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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*