") located at <http://www.hbs.net/standard-terms-and-conditions>, which are incorporated herein by reference. The ST&Cs are subject to change. When a new order is placed, the ST&Cs on the above-stated website at that time shall apply. If customer has signed HBS' ST&Cs version 2018.v2.0 or later, or the parties have executed a current master services agreement, the signed agreement shall supersede the version on the website. Certain purchases also require customer to be bound by end user terms and conditions. A list of end user terms and conditions related to various manufacturers and vendors is set forth at <https://www.hbs.net/End-User-Agreements>. Any purchase that customer makes is also governed by the applicable end user terms and conditions, which are incorporated herein by reference. If customer has questions about whether end user terms and conditions apply to a purchase, customer shall contact HBS. Any order(s) that exceeds the credit limit assigned by HBS shall require upfront payment from customer in an amount determined by HBS. HBS shall make this determination at the time of the order, unless customer has previously submitted the required onboarding paperwork. In such event, HBS shall make this determination at the time of quoting.

QT.2022.v1.0

Acceptance

Milwaukee Wisconsin Area Office

Wauwatosa, City of

Greg Borchard

Signature / Name

02/03/2023

Date

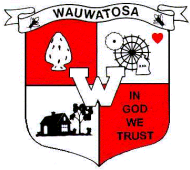
Signature / Name

Initials

Date



CITY OF WAUWATOSA  
MEMO



To: **Financial Affairs Committee**

From: **Alex Krutsch, Parks and Forestry Superintendent**

Date: **March 28, 2023**

Subject: **Memo from the Parks and Forestry Superintendent requesting a waiver of the request for proposal process and approval of a contract with JWIndustries for the installation of enclosed storage units under the West side spectator seating at Hart Park Stadium.**

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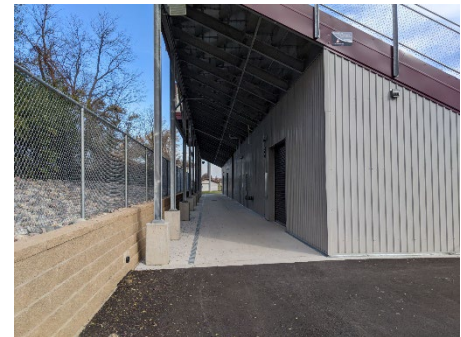
**A. Issue**

The Common Council has allocated \$175,000 of Capital Improvement Program (CIP) funds to be utilized for the installation of enclosed storage units underneath the spectator seating at Hart Park Stadium (CIP Project #8049). City staff is requesting approval of a contract not to exceed \$175,000 with JWIndustries (JWI) at this time (see attached quote).

**B. Background/Options**

The current spectator seating structures and press box at Hart Park Stadium were engineered and constructed by JWI in 2009. JWI was selected in 2009 because they are an industry leader in athletic facilities design and construction. JWI's construction methods for stadium bleachers allows for weathertight storage facilities under the spectator seating, utilizing what would otherwise be dead space. The need for additional storage at Hart Park Stadium was recognized in 2009 and JWI's solution was one of the reasons the firm was selected for the project. However, mainly due to funding considerations, the storage units were not built as part of the initial construction phase. Instead, the stadium was designed and constructed so that the storage enclosures could be a future addition.

The popularity and usage of Hart Park Stadium has grown since 2009 to include local area high schools, universities, semi-professional sports teams, and numerous local club leagues. Uses of the facility are as varied as the user groups and include lacrosse, field hockey, ultimate Frisbee, track and field, soccer, and football. Facilitating this diversity of athletic uses requires large amounts of equipment. Some of that equipment is supplied by Hart Park and some by user groups. The current lack of appropriate storage leaves equipment exposed to the elements and to vandalism. It also creates an unorganized facility in which there have been times ownership of equipment is unknown to parks staff, the public at large, and our user groups.



*Figure 1 Menomonee Falls Enclosure*

Because of their past experience with this facility and with similar projects such as the stadium at Tosa West High School, City staff is recommending entering into a construction contract with JWI

not to exceed \$175,000 and waiving of the request for proposal process. The proposed base price of \$168,100 is for the installation of 6 storage areas under the West side spectator seating area totaling 3,709 sq. feet of usable storage space. Each individual storage unit would be less than 1,000 sq. feet, per building code, and would include an over-head door for access. The proposal from JWI also includes the option to add a service door to each of the storage units at a cost of \$1,400 per door. Staff intends to work with community stakeholders to evaluate which units, if any, would benefit from the addition of a service door.



*Figure 2 Wauwatosa West Inside Enclosure*



*Figure 3 Sauk Prairie Enclosure*

### **C. Strategic Plan (Area of Focus)**

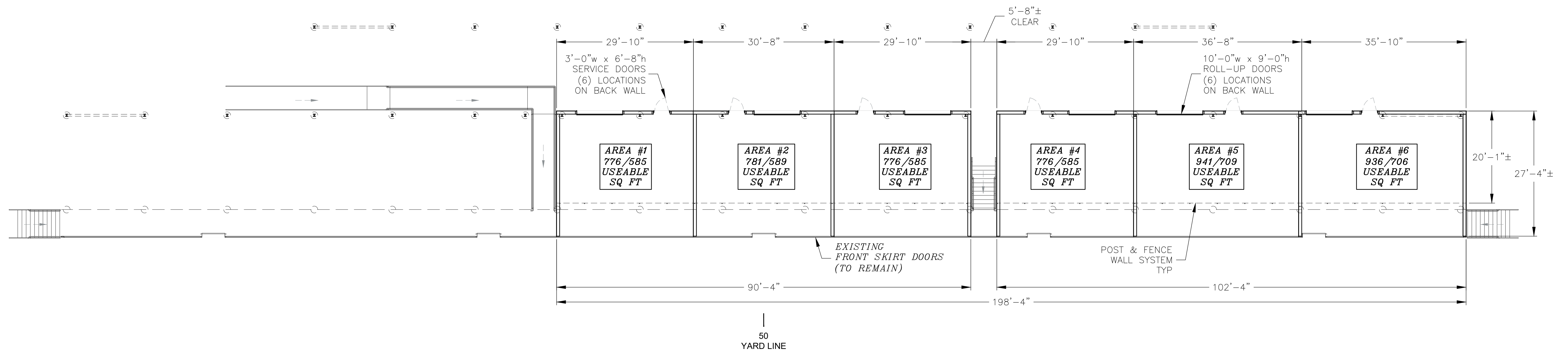
Priority 3: Infrastructure & Priority 5: Quality of Life

### **D. Fiscal Impact**

Contract with JWI not to exceed \$175,000 to be paid through allocated CIP funds for CIP Project #8049, for installation of storage units under the West side spectator seating area at Hart Park Stadium.

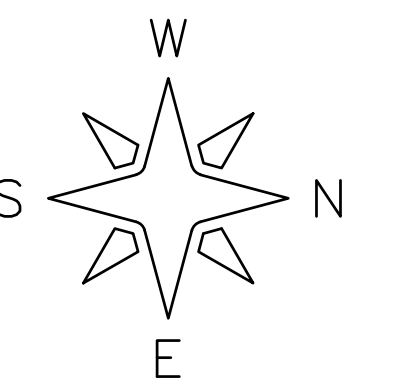
### **E. Recommendation**

Approval to waive the request for proposal process and approval of a contract with JWIndustries for the procurement and installation of six storage units under the West side spectator seating area at Hart Park Stadium as outlined in the attached proposal from JWIndustries in an amount not to exceed \$175,000.

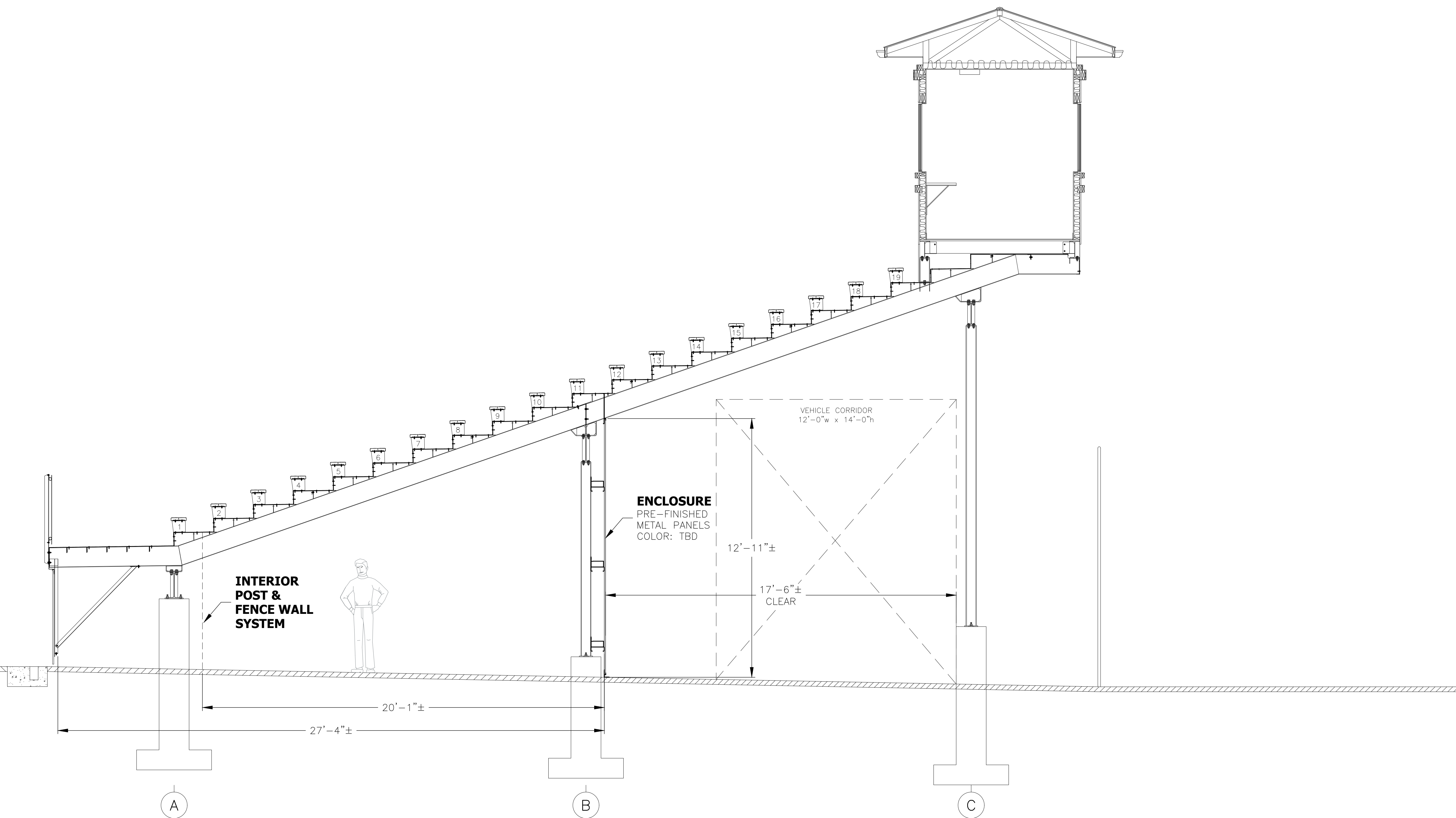


# WAUWATOSA (WI) HART PARK

## HOME SIDE ENCLOSURE SYSTEM



FOR PRESENTATION  
PURPOSES ONLY



## WAUWATOSA (WI) HART PARK

### HOME SIDE ENCLOSURE SECTION

FOR PRESENTATION  
PURPOSES ONLY





March 16, 2023

City of Wauwatosa  
7725 W. North Ave.  
Wauwatosa, WI 53213

Attention: Alex Krutsch – Parks & Forestry Superintendent

Regarding: Spectator Seating Enclosure System – West Side  
Hart Park Athletic Facility – Wauwatosa, WI  
JWI Quote #23-02-07AF (Rev 2)

We are pleased to provide our pricing for this upcoming project. Our proposal is based on an enclosure system under the spectator seating system installed by JWI in 2009, as well as the configuration and scope illustrated in the drawings provided. The following reiterates the items and scope of work we've included:

**Price #1:**

**West (Home) Side Enclosure System ----- \$168,100.00**

**Configuration**

- Encloses the area under the stadium, as indicated on the drawings
- (6) Areas totaling 3,709 sq. feet of “usable” storage space (4,986 sq. feet total space)
- Each enclosure is divided into spaces less than 1,000 sq. feet (building code mandated)
- Front walkway skirting with roll up doors already installed

**System Components**

- Galvanized framing system
- Pre-finished metal walls and trim – Color: TBD
- (6) Roll-up doors provided

**Option #1:**

**Addition of Service Doors in Enclosure Areas ----- \$1,400.00 (cost is per-door)**

**Configuration/Components**

- Up to (6) service doors could be added
- Includes framing and installation of doors

***Key Items:***

- Code Compliance
  - IBC 2015/ ICC 300/Wisconsin Building Code compliant
- Pricing subject to review after April 28<sup>th</sup>, 2023
- Warranty
  - Five years***
- Items included
  - Registered State of Wisconsin professional engineer review
  - State of WI or City of Tosa submittal process & fees
  - Component delivery to jobsite – Wauwatosa, WI
  - Field assembly / installation
  - Equipment to off-load
- Items ***not*** included
  - Grading, drainage, surface prep and hard surfacing under and around the enclosure
  - Lighting and build-out finishes within enclosure areas
  - Rental of high-lift equipment (provided by City of Tosa Parks)
  - Local permits and fees
  - Sales tax
  - Performance bond

If you should have any questions, please contact us at (414) 218-8805 Thank you.

J W INDUSTRIES, LLC

Mark Hans

Manager of Business Development

[markh@jwindustriesinc.com](mailto:markh@jwindustriesinc.com)



CITY OF WAUWATOSA  
MEMO

To: **Financial Affairs Committee**

From: **David Simpson, Director of Public Works & Bill Wehrley, City Engineer**

Date: **March 20, 2023**

Subject: **Consideration of approval of a consulting services contract with Graef for a water pumping station in the amount of \$476,888**

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**A. Issue**

The City's Common Council has allocated \$5.25 Million from American Rescue Plan Act (ARPA) funds for the design and construction of a secondary west zone water pumping station, CIP Project #5113. A request for proposals for design and construction management services was issued and a recommendation is being made for award of a contract at this time.

**B. Background/Options**

Wauwatosa owned water pumping stations currently receive water from Milwaukee Water Works and subsequently pump the water at an elevated pressure to homes, businesses, and elevated storage towers across the City. Pumping stations and elevated towers ensure that appropriate water pressure and volume are available throughout the City for residential, commercial, and firefighting efforts when necessary. The City of Wauwatosa's water utility provides service to two separate pressure districts, east and west. The eastern district utilizes three pumping stations and two elevated towers, while the western district only has one station and one tower available at this time. The lack of a secondary pumping station makes the western district extremely vulnerable to system wide failures if the water feeding the pumping station or the pumping station itself experiences a failure. If a systemwide failure were to occur and pressure within the system was reduced the lack of pressure would result in potential contamination to the drinking water supply as well severely limit the ability to provide water to combat fires. In order to protect the western pressure district's water customers a secondary pumping station is needed in order to provide backup to the existing primary station. The proposed secondary pumping station will be located adjacent to the Burleigh Water Tower. This pumping station will be sized in order to serve the entire western district so that if a failure occurs at the primary station no loss of service would occur.

A request for proposals for design & construction management services was issued for the water pumping station and two responses were received. While cost is not the determining factor in selecting the most qualified vendor to provide consulting work it is certainly an important factor. Below is a breakdown of the costs proposed for the work:

Consultant	Design Work Costs	Construction Management Costs
GRAEF	\$382,202.00	\$94,686.00
Baxter & Woodman	\$470,370.00	Not Provided

Proposals were reviewed by a panel of City staff members who analyzed many factors including cost, relevant experience, proposed timeline, references, qualifications of key staff, and project understanding. Based on all the data available to us we are recommending that we enter into a contract with GRAEF for a total fee not to exceed \$476,888. The Purchase Order would be issued with a base fee of \$382,202.00

with an “if authorized” fee of \$94,686.00 for construction management services if the project successfully moves forward to construction as anticipated. It is anticipated that this project will be put out for bids in early 2024 knowing that it includes long lead time items so actual construction will likely occur in 2025-2026.

**C. Strategic Plan (Area of Focus)**

Priority 2: Public Safety

Priority 3: Infrastructure

**D. Fiscal Impact**

The recommended contract with GRAEF will have a cost not to exceed \$476,888, which is within budget.

**E. Recommendation**

Authorize entering into a consulting services contract with GRAEF for design and construction management of a water pumping station in an amount not to exceed \$476,888.