



# VERIDIAN HOMES

*Dream. Build. Live.*

MADISON | MILWAUKEE

## PLAN COMMISSION CONSULTATION REQUEST

### WINTERBERRY RESERVE

Members of the Plan Commission,

Veridian Homes is excited to introduce to the City of Waukesha the conceptual framework for Winterberry Reserve, a proposed PUD overlay district on an approximately +/- 22.2-acre tract generally North and East of the Springs at Meadowbrook development. The proposed PUD overlay would allow for the creation of (49) traditional single-family homes, as well as (34) "carriage lane" homes, for a total of (83) single-family homes. We are excited to introduce the "carriage lane" concept to the City as an opportunity to bring home ownership to a diverse range of households. We invite you to review the enclosed materials and look forward to presenting and discussing this concept with you at the next Planning and Zoning Commission meeting.

Sincerely,

Benjamin Lang  
Acquisitions and Entitlements Specialist  
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#### Enclosures:

- Filled Application
- Location Map
- Site Plan
- Project Narrative
  1. About Us
  2. Property History and Comprehensive Plan
  3. Development Concept and Character
  4. Public Benefit Analysis
  5. Proposed PUD regulations
  6. Carriage Lane Details
- Updated Trip Generation Memo

# Project Narrative

## PLANNING COMMISSION CONSULTATION

### WINTERBERRY RESERVE

#### Contents:

1. About Us – Veridian Homes
2. Property History and Comprehensive Plan
3. Proposal Concept and Character
4. Public Benefit Analysis
5. Proposed PUD Regulations
6. Carriage Lane Details

## ABOUT US – VERIDIAN HOMES

Family owned and family driven, Veridian Homes has been helping families experience the joy, beauty, and fulfillment of homeownership for over 60 years. Rooted in Wisconsin, we wear our local heritage with pride and continue our commitment to building homes that are good for both the environment and people.

Our mission is to build homes that enrich lives and realize dreams, one home at a time. Realizing this mission requires us to put our customers first to realize their dreams. By approaching our work with this mission at heart, we have had the honor of earning some of the most prestigious awards in the home-building industry, bringing with us a locally and nationally recognized commitment to quality and craftsmanship in every neighborhood, and every home that we build.

WE DON'T BUILD GREAT  
HOMES TO WIN AWARDS.

*WE WIN AWARDS  
BECAUSE WE BUILD  
GREAT HOMES.*

### Recent Awards:

- 3x Gold Winner – National Housing Quality Awards
- Gold Winner – Best of Madison “Home Builders” – 4 of past 5 years
- 2023 FOCUS ON ENERGY® Trade Ally Contractor Excellence Award
- 2023 Avid® Benchmark Award – North Central U.S.
- 2022 Boys and Girls Clubs of Dane County® 2022 Hearts for Helping Community Impact Award
- 2021 Avid® Gold Award – North Central U.S.
- 2017 David Simon (Founder) inducted into National Housing Quality® Hall of Fame

## PROPERTY HISTORY AND COMPREHENSIVE PLAN

Continental 655 Fund LLC currently owns the subject parcel, the owner and developer of the Springs at Meadowbrook. In 2022, Continental petitioned for, and the City approved, a zoning amendment from “T-1” Temporary District to “RS-3” Single Family Residential District (up to 5.5 du/acre), accompanying this zoning approval a preliminary plat was approved for 54-lots averaging 0.32 acres per lot, and representing a density of ~2.4 du/acre. In January of 2024, the City of Waukesha adopted an updated Comprehensive Plan which designates the property as “MRC” Mixed Residential/Commercial, which allows for a “Mix of commercial and residential uses”.

Chapters 2 and 3 of the updated comprehensive plan discuss policies and goals of the City as it pertains to land use and housing. These sections acknowledge both the need for more housing development in the City, and the greatest threat to meeting the housing demand and needs of a growing and changing population; the limited resource of developable land within the City limits of Waukesha. In response, the comprehensive plan outlines certain policies and recommendations which, in summary, encourage; 1) higher density, quality housing development; 2) developers to include a higher proportion of smaller units in new construction and 3) construction of housing at a range of price points to meet demands of varying household types, sizes, and incomes. The relationship between the proposal, market demand, and public financial benefits are further explored in the project narrative section – “Public Benefit Analysis.”

## PROPOSAL CONCEPT AND CHARACTER

Veridian Homes is proposing a PUD overlay district for the subject property, to be known as Winterberry Reserve. Veridian takes pride in approaching each development project with three key guiding principles in mind: housing/architectural diversity, vibrancy, and sustainability.

### Housing Diversity:

Integrating housing options in differing formats and price points is integral to facilitating housing that meets the changing and diverse needs within any growing community. Within any of Veridian's neighborhoods we aim to serve a range of households; from first time homebuyers to move-up/semi-custom builds, to those families looking for downsizing/age in place options.

The proposed plan blends (49) Traditional (front-loaded garage) homesites with (34) Carriage Lane (rear-loaded garage served by private carriage lane) homesites. The proposed home mix is formulated to serve the needs of the community, which are further described in "Public Benefit Analysis – Housing Attainability." The mixture of Traditional Single-Family homes and Carriage Lane homes on this property, allows the proposal to balance the needs and demands of the community, while respecting the context and character of the neighborhoods amongst which it is sited.

The Traditional homesites are proposed to meet or exceed the typical standards within the RS-3 zoning district and line the perimeter of the plan. This will allow for a transition in scale and density across the neighborhood, while maintaining a character consistent with the context of the neighborhoods North and East of the proposed. Veridian's portfolio of plans available to build on these lots features a careful focus on porches and front doors to create interesting and walkable streetscapes. These homesites will support home plans over 1,400 SF for 1-story homes and ranging from 1,500 SF to >2,000SF (dependent on customer floorplan selections) within a 2-story home; each of which will feature a 2- or optional 3-car attached garage (on select homesites). These homesites will serve families looking for move-up or luxury home options.

The Carriage Lane homesites proposed are tucked into the center of the proposed street network. The Carriage Lane Homesites will all be owner occupied single-family residences,

similar in size and scale to the homes on the Traditional homesites. The Carriage Lane homesites will support home plans >1,200 SF for 1-story homes with 2-story options ranging from 1,500 SF to 2,100 SF; all of which will feature a 2-car attached garage that is simply rotated to the rear of the home, to allow for more efficiently planned lot/block layouts. The provision of the Carriage Lane homesites would not be allowed by RS-3 zoning, the proposed regulation modifications to allow this home type are outlined in the section "Proposed PUD Regulations."

Vibrancy:

In Veridian's neighborhoods vibrancy is created by using a keen eye to plan and site the distinctive styles of homes outlined above to create an interesting, diverse, and walkable street scape. An example of how Veridian guarantees this is its implementation of internal policies that prohibit monotonous planning and require unique home plan/elevation placement throughout any given block or streetscape. Architectural diversity and walkable, people-friendly streetscapes invite neighbors outside their homes resulting in an inherent sense of community. Additionally, all homes Veridian builds include driveway and foundation landscaping, to provide a truly turnkey experience for homeowners, while guaranteeing consistency and quality in the aesthetic makeup of the streetscape.

Sustainability:

Veridian approaches each of its neighborhoods with respect for the land and its natural features. We utilize energy efficient home designs and environmentally sound planning, building, and construction practices in commitment to stewardship of our lands. This is exemplified through our membership in Green Tier. In addition to environmental sustainability, our creative approach to planning and provision of diverse housing types buttresses economic sustainability within the communities we have the honor to build in. The section titled "Public Benefit Analysis" further illustrates ways this proposal may work to maintain and grow the economic sustainability of the City.

## PUBLIC BENEFIT ANALYSIS

The property in question is allowed to be developed as single-family “by right” based on the approved zoning and preliminary plat. However, the proposed PUD would allow the City and its residents to realize additional long-term benefits and progress towards the goals outlined in the comprehensive plan. The sections and figures below compare the development scenarios of the 54-homes approved in the preliminary plat and the proposed 83-home neighborhood as it pertains to City revenue generation and housing attainability.

### Assessed Value Analysis:

As discussed within the comprehensive plan, the City has a limited resource of developable land. The proposed development will help the City to maximize the assessed value per acre of the subject property while keeping the amount of infrastructure required to serve the community nearly constant given the roadway and utility network would not need to be dramatically lengthened to serve the additional proposed homes. The Carriage Lane Homesites would be served by a private lane, managed, and maintained by a Homeowner’s Association, limiting additional strain on City services, see section “Carriage Lane Details” for further description. Table 1 illustrates the estimated assessed value of both development scenarios upon completion.

Table 1 - Assessed Value Upon Completion

Plan	Homesites	Estimated Assessed Value	Value Per Acre
Preliminary Plat	54	\$ 24,653,601.3	\$ 1,110,212.52
Proposed	83	\$ 36,546,784.2	\$ 1,645,791.91
Change	29	\$ 11,893,182.89	\$ 535,579.38
Percent Increase		48.24%	48.24%

In addition to the increase in annual tax revenues, the City and the Water Utility may benefit from the additional influx of one-time permitting and impact fee generation to help fund upcoming capital improvements. The City and Water Utility charge approximately \$7,900 per single residence in combined impact, service, permit, and inspection fees. The addition

of twenty-nine homesites would increase the one-time fee generation of this property by about \$229,000.

Housing Attainability:

The housing needs assessment completed by The City of Waukesha and Vierbicher in 2019 (updated in 2023) identifies a substantial demand for housing units attainable to households making over \$75,000, with the highest demand being in the \$100,000 to \$149,000 household income range. For a home to be attainable, regardless of the type of home, the average monthly housing expenditure of a household must be less than 30% of their income. The monthly cost of a single-family home is dependent on downpayment – Table 2 below converts attainable monthly payments to single-family purchasing power, assuming two scenarios 1) 6% interest rate with a 5% down payment, and 2) 6% interest rate with a 20% downpayment.

Table 2 - Attainable Purchasing Power

Income Range	Owner Occupied HH in income range*	Attainable Monthly Housing Cost*	Owner Occupied units in attainable range*	Balance*	Attainable home price (5% down, 6% interest)	Attainable home price (20% down, 6% interest)
\$50,000 - \$74,999	3,260	\$1,250 - \$1,874	6,426	3,166	\$160,000 - \$244,000	\$204,000 - \$311,000
\$75,000 - \$99,999	3,057	\$1,875-\$2,499	1,963	-1,094	\$245,000 - \$328,000	\$312,000 - \$419,000
\$100,000 - \$149,000	4,088	\$2,500-\$3,749	667	-3,421	\$329,000 - \$498,000	\$420,000 - \$634,000
\$150,000 +	2,280	\$3,750+	63	-2,217	\$499,000+	\$635,000+

\*Data per City of Waukesha Housing and Needs Assessment

\*\*Attainable home price includes Mortgage, property tax, insurance, and PMI for <20% downpayment scenario

Table 2 above indicates a substantial need for homes priced less than \$500k in the City of Waukesha. The average new home list price in the Waukesha School District in September



was over \$700k. The Section “Proposal Concept and Character” describes Veridian’s approach to programming its neighborhoods, and a commitment to providing a diverse range of housing types that meet the changing needs of a community’s residents. With the introduction of Carriage Lane product, the proposal can offer a share of homesites that would support homes priced to be attainable for those households making \$100-150k per year. A marked need in the community.

Table 3 illustrates the potential completed home sales prices for the proposed 83-home development scenario. The 54-lot development scenario would not support ANY homes priced below \$500k, with proposed sales prices starting in the mid \$550k’s.

Table 3 - Proposed Home Pricing

Lot Type	QTY	% Mix	Floorplan SF	Proposed Price
Carriage Lane Homesites	34	41%	1,520 - 2,061	\$460,000 - \$534,000
Traditional Single Family Homesites	49	59%	1,577 - 2,060+	\$513,000 - \$558,000
Total	83	100%		\$543,000 Average

Notes:

- 41% of lots will support a home priced to meet affordability criteria for HH making \$100k - \$149k or >\$150k with 5% downpayment
- 100% of lots will support a home priced to meet affordability criteria for a HH making \$100k-\$149k or >\$150k with >20% downpayment
- Proposed home prices do not include custom selections or upgrades available.

## PROPOSED PUD REGULATIONS

### Description

Carriage lane homes enhance the variety of housing and neighborhood character through the use of single-family home sites served by alleys. These homes are designed with integrated architecture and reduced setbacks which create a rhythm of front façades of houses without garages that emphasize a human-based scale and texture in which the pedestrian and front porches become the focus. Proposed regulations and amendments to ordinances are described below and in Table 4 on the following page.

Proposed Carriage Home Dwelling Units: 34 units

### CHARACTER GUIDELINES – CARRIAGE LANE HOME SITES

- Balconies, entry bays and front entry porches are recommended to enhance the human scale of the public street façade.
- Porches, stoops, and bays are allowed to encroach into the front yard setback to allow for increased porch width and to encourage the inclusion of porches or entry bays onto each house.
- Varied building setbacks are encouraged to create a more organic streetscape in which there are varied building placements along the length of the street.
- As the buildings are moved closer to the street and each other, special attention should be taken.  
to design details, house details, and landscaping to ensure that the public street façade is of proper pedestrian scale.

TABLE 4 – PROPOSED PUD REGULATIONS

REGULATION	RS-3 (BASE ZONING)	TRADITIONAL HOMESITES	CARRIAGE LANE HOMESITES
Minimum Lot Area	8,000 square feet	8,000 square feet	<b><u>4,000 square feet -</u></b>
Minimum Lot Width at Front Yard Setback	65 feet	65 feet	<b><u>37 feet</u></b>
Minimum Lot Depth	N/A	N/A	<b><u>110 feet</u></b>
Minimum Front Yard Setback	25 feet (Street Setback)	25 feet	<b><u>20-25 feet</u></b>
Minimum Side Yard Setback	10 feet	10 feet	<b><u>5 feet</u></b>
Minimum Corner Lot Side Yard Setback	25 feet (Street Setback)	25 feet from the street side right of way	25 feet from the street side right of way
Minimum Rear Yard Setback	40 feet	40 feet	<b><u>5 feet to attached garage</u></b>
Maximum Building Height	40 feet	40 feet	40 feet
Required Off-street Parking and Loading	Two off-street parking stalls per lot	Two off-street parking stalls per lot	Two off-street parking stalls per lot
Minimum Floor Area (1-story)	1,000 square feet	<b><u>1,400 square feet</u></b>	<b><u>1,200 square feet</u></b>
Minimum Floor Area (2-story)	1,800 square feet	<b><u>1,500 square feet</u></b>	<b><u>1,500 square feet</u></b>

Proposed ordinance modifications are **BOLDED & UNDERLINED**

## CARRIAGE LANE DETAILS

### Description

Carriage lane homes enhance the variety of housing and neighborhood character by incorporating single-family home sites served by alleys. By utilizing a rear facing garage, it allows for a similar size home on a narrower lot, which appeals to a variety of household types including, but not limited to, cost conscious new home buyers, those looking to attain home ownership without the demands of a large yard, or those looking to downsize into a smaller more manageable home. The alleys which serve the garages are proposed to be privately maintained and managed by a homeowner's association. The series of figures on the following pages articulate the design and functionality of these Carriage Lane homesites and the private alley configuration.

Figure 1 – Character Imagery of Carriage Lane Home Architecture



Figure 2 – Carriage Homesite – Lot Fit Diagram

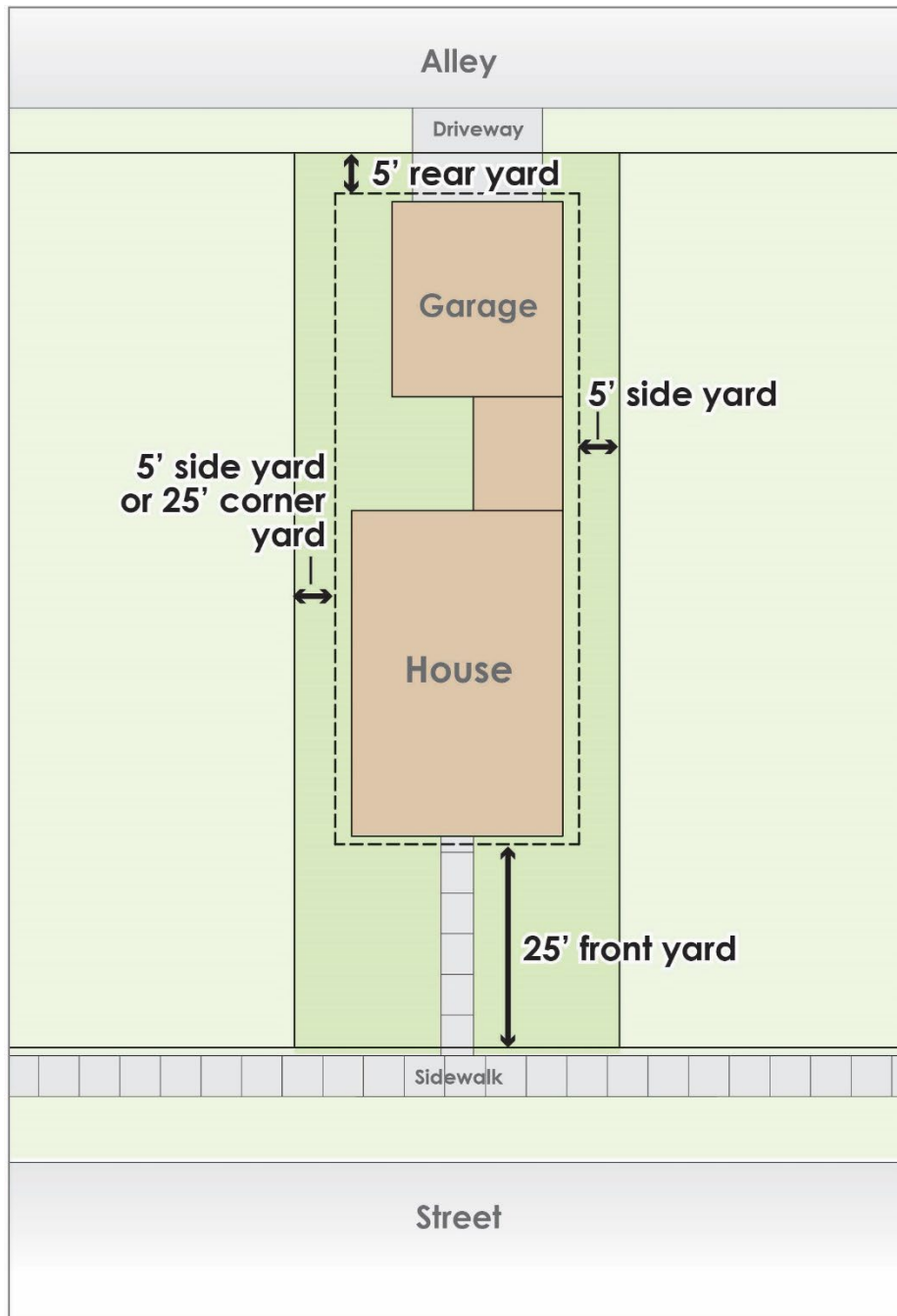


Figure 3 – Alley Cross-Section

