

Winterberry Reserve Waukesha, Wisconsin

REZONING/ PLANNED UNIT DEVELOPMENT
AND PRELIMINARY PLAT SUBMITTAL

SUBMITTED: JANUARY 27, 2025



VERIDIAN
HOMES

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PROJECT INFORMATION



INTENT OF DOCUMENT

The intent of this document is to provide the City of Waukesha with a rezoning submittal for RS-3 Single Family Residential and Planned Development Overlay that summarizes the components of the proposed Winterberry Reserve Neighborhood.

PROJECT NAME

Winterberry Reserve

PROJECT OWNERS

Continental 665 Fund LLC
W134N8675 Executive Parkway
Menomonee Falls, WI 53051

CONTACTS

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EXISTING CONDITIONS

Existing Zoning:	RS-3
Existing Parcels:	0 Summit Avenue
Parcel ID:	WAKC0991003
Lot Area:	22.21 acres
Comprehensive Plan:	Medium Density Residential

REQUEST

Request 1: Rezone property from RS-3 Single Family Residential to RS-3 Single Family Residential with a Residential Planned Development (PUD) Overlay.

Request 2: Approve a Preliminary Plat containing 79-single family lots consistent with the PUD standards described herein.

Project Timeline

Neighborhood Meeting	October 28, 2024
Staff Pre-Application Meeting	November 5, 2024
Plan Commission Consultation #1	November 20, 2024
Plan Commission Consultation #2	December 18, 2024

Proposed Construction Timeline

Zoning & Plat approvals	February-March 2025
Construction Start	May 2025
Substantial Completion	2027

Zoning Request Justification

The Residential Planned Development District is established to permit development that will, over a period of time, be enhanced by coordinated area site planning and diversified location of structures, building heights, & types. The design of The Winterberry Reserve Neighborhood, facilitated by the PUD zoning overlay, seeks to create housing diversity within the framework of a master planned community that offers a wide range of housing formats and price points. The range of formats and price points provides housing choices for a diverse set of buyers seeking the following options; first time home-buyer options, move-up, luxury, and down-size options.

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 proposed PUD overlay has been formulated to specifically address these three goals.

WHY PLANNED UNIT DEVELOPMENT?

Using sound planning and design principles, the Winterberry Reserve site concept will expand housing options in Waukesha by a creating broad range of housing formats and price points within a cohesive and vibrant new neighborhood, which would not be permitted by base zoning districts.

The Planned Unit Development (PUD) zoning district is the most appropriate zoning approach for the Winterberry Reserve site, as it allows for the comprehensive planning and design of the multifaceted project. The PUD process will also benefit the City of Waukesha in that it will maximize the opportunities for review and input into the planning process, implement community goals, offer housing diversity in price and format, and create a unique and vibrant neighborhood.

DEVELOPMENT CHARACTER

Single family homes within the project will include both carriage lane accessed, and street accessed configuration (Traditional Single-Family) that accommodate a wide range of house types, architectural treatments, landscaping, floor plans and price points. This will create an integrated and diverse neighborhood that also blends easily into the surrounding neighborhoods. Price points within the single-family format will range from entry level/first time home buyer to move up/missing middle to luxury housing options.

Proposed Land Use Summary

- 34 Carriage Lane Accessed Single-Family Homes
- 45 Traditional Street Accessed Single-Family Homes



ECONOMIC BENEFIT

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 – when compared to the approved 54-lot preliminary plat. The Carriage Lane Homesites would be served by a private lane which would be managed and maintained by a Homeowner’s Association, limiting additional strain on City services. 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	79	\$ 34,736,133.26	\$ 1,564,253.82
Change	29	\$ 10,082,531.90	\$ 454,041.30
Percent Increase		40.90%	40.90%

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 \$9,980 per single residence in combined impact, service, permit, and inspection fees. The addition of twenty-five homesites would increase the one-time fee generation of this property by about \$249,525.

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 considered attainable, by generally accepted financial standards, 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 greatly influenced by 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 2024 was over \$700k. 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.

(Attainability Analysis continued next page)

Table 3 illustrates the potential completed home sales prices for the proposed 79-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 with average pricing being much closer to the current market average of >\$700k.

Table 3 - Proposed Home Pricing

Lot Type	QTY	% Mix	Floorplan SF	Proposed Price
Carriage Lane Homesites	34	43%	1,520 - 2,061	\$460,000 - \$534,000
Traditional Single Family Homesites	45	57%	1,577 - 2,060+	>\$513,000
Total	79	100%		\$584,339 Average

Notes:

- 43% of lots will support a home priced to meet affordability criteria for HH making \$100k - \$149k or >\$150k with 5% downpayment
- 68% 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.

PUD: ZONING TEXT

OVERLAY OF PLANNED DEVELOPMENT

All provisions of Waukesha Municipal Code 22.26, RS-3 Single Family Residential District, shall apply in all respects to the Site, except as specifically modified by this agreement or Waukesha Municipal Code 22.52.

DESCRIPTION OF DEVELOPMENT

79 Single-Family Homes

ALLOWED DEVIATIONS FROM ZONING:

The following districts outline the standards for the single-family formats (Traditional and carriage lane accessed).

Variances requested include:

Minimum Lot Width

Lot Area

Street Setback

Rear Yard Setback

Side Yard Setback

Minimum Dwelling Size

Allowance of Permanent Monument Sign – See Exhibit F

WINTERBERRY RESERVE: DISTRICT I

Single Family Homes

Street Accessed Garages

Description

This district’s homes offer additional diversity and housing choices in a single-family format. Traditional single-family homes within the neighborhood will span from entry level/first time homebuyer, to luxury, and downsizer opportunities.

Proposed Dwelling Units 45 units



Character Guidelines

- 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.
- 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.
- The front entry of each house should be oriented towards the public street frontage.
- Garages will be set back a minimum of two feet from the front façade of the house to ensure that the garage does not dominate the façade of the house
- Monotonous streetscapes shall be avoided by requiring that each unique floorplan/elevation combination be used only once per each (7) adjacent homes sharing the same public ROW.



DISTRICT 1 ZONING TEXT

Lot Area and Width

Minimum Lot Area	8,000 Square Feet
Minimum Lot Width	69'
at Front Yard Setback	
Minimum Corner Lot Width	94'
at Front Yard Setback	

Building Height and Area

Maximum Building Height	40'
Minimum Floor Area	1,400 square feet.
Minimum first floor (2 story building)	800 square feet

Setbacks and Yard

Minimum Street Yard Setback	25'
Minimum Side Yard Setback	10'
Minimum Rear Yard Setback	40'
Garage Setback	Street Facing Garages 27' Side Entry Garages 25' Street facing garages must be setback a minimum of 2' from front façade of the house Side entry garages may be allowed in front of primary façade but must have a minimum of 15% of the façade featuring architectural details consistent with the features of the living portion of the home (windows, door design, trim detail, materials). There shall not be more than (2) single car width and (1) double car width garage doors per street facing elevation. On street facing facades with a three-stall garage, one single width door must be setback on a new façade

Minimum Driveway Setback

2'

Minimum Off-Street Parking

(4) off-street parking stalls per lot

A minimum of (2) off-street parking stalls shall be contained within an attached garage.

Permitted Encroachments

Roof eaves may encroach up to 1' into the side yard setback.

WINTERBERRY RESERVE: DISTRICT II

Single Family Homes

Carriage Lane Alley Accessed Garage

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 streetscapes unbroken by driveways or garages and that emphasize a human-based scale and texture in which the pedestrian and front porches become the focus.

Proposed Dwelling Units 34 units

Character Guidelines

- 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.
- 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.
- Monotonous streetscapes shall be avoided by requiring that each unique floorplan/elevation combination be used only once per each (7) adjacent homes sharing the same public ROW.



DISTRICT 2 ZONING TEXT

Lot Area and Width

Minimum Lot Area	4,400 Square Feet
Minimum Lot Width	40'
at Front Yard Setback	
Minimum Corner Lot Width	55'
at Front Yard Setback	

Building Height and Area

Maximum Building Height	40'
Minimum Floor Area	1,200 square feet.
Minimum first floor (2 story building)	750 square feet

Setbacks and Yard

Minimum Street Yard Setback	15'
Minimum Side Yard Setback	5'
Minimum Building Separation	10'
<i>(Separation measured foundation to foundation)</i>	
Minimum Rear Yard Setback	18'
Minimum Driveway Setback	2'

Minimum Off-Street Parking

(4) off-street parking stalls per lot
A minimum of (2) off-street parking stalls shall be contained within an attached garage.

Permitted Encroachments

Unenclosed porches may encroach up to 3' into the front yard setback.
Roof eaves may encroach up to 1' into the side yard setback.

GENERAL PROJECT COMPONENTS

ARCHITECTURAL STANDARDS

The Winterberry Reserve neighborhood will have an Architectural Review Committee established via recorded CCR's prior to Development of the property. Building plans will require review and approval by the Architectural Review Committee for Winterberry Reserve prior to submittal to the City of Waukesha.

The following additional guidelines will also apply:

Massing

- Awnings, bays, canopies, porches, stoops, towers and windows are encouraged to enhance the building scale.
- Primary façade rooflines are encouraged to be broken with bays, gables, and smaller roof forms to reduce the overall size of roof elements. Pitched or flat roof forms may be allowed, as appropriate to the overall style of the building.
- Building architecture should utilize a tripartite composition with base, middle, and top elements clearly defined with material and façade design changes.
- Façade breaks and wall recessions shall be used to further break up building masses.

Styles

- Each individual building shall select one style of architecture and apply appropriate details, massing, rooflines, façade breaks, colors, and materials on all of the buildings within the project. Using a variety of architectural styles throughout the neighborhood will create more visual interest and appeal. The buildings should contain variations in materials and colors between buildings to enhance the overall character of the site.
- Appropriate Styles:
 - Victorian
 - Salt Box
 - Prairie
 - Cottage
 - Four Square
 - Traditional
 - Southern Traditional
 - Shingle
 - Craftsman
 - Mid-Century Modern

Materials

- Building design shall feature high quality, durable materials in a range of types and colors.

- Appropriate materials:
 - Brick
 - Stone and cast stone
 - Cement board, composite siding, or vinyl siding
 - Wood, composite, vinyl, or cement board shingle siding/ board and batten siding
 - Metal panels
 - Synthetic trim materials

Encroachments

- Terraces, steps, uncovered and covered front porches, decks, stoops, or similar appurtenances to residential buildings which do not extend above the floor level of the adjacent building entrance may encroach a maximum of 3’ into the front yard setback.
- At grade patios may encroach up to the paved side yard setback allowance.
- Decks may encroach up to 10’ into rear yard setback.
- Garden walls or fences shall be no more than 4’ in height and will require approval by the Architectural Control Committee. Walls and fences located within the vision triangle shall not exceed 30” in height.

MAILBOXES

Per United States Postal Service requirements, cluster mailboxes will be used and placed throughout the neighborhood in private easements or private outlots. The final locations and signing will be determined on phase by phase basis.

The Home Owners Association will be responsible for the maintenance of the CBUs.

HOMEOWNER ASSOCIATION

Winterberry Reserve will be governed by a Homeowners Association. Maintenance responsibilities will be further detailed in the amended covenants and restrictions recorded against each property. Notably, the private alley which serves the Carriage Lane homes will be owned and maintained by the Homeowners Association. The Homeowners Association will also be responsible for maintenance costs and obligations required by the recorded Declaration of Easements Covenants and Restrictions, which establishes shared maintenance responsibilities for shared improvements between the Springs at Meadowbrook and Winterberry Reserve – most notably, the shared stormwater facilities.

ARCHITECTURAL REVIEW COMMITTEE

The Architectural Review Committee and The Winterberry Reserve Covenants and Restrictions Code will be set up to ensure the continued development of high-quality design, architecture and site execution is carried throughout the neighborhood.

Architectural and Landscape plans for any site within Winterberry Reserve shall be submitted to the Architectural Review Committee for review and approval prior to the issuance of any Building Permit, or prior to any site improvements.

The Committee will review all submitted plans to ensure the continuation of the distinct architectural character, and landscape quality established within the development. Plans will be reviewed based on the design guidelines as established in the Covenants and Restrictions guide and standards outlined for each zoning district. The Committee will review any future remodeling plans that will change the outward appearance of any structure found within Winterberry Reserve. The Committee will not review any re-landscaping plans that take place more than one year after the original landscape plan is installed.

The Committee has the right to enforce all design guidelines and standards found within the Covenants and Restrictions, Design Guidelines, or zoning text. The Committee also retains the right to grant exceptions to the design guidelines and standards based on the merit of exceptional design that may not fall within or meet the technical requirements of the guidelines and standards, but generally accomplished the basic principles and intent of the aforementioned documents. Exceptions may also be made on a case-by-case evaluation of individual site context issues that would inhibit the practical implementation of these guidelines and standards.

The Architectural Review Committee shall initially be appointed by the Developer, and references in this Zoning Text to the Architectural Review Committee shall mean the Developer for such period of time as the Developer remains the only member of the Architectural Review Committee as provided in the Association Bylaws. As long as the Developer is the only member of the Architectural Review Committee, the Developer, acting alone, may exercise all of the rights and ceases to be the sole member of the Architectural Review Committee, the Architectural Review Committee shall thereafter consist of such persons as are elected pursuant to the Bylaws.

EXHIBITS

- Exhibit A:** Legal Description
- Exhibit B:** Zoning District Comparison
- Exhibit C:** Comprehensive Plan
- Exhibit D:** Location Map
- Exhibit E:** Master Plan
- Exhibit F:** Conceptual Signage Rendering

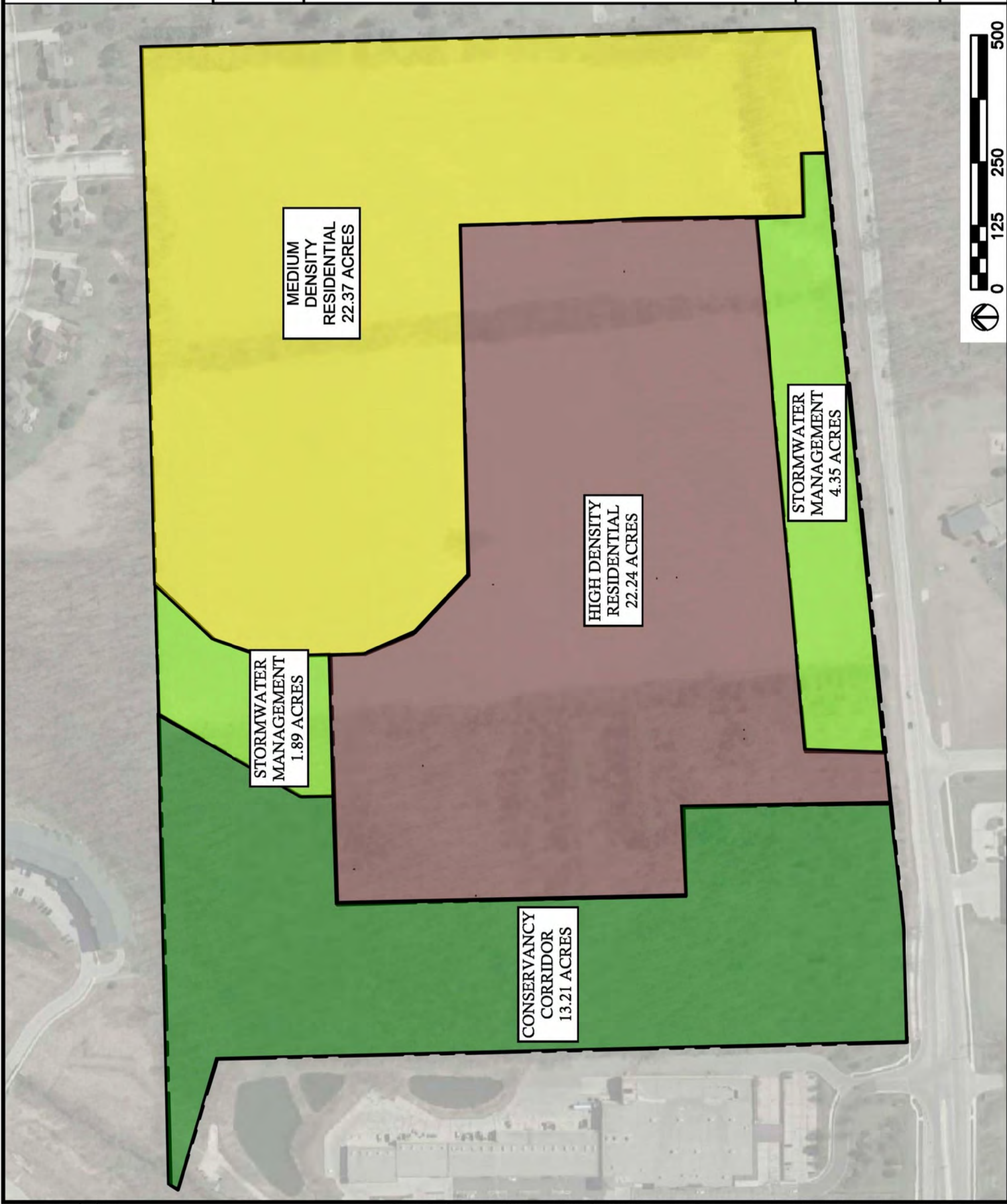
Exhibit A: Legal Description

Lot Two (2), CERTIFIED SURVEY MAP NO. 12535, recorded in the Office of the Register of Deeds for Waukesha County, Wisconsin on February 13, 2024 in Volume 130, Page 222 as Document No. 4755028, said certified survey map being a part of the Northeast 1/4, Southeast 1/4, Southwest 1/4 and Northwest 1/4 of the Southwest 1/4 of Section 32, Township 7 North, Range 19 East, in the City of Waukesha, Waukesha County, Wisconsin.

Exhibit C: Zoning District Comparison

<u>RS-3: (District I: Traditional Single Family)</u>	<u>Standard</u>	<u>Proposed</u>
Land Use	Single Family	Single Family
Lot Area and Width		
Minimum Lot Area	8,000	8,000
Minimum Lot Width at Front Yard Setback	65'	69'
Minimum Corner Lot Width at Front Yard Setback	75'	94'
Building Height and Area		
Maximum Height	40'	40'
Minimum Floor Area	1,000 sq. ft.	1,400 sq. ft.
Minimum first floor (2 story building)	800 sq. ft.	800 sq. ft.
Setbacks and Yard		
Minimum Street Setback	25'	25'
Minimum Side Yard Setback	10'	10'
Minimum Rear Yard Setback	40'	40'
Minimum Off-Street Parking Stalls	4	4
<u>RS-3: (District II: Alley Accessed Single Family)</u>	<u>Standard</u>	<u>Proposed</u>
Land Use	Single Family	Single Family
Lot Area and Width		
Minimum Lot Area	8,000	4,400
Minimum Lot Width at Front Yard Setback	65'	40'
Minimum Corner Lot Width at Front Yard Setback	75'	55'
Building Height and Area		
Maximum Height	40'	40'
Minimum Floor Area	1,000	1,200
Minimum first floor (2 story building)	800	750
Setbacks and Yard		
Minimum Street Setback	25'	15'

Minimum Side Yard Setback	10'	5'
Minimum Rear Yard Setback	40'	18'
Minimum Off-Street Parking Stalls	4	4



MEDIUM
DENSITY
RESIDENTIAL
22.37 ACRES

HIGH DENSITY
RESIDENTIAL
22.24 ACRES

STORMWATER
MANAGEMENT
1.89 ACRES

STORMWATER
MANAGEMENT
4.35 ACRES

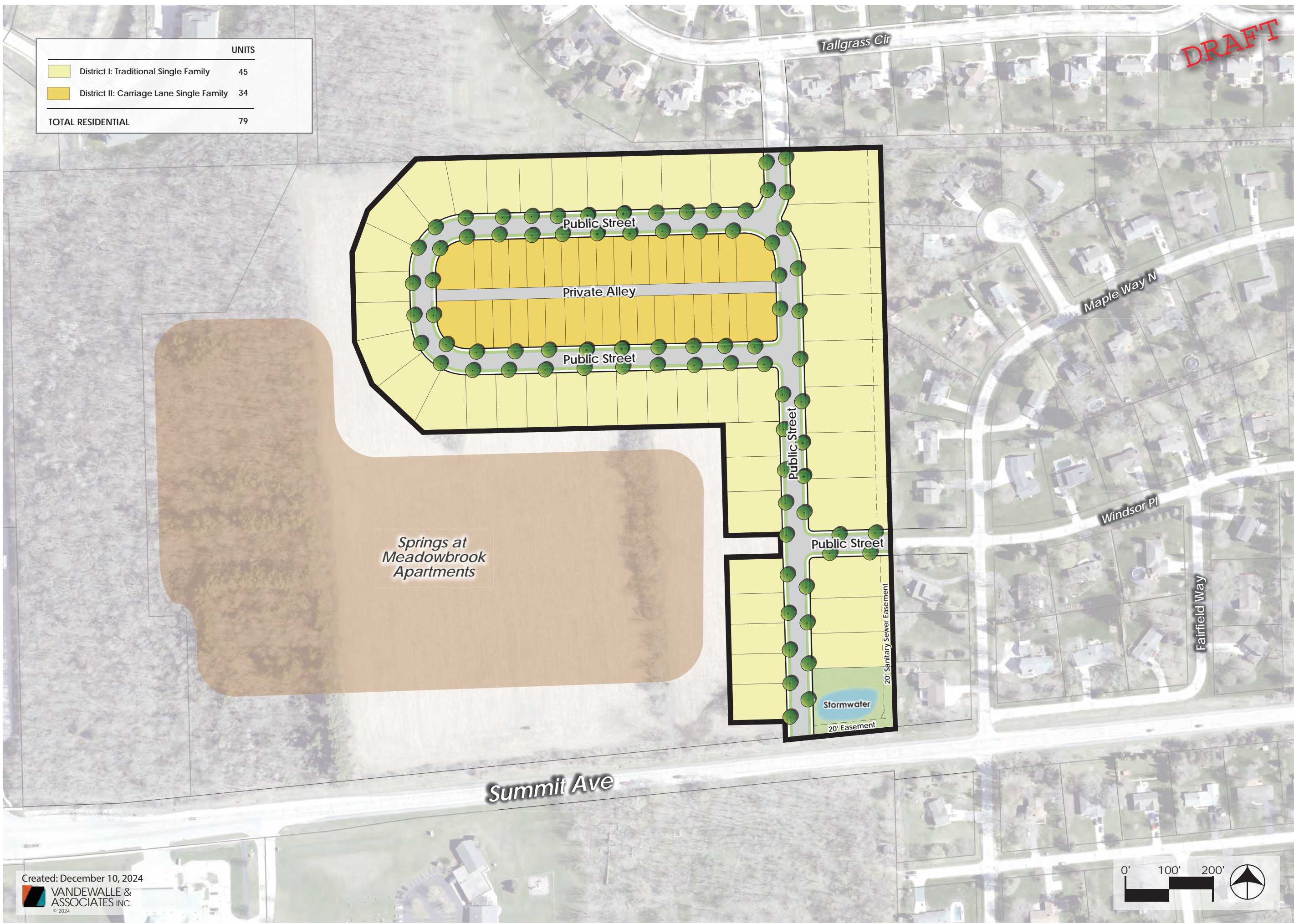
CONSERVANCY
CORRIDOR
13.21 ACRES



DRAFT



UNITS	
District I: Traditional Single Family	45
District II: Carriage Lane Single Family	34
TOTAL RESIDENTIAL	79



WINTERBERRY RESERVE
Waukesha, Wisconsin

ILLUSTRATIVE
PLAN



WINTERBERRY RESERVE #5

FRONT VIEW

SIDE VIEW

