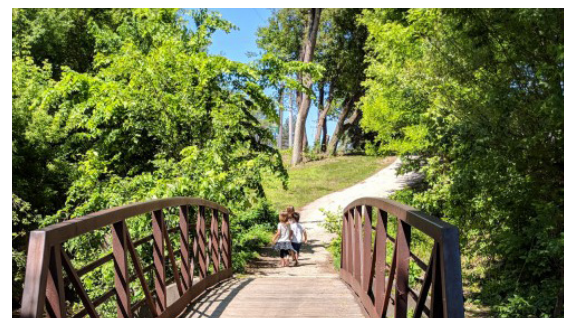


City of Waukesha, Wisconsin

Zoning Code Update

Proposal

October 2, 2023



Birchline Planning LLC
Great Waters + Great Communities

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October 2, 2023

Jennifer Andrews, Director
Charlie Griffith, Associate Planner
201 Delafield Street
Waukesha, WI 53188-3633

Attn: Jennifer Andrews and Charlie Griffith

Houseal Lavigne and **Birchline Planning** are pleased to submit our proposal for the Zoning Code Update for the City of Waukesha. Our experience with the preparation of zoning, subdivision, and sign ordinance rewrites and updates for communities throughout the country and in Wisconsin makes us uniquely qualified to assist the City with this important project.

Houseal Lavigne is an award-winning, innovation-based consulting firm. Founded in 2004, Houseal Lavigne has distinguished itself as an industry leader in technology and innovation and is recognized nationally for its, outreach, plans, ordinances, and graphics. Houseal Lavigne has worked with more than 400 communities across the country and has unparalleled experience in a wide variety of zoning, planning, and design projects. In addition, our experience working in Wisconsin with communities such as Oak Creek, Franklin, Verona, Eau Claire, Oshkosh, Fond du Lac, and Milwaukee provide our firm with the experience needed to navigate and be responsive to regional and state specific trends and requirements.

Birchline Planning is a woman-owned small business that provides public and private sector clients with the tools to create healthy waters and thriving communities through expertise in authoring regulations for water resources. Working in partnership with other outstanding professionals, firms and organizations, Birchline Planning has helped clients throughout the US and eastern Canada with zoning code and design manual updates including both comprehensive overhauls or specific topic or issue efforts. Birchline Planning's experience working with other Wisconsin communities and institutions including Franklin, Bayfield, Superior, Green Bay, Madison, the Milwaukee Metropolitan Sewerage District, and University of Wisconsin Madison makes the firm uniquely qualified to assist the City of Waukesha in updating its code to reach its environmental goals.

Through Houseal Lavigne's award-winning graphic communication, we develop community-driven processes and regulations that are clear, concise, user-friendly, effective, easy to administer, and responsive to community issues and aspirations. Our illustrations, tables, flowcharts, diagrams, and 3D visualizations have the ability to clearly detail every aspect of a code, including bulk and site standards, development standards, use provisions, administrative procedures, and definitions, so that residents, builders, and developers can understand the intent of regulations, and staff, appointed officials, and elected leaders can interpret and administer the ordinance consistently.

Our project team consists of planning professionals with extensive experience in rewriting, updating, and administering land development regulations. Our team has the experience needed to ensure that Waukesha's updated code effectively balances the desires and vision of the community with the realities of the market and what it takes to get good development done.

We appreciate the opportunity to submit our approach for this important project and look forward to the prospect of working with you and the entire Waukesha team. 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', written over a light blue horizontal line.

John Houseal, FAICP

Partner | Co-Founder
Houseal Lavigne

(312) 372-1008 ext. 101
188 West Randolph Street, Chicago, IL 60601
jhouseal@hlplanning.com

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SECTION 1

FIRM QUALIFICATIONS

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Firm Information

Our team for the Waukesha Zoning Code Update is made up of professionals with specialized expertise in all areas of zoning and land use control. Our team has been specifically assembled to provide Waukesha with a responsive, effective, and user friendly Zoning Code. We will approach this project by leveraging our collective expertise and diversity of experience, working closely and collaboratively with City staff to provide a Waukesha with a modern code that aligns with the community's in-progress Comprehensive Plan.

Partnership with ESRI

Houseal Lavigne is an Esri Business Partner, giving our team access to a variety of cutting-edge technologies and programs. This relationship has allowed our firm to explore how technology can support a data-driven and visually compelling approach to planning. Further, it has given Houseal Lavigne the opportunity to work with Esri in shaping best practices and defining how their services can be better integrated within the planning profession.



Houseal Lavigne

188 West Randolph Street, Chicago, IL 60601

Houseal Lavigne is urban planning, design, and geospatial solutions firm focused on powering the art of planning with science and technology. Over the years we have focused on leveraging new technologies to deliver evidence-based decision-making along with geographically compelling and effective storytelling. We pride ourselves on creativity, collaboration, and critical thinking. Our team is built on strong relationships, the exchange of ideas, and a commitment to innovation. Our priorities are to do good, work smart, have fun, and provide visionary, responsive, and viable solutions to our clients and partners.



Birchline Planning LLC
Great Waters + Great Communities

Birchline Planning LLC

2127 Tartan Court, Wheaton, IL 60187

Birchline Planning LLC is a woman-owned small business. For 25 years Juli Beth Hinds, AICP, Birchline Planning's founder and Principal, has provided public and private-sector clients with unique and effective leadership and expertise in land use planning, water resources, program development, financial management, and public communications. Working in partnership with other outstanding professionals, firms and organizations, Birchline Planning has helped clients throughout the US and eastern Canada.



Services

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

Office Locations

Chicago Office (Primary)
188 West Randolph Street, Suite 200
Chicago, IL 60601

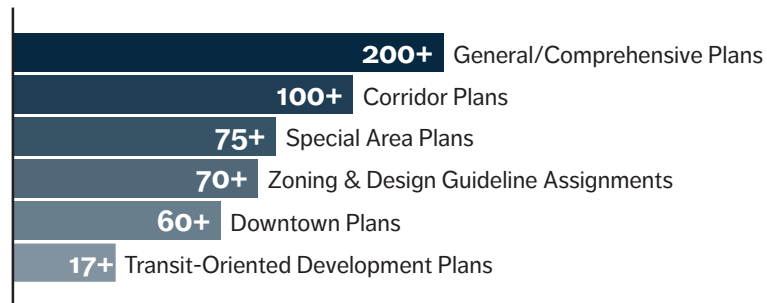
Los Angeles Office
360 E 2nd Street, Suite #800
Los Angeles, CA 90012

Seattle Office
999 3rd Ave, Suite #700
Seattle, WA 98104

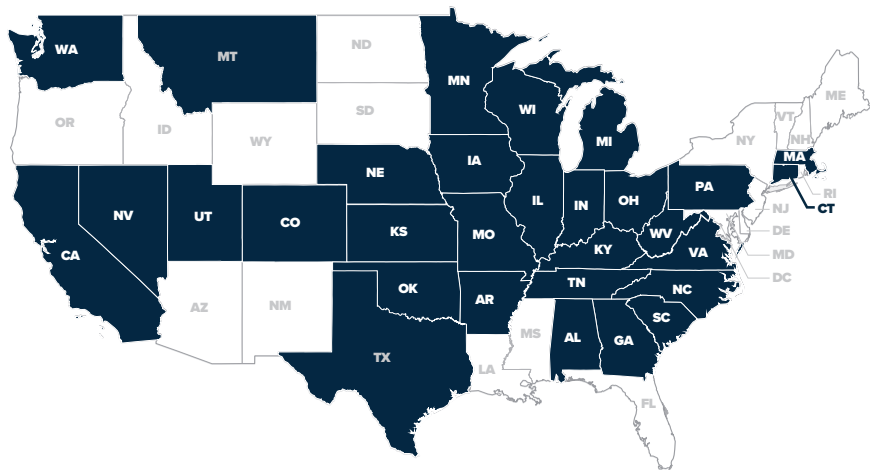
Firm History

Houseal Lavigne was founded in 2004 by John Houseal and Devin Lavigne. Despite a sluggish national economy beginning just years after our founding, Houseal Lavigne has flourished—growing from the two founders working in a small room to a diverse staff in a collaborative Downtown Chicago design studio with additional offices in Los Angeles and Seattle. Today, Houseal Lavigne has established itself as one of the top planning firms in the United States, working to strengthen communities through creative and dynamic approaches to planning, design, and development.

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...



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 Planning

As a testament to our firm's overall approach and project methodologies, Houseal Lavigne has frequently been recognized across the country by our peers 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. In addition, Houseal Lavigne was awarded the APA's 2014 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 emergent technologies, industry-leading graphic communication, and noted our firm's overall influence on the planning profession across the United States.

In April of 2020, Houseal Lavigne's work with the Town of Morrisville received two awards for the use of technology as part of the Land Use Plan and Town Center 3D Scenarios Visualization. This includes the American Planning Association - Technology Division's Smart Cities Award and Esri's Special Achievement in GIS Award. Both awards recognized the innovative use of tools and software including SketchUp, CityEngine, and the Unreal Engine to visualize and analyze different land use scenarios for Morrisville's Town Center.

Recent Awards

2023

Esri - Innovation Award
Use of ArcGIS system in an innovative or disruptive way
ESRI SAG Award
Riverside, CA RHNA Housing Opportunity Finder

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
MO APA - Outstanding Public Outreach Award
Springfield Forward SGF Comprehensive Plan

2021

CO APA - General Planning Award
Gunnison Comprehensive Plan
NC APA - Marvin Collins Award for a Comprehensive Plan
Morrisville Land Use Plan/Town Center

2020

APA National - Smart Cities Award: Technology Division
Morrisville Town Center/Land Use Plan
Esri - Special Achievement in GIS Award
Morrisville Town Center/Land Use Plan

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

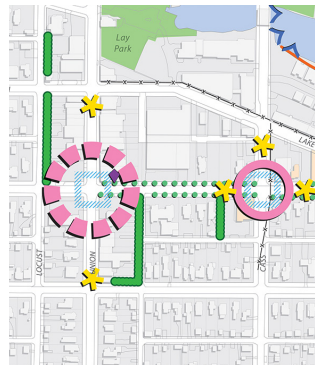
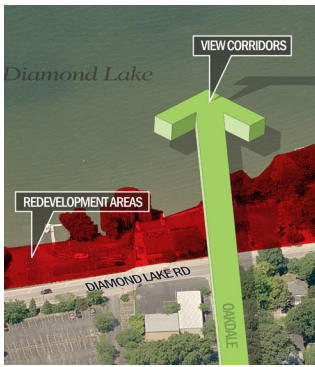
MI APA - Daniel Burnham Award (Best Plan)
Imagine Flint Master Plan

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 and Zoning

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

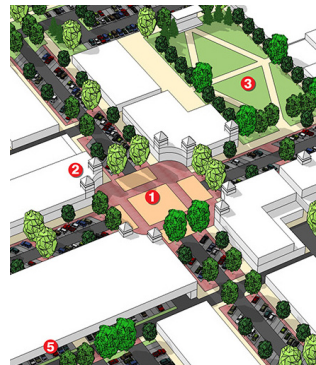
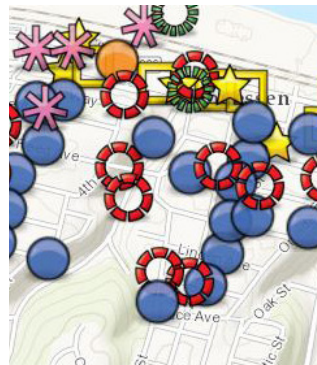
Houseal Lavigne has extensive experience in community planning, visioning and goal setting, implementation strategies, comprehensive planning, economic development studies, urban design, and more. We have directed, managed, and assisted with similar planning assignments for communities across the country.

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.

Zoning Experience

Houseal Lavigne has in-depth expertise and experience updating municipal zoning, sign, and subdivision ordinances, including amendments; complete re-writes of entire code sections; developing entirely new ordinances; creating unified development ordinances, planned-unit development ordinances; landscape ordinances; sign ordinances; Zoning Board of Appeals and Plan Commission support and training; administrative and procedural components; and more. Our experience with zoning and development regulations, coupled with our extensive expertise in several other areas of planning (comprehensive planning, downtown planning, neighborhood planning, site planning and development review, corridor planning, and more) allows us to create a responsive, appropriate, modernized, and user-friendly zoning code that both implements and reflects the City's vision, desires, and past planning efforts.

Traditional and Form-Based Codes

Houseal Lavigne's staff has extensive experience in assisting communities throughout the country in developing traditional and form-based development regulations. Our balanced approach of local character assessment, standards development and testing, stakeholder outreach, and analysis of appropriate procedures and review commissions takes into account the complete process of drafting and implementing locally appropriate regulations. Communities in which Houseal Lavigne has developed traditional or form-based codes include, but are not limited to:

- Ardmore, OK
- Benton Harbor, MI
- Bentonville, AR
- Bloomington, IL
- Cañon City, CO
- Carol Stream, IL
- Carpentersville, IL
- Cary, IL
- Centerton, AR
- Chicago, IL
- Dunwoody, GA
- Elmhurst, IL
- Ferguson, MO
- Flint, MI
- **Franklin, WI**
- Fremont, NE
- Hainesville, IL
- Harwood Heights, IL
- Homewood, IL
- Jackson, MO
- Jenks, OK
- Kenilworth, IL
- Knightdale, NC
- Marion, IA
- Melrose Park, IL
- Muskogee, OK
- New Buffalo, MI
- Northbrook, IL
- Oak Brook, IL
- Oak Brook Terrace, IL
- **Oak Creek, WI**
- Palos Heights, IL
- Palos Park, IL
- Richton Park, IL
- River Forest, IL
- Roscoe, IL
- Springfield, MO
- Sunset Hills, MO
- **Verona, WI**
- Wake Forest, NC
- Willowbrook, IL
- Winnetka, IL
- Yorkville, IL

Plan and Regulation Alignment

Houseal Lavigne has unmatched experience working with communities to translate recent planning efforts into actionable regulation. Often, communities will adopt plans with a clear vision, only to "pull the reins back" on the regulations needed to achieve their objectives. The common rationale for this being stakeholders often feel that such regulations will drive development elsewhere. We are sensitive to this and understand that community and economic development is a competitive venture. However, our experience also shows that properly drafted codes can remove unnecessary barriers to investment by providing flexibility for potential developments, offsetting the requirements related to design. In this way, the zoning and land development ordinances offer an opportunity to make good development easy. Our team will focus on the overall usability and "friendliness" of the ordinances, from their clarity to the efficiency of review and approval procedures. This will maximize the likelihood of continued investment that leads to desirable development.

Subject Matter Experts

Houseal Lavigne has authored technical articles featured in the American Planning Association's *Zoning Practice* publication. Topics of articles drafted by Houseal Lavigne staff include the integration of clear and user-friendly graphics in zoning ordinances, and the development of locally contextual and appropriate design guidelines and form-based codes





Birchline Planning LLC
Great Waters + Great Communities

Birchline Planning LLC

FIRM PROFILE

Program and policy development; financing plans and budgets; public engagement and communications; regulations: These are the tools communities and agencies can use to create healthy waters and thriving communities. Founded in 2012 to provide clients with flexible, efficient consultant support, **Birchline Planning LLC** is a woman-owned small business based in Waterbury, Vermont. For 25 years **Juli Beth Hinds**, AICP, Birchline Planning’s founder and Principal, has provided public and private-sector clients with unique and effective leadership and expertise in land use planning, water resources, program development, financial management, and public communications. Working in partnership with other outstanding professionals, firms and organizations, Birchline Planning has helped clients throughout the US and eastern Canada with projects focused on:

- ❖ **Zoning, code and design manual updates**, whether comprehensive overhauls of regulations and plans or an effort focused on specific topics or issues such as barriers to housing types, stormwater standards or area plans.
- ❖ **Integrating watershed modeling and engineering with planning, zoning and capital budget processes**, bridging the gaps between engineering, regulation, real estate analysis and land use planning through effective communication and technical analysis.
- ❖ **Code and process audits**, helping communities and stakeholders understand where and how regulations, market conditions, and ‘people issues’ are interacting to shape outcomes – and what can be done to re-orient a community or organization towards its desired future.
- ❖ Realistic **planning and financing strategies** for water infrastructure, open space conservation, and new public facilities using available financing techniques, such as TIF and special purpose districts, stormwater enterprise funds, CDBG and US EPA grant programs, or impact fee programs.
- ❖ Engagement and training through **innovative workshops, training sessions, and presentations** that help agencies, professionals, and interests work together on challenging water resource and land use issues, ranging from homeowner association financial responsibility for storm water systems to complex state-wide policy issues.
- ❖ **Expert witness and private development services**, helping select clients navigate the permitting and legal process with competent and ethical consultant support.

BirchlinePlanningLLC@gmail.com
802.324.5760

NEW ENGLAND

46 South Main Street, Suite 3A
Waterbury, VT 05676

GREAT LAKES

2127 Tartan Court
Wheaton, IL 60187

CALIFORNIA

3522 Udall Street
San Diego, CA 92106

Core Services & Skills

- ❖ Zoning & regulations
- ❖ Program, strategic & financial plans
- ❖ Water resources planning
- ❖ Code & process audits
- ❖ Public communications, engagement & outreach
- ❖ Policy development facilitation & mediation
- ❖ Water resources planning, education & training
- ❖ Expert witness & entitlements

Representative Clients

Great Lakes

- ❖ City of Bayfield, WI
- ❖ City of Superior, WI
- ❖ City of Green Bay, WI
- ❖ City of Madison, WI
- ❖ Milwaukee Metropolitan Sewerage District
- ❖ Ohio Environmental Protection Agency
- ❖ DuPage County (IL) Department of Public Works
- ❖ University of Wisconsin-Madison
- ❖ Upper White River Watershed Alliance (IN)

California & Pacific

- ❖ City & County of Honolulu
- ❖ Maui County
- ❖ Hawaii County
- ❖ Western Riverside Council of Governments
- ❖ Unified Port of San Diego
- ❖ San Diego Regional Airport Authority
- ❖ San Diego County Department of Public Works

New England & Canada

- ❖ Mad River Valley Planning District
- ❖ Gulf of Maine Council on the Marine Environment
- ❖ SP Land Company, Killington
- ❖ Burlington, Westford, Middlesex, Duxbury, South Burlington, St. Albans City & Town, Rutland City & Town, Manchester & Waitsfield, Vermont

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SECTION 2

KEY PERSONNEL

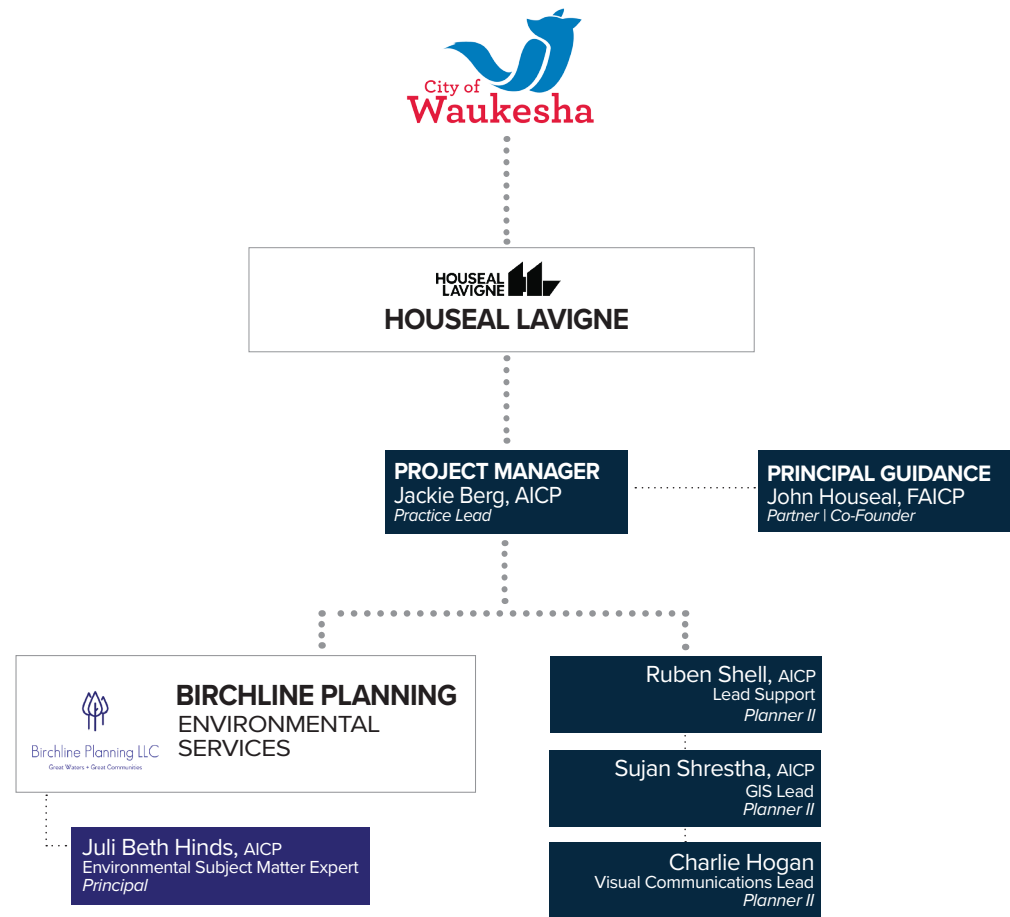
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Key Staff

Houseal Lavigne and Birchline Planning have a strong relationship with experience working together on several zoning and subdivision ordinance update projects in Wisconsin. We strive to develop equally strong working relationships with our clients and hope to be considered an extension of City staff. Our team will coordinate with City staff throughout the process to ensure the final Zoning Code reflects this spirit of collaboration.

Team Organization



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 Founda-
tion
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

AICP Certification Instructor

APA National and APA State Chapters
(2005 to Present)

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

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
- Carol Stream, IL
- Cary, IL
- Chicago, IL
- Dunwoody, GA
- Fairview Heights, IL
- Flint, MI
- Geneva, 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

Downtown Plans

40+ Downtown Plans including:

- Bentonville, AR
- Downers Grove, IL
- Forest Park, IL
- Geneva, IL
- Oshkosh, WI
- Round Lake, IL
- St. Joseph, MI

Comprehensive Plans

100+ 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

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

Master of Urban Planning,
University of Kansas

Bachelor of Arts in Architecture,
University of Kansas

Memberships

American Planning Association (APA)

Rotary International

Certifications

AICP

Presentations & Publications

APA-WI - Leveraging GIS to Address Housing

APA-IL CMS - Finding the Middle, Inclusive by Design

APA-IL - A Tale of Two Neighborhoods

APA-IL - Zoning to Balance Gentrification, Preservation, and Investment

APA National - Leveraging Technology to Combat the Housing Crisis

APA National - Data Driven Approach to Meeting Community Housing Needs

APA Zoning Practice - Practice Gentle Density

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

- Hasting, 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



Ruben Shell AICP Planner II

Education

- Master of Urban and Regional Planning
The University of Michigan
Taubman College of Architecture & Urban
Planning
Ann Arbor MI, 2019
- Bachelor of Science in Geography
Central Michigan University
Mount Pleasant, MI, 2015

Memberships

- American Planning Association, National
- Michigan Association of Planning

Ruben is a Planner II with Houseal Lavigne Associates. His primary focus is revising zoning, sign, and subdivision ordinances that feature user-friendly layouts, align with community planning efforts, and streamlined development processes. Ruben also contributes to comprehensive plans, corridor plans, and downtown plans, and other land use planning projects.

He comes to Houseal Lavigne Associates 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 keen, hands-on understanding of the ways in which municipal 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, and to address nonconforming subdivisions. In Michigan, 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*

Comprehensive Plans

- City of Iron Mountain, MI - Comprehensive Plan*
- City of Roseville, MI - Comprehensive Plan Update*
- City of 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*
- City of Warren, MI - Comprehensive Plan*
- City of Lincoln Park, MI - Master Plan*

Land Development Regulations

- New Buffalo Township, MI - Zoning Ordinance Rewrite*
- Homewood, IL - Zoning Ordinance Update
- Willowbrook, IL - UDO
- Centerton, AR - Zoning Audit
- Canon City, CO - UDC
- Franklin, WI - UDO
- Fremont, NE - UDC
- Jenks, OK - UDO
- New Buffalo, MI - Zoning Ordinance
- Yorkville, IL - UDO

Subarea Plans & Special Projects

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

*Work conducted at other firms



Sujan Shrestha

AICP, LEED GA
Planner II

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 Earthquake Post-Disaster Reconstruction", 2016

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 primary 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.

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 include extensive research and presentations on post-disaster reconstruction of historic cities in Nepal.

Project Experience

Zoning Ordinances

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

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

Education

Bachelor of Urban Planning,
University of Cincinnati

Memberships

American Planning Association (APA)

Charlie is a planner and designer with 4 years of experience developing equitable, sustainable and attractive community plans at a variety of scales. He believes in a ground-up approach to planning that emphasizes public engagement and implementable solutions. His experience in the private, public and non-profit sectors has given him experience in comprehensive planning, equity-oriented neighborhood planning, economic development, and graphic design.

Charlie has been involved in community plans and projects throughout the Midwest and beyond. He has experience preparing existing conditions reports, developing relationships with stakeholders, and creating planning and zoning solutions for a variety of complex localized problems. Charlie believes that the ultimate determinant of a plan's success or failure is the degree to which the residents can take ownership of it. As a result, he places immense value on the input of residents and local community stakeholders. Working with a variety of communities, Charlie has been able to effectively engage with residents and leverage quantitative feedback on the challenges and desires of the population. He truly enjoys building relationships with the communities he works in to turn input into action.

Charlie is well-versed in the graphic side of planning work, and is highly skilled in a variety of software including Adobe Creative Suite, Sketchup Pro, ArcGIS, AutoCAD, and Microsoft Office applications. Charlie is a strong graphic and personal communicator with an ability to thrive in team-based, deadline driven environments. He can create high quality and attractive maps, 3D renderings, presentations, book-lets, and info-graphics that effectively communicate the ideas of a plan or project to the community.

Project Experience

Comprehensive Planning

- Dublin, OH - Community Plan
- Fort Wayne, IN - All in Allen Comprehensive Plan
- Huntley, IL - Comprehensive Plan
- South Barrington, IL - Comprehensive Plan
- Harvey, IL - Comprehensive Plan
- Anderson, SC - Comprehensive Plan
- Countryside, IL - Comprehensive Plan
- Fremont, NE - Comprehensive Plan
- Munster, IN - Comprehensive Plan
- Bay Village, OH - Comprehensive Plan*
- Urbandale, IA - Comprehensive Plan & Vision Plans
- Hainesville, IL - Comprehensive Plan
- Springfield, MO - Comprehensive Plan
- Dallas, TX - Land Use Plan
- McHenry County, IL - Comprehensive Plan

Zoning and Design Guidelines

- Anderson, SC - Unified Development Code
- Eau Claire, WI - Zoning Update
- Thornton, CO Development Code Update
- Yorkville, IL Unified Development Ordinance
- Savoy, IL - Unified Development Ordinance
- Willowbrook, IL - Zoning Ordinance Update
- Elmhurst, IL - Zoning Ordinance Update*
- Jefferson Parish, LA - Industrial Zoning District Study*
- Keene, NH - Downtown Zoning
- Trenton, NJ - Land Development Ordinance*
- Morrisville, NC - Land Use Plan Implementation
- San Anselmo, CA - Housing Element Update
- Homewood, IL - Zoning Ordinance Update
- River Forest, IL - Corridor Redevelopment and Regulatory Plan

Neighborhood Planning

- Chicago, IL - West Garfield Park Corridors Plan
- Chicago, IL - Auburn Gresham 79th Street Corridor Plan
- Gunnison, CO - Subareas Plan
- Oshkosh, WI - Downtown Redevelopment Plan
- Huntsville, Alabama - Mill Creek Choice Neighborhoods Plan*
- Chicago Heights, IL - Downtown/East Side Choice Neighborhoods Plan*
- Toledo, OH - Junction Choice Neighborhoods Plan*
- Easton, PA - West Ward Neighborhood Plan*
- Grand Rapids, MI - South Division corridor Plan*
- Wheaton, IL - Roosevelt Road Comprehensive Plan*
- Cleveland Heights, OH - Noble Road Corridor Plan*
- Park Forest, IL Downtown Master Plan

**Work conducted at other firms*



Birchline Planning’s founding Principal, **Juli Beth Hinds, AICP**, provides public and private-sector clients with unique and effective leadership and expertise in land use planning, water resources, program development, financial management, and public communications. With over a decade of experience as a municipal planning and stormwater services director, she has proven experience managing complex municipal planning, finance, and water resource programs. A sought-after speaker, she develops and leads innovative workshops that engage and empower citizens, public-sector leaders, and professionals.

JB is a passionate teacher in UC San Diego’s Urban Studies and Planning Program and leads research teams working on local and global water resource, land use and resilience issues. She and her husband love fishing, gardening, and trying to keep up with their 4 adult children and 2 dogs.



Education

- ❖ MCRP, City and Regional Planning, Rutgers University
- ❖ BA, Economics, Hollins College; *Phi Beta Kappa*

Teaching

- ❖ University of California San Diego Urban Studies & Planning Program (Instructor) and School of Global Policy & Strategy (Guest Lecturer), 2015 – Present
- ❖ National University School of Engineering, Technology & Media (Adjunct Professor), 2012-2017
- ❖ Northern Vermont University Department of Environmental Science (Adjunct Professor), 2004-2010

Professional Service

- ❖ Stormwater Symposium, Water Environment Federation (2013-2016)
- ❖ Chair, Environment Natural Resources & Energy Division, American Planning Association (2010-2013)
- ❖ Decentralized Research Advisory Committee, Water Environment Research Foundation (2004-2010)

Work Experience

- ❖ Senior Planner, Tetra Tech Inc. (San Diego, CA); 2010-2012
- ❖ Senior Planner, VHB Inc. (South Burlington, VT); 2008-2010
- ❖ Director of Planning & Zoning, City of South Burlington, VT; 2001-2008
- ❖ Executive Director, Mad River Valley Planning District, Waitsfield VT; 1997-2001
- ❖ Planner, BfJ Planning, New York NY; 1994-1997

Research Initiatives

- ❖ Co-PI with Dr. Keith Pezzoli, Planning for Alternative Non-Potable Water Reuse in Disadvantaged Communities; UC San Diego Bioregional Center (2017-present)
- ❖ Innovations in Planning and Public Engagement for Community Resilience; UC San Diego Urban Studies & Planning Program with American Planning Association; 2017-present
- ❖ Urban Agriculture Suitability Analysis; UC San Diego Superfund Research Center (2015-2016)
- ❖ “Redesigning the American Neighborhood” Public Engagement in Water Quality Restoration; US EPA Region 1 Grant to School of Natural Resources, University of Vermont (2002-2008)

Recent Publications

- ❖ Regional Water Resource Planning. 2017. In *Emerging Trends in Regional Planning*, American Planning Association Planning Advisory Service
- ❖ Evaluating the Real Estate Development and Financial Impacts of the San Diego Region’s Post-Construction Standards and Alternative Compliance Program. *2016 International Low Impact Development Conference*

Recognition

- ❖ Council for Advancement and Support of Education Circle of Excellence Silver Award for Public and Community Relations (with University of Wisconsin-Madison, 2018)
- ❖ Professional Planner of the Year, Vermont Planners Association (2008)
- ❖ US EPA Region 1 Environmental Excellence Award (2008)
- ❖ Vermont Governor’s Award for Excellence in Pollution Prevention (2005)

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SECTION 3

PROJECT SCOPE & TIMELINE

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Scope of Work

Task 1: Project Initiation

To “kick-off” the update process on the right foot, meetings will be conducted with Waukesha staff, Plan Commission, and Common Council before undertaking other community outreach activities. This approach allows Houseal Lavigne and the various Waukesha -designated individuals to discuss roles, responsibilities, scope, and issues and opportunities with existing regulations, to ensure the project gets off to a good start.

1a: Staff Coordination Call

Houseal Lavigne will host a web meeting/conference call with the Waukesha’s staff, to confirm dates and times for the official staff kickoff and department head meetings and elected and appointed officials roundtable. On this call, we will also identify which existing communication channels are most effective and trusted for spreading the word about the project to the public and identify community leaders and others who will help engage hard-to-reach populations and build more equity into the process. To ensure consistent communication and coordination, the Project Manager will conduct regular and “as-needed” conference calls and/or web meetings with Waukesha staff throughout the update process.

1b: Community Communications – Branding, Messaging, and Collateral

This step will run through the course of the project and play a significant role in garnering support for the update process and piquing public interest in the Zoning Code Code. The graphic design and communications experts on the project team will use their expertise in community-based marketing to create an “identity” for the update process as well as the code document. Additionally, communications campaigns will be implemented at key points throughout the project including before public workshops and open houses, when online engagement materials are made available, and when draft and final memos, code sections, and other material are available for public review, to ensure the community becomes and remains aware of and engaged in the process.

1c: Staff Kick-off Meeting and Orientation “Tour” of the City

A kick-off meeting will be held with Waukesha staff. 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 the existing conditions and context of the various areas of the City. We intend to function as a unified and integrated team alongside Waukesha staff and officials. During this meeting, we will also confirm upcoming meetings and events including the first Joint Common Council/Plan Commission meeting, stakeholder interviews, and community workshop.

1d: Department Heads Meeting

Immediately following the staff kick-off meeting, Houseal Lavigne will host a meeting with the Department head and/or representatives from all the different Waukesha Departments. Since many Waukesha departments are responsible for the administration and/or enforcement of various portions of zoning it is essential to receive feedback from these users on what is working and what needs to be updated.

1e: Joint Common Council/Plan Commission Roundtable

Houseal Lavigne will facilitate a Joint Roundtable Discussion with the Common Council and the Plan Commission to introduce Houseal Lavigne to officials and solicit their concerns and aspirations for the new Zoning Code Update. As the community’s decision makers it is important that the Common Council and the Plan Commission have a chance to communicate and discuss their issues and concerns with existing regulations with Houseal Lavigne, as well as each other, at the beginning of the process.

Task 2: Community Engagement

A Zoning Code Update requires a unique approach to community outreach. Outreach for a planning process should encourage ambitious thinking and broad community input. For Zoning Code Updates, outreach must consider the impact of ordinance changes on property owners, development rights, and investment in current development in the community. Zoning Code Update engagement will also bring community members to the table who can shed light on local market realities, the level of tolerance for increased regulation, first-hand experience with development review and entitlement, and gauge public response to the introduction of new standards and regulations, in order to accomplish the long-term goals of the Waukesha community as established in the new comprehensive plan.

2a: Project Website

At the onset of the project, we will design and host an interactive project website that is 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 and will therefore include content to educate and inform the community, clarify the relationship between the City's plan and zoning, host an online questionnaire, and post draft documents and diagrams.

2b: Online Community Questionnaire

To provide another means for community participation, we will prepare an online questionnaire for Waukesha's residents and business owners to offer community-wide opinions on the City's current zoning. The online community questionnaire will be easily accessible on the project website.

2c: Key Stakeholder Interviews (up to 10)

Key stakeholder interviews allow us to gain insight into the community that we might otherwise not be able to obtain. Up to 10 confidential interviews will be conducted to obtain additional information regarding issues with the existing zoning. Houseal Lavigne will work with Waukesha staff to identify those to be interviewed. We recommend a broad sampling of interviewees who have experience going through a zoning approval process in the community. Interviewees could include selected property owners, developers, architects, real estate agents, and business owners. The interviews will be conducted in-person during scheduled visits related to other outreach events or via telephone/teleconference as needed.

2d: Communications Campaign #1

Communications campaigns are integrated throughout the scope of work and are timed with outreach efforts and major project milestones. This ensures that the community understands the project and is continually engaged and informed throughout the project process. The first campaign will focus on public education and introducing the project, its goals, and process to the community. It will work to build support for the initiative and counter perceptions and misinformation identified in the early stages of the project and include a call-to-action to provide feedback at the upcoming workshop and via the online questionnaire. Materials will include social media and website posts, flyers, intercept signs at key locations with a QR code to the project website, and a press release. Communications will be pushed to community leaders and others identified as a part Step 1a to help engage hard-to-reach populations.

2e: Community Workshop

The purpose of the Community Workshop is to move from the general vision and ideas of the City's recent planning efforts, including the soon to be completed Comprehensive Plan, and into the primary objectives of the Zoning Code Update. The goal of the workshop will be to form a consensus among participants concerning the primary objectives of the Zoning Code Update as identified in the RFP and by Waukesha staff.

2f: Community Engagement Takeaways Summary

This task will conclude in a memorandum that summarizes the key themes and takeaways from all community outreach events. The memorandum will provide focus and direction for subsequent update activities and serve as the cornerstone of the consensus-building process. The memorandum will be incorporated into the Current Zoning Code Analysis and Preliminary Recommendations Report delivered as part of Task 3.

Task 3: Current Zoning Code Analysis and Preliminary Recommendations

This task will include the preparation of a Current Zoning Code Analysis and Preliminary Recommendations Report that will provide a detailed assessment of the City's current Zoning Code and Houseal Lavigne's recommendations for the Zoning Code Update. 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 stakeholders, and the experience and expertise of Houseal Lavigne.

3a: Assessment of Current Zoning Code and Recent Development Proposals

The review and assessment of the current Zoning Code will entail a detailed chapter-by-chapter, section-by-section review. The assessment will highlight areas where the existing regulations, standards, procedures, processes, and other requirements are problematic, when measured against national best practices and effectively accommodating property investment while safeguarding and ensuring community character and sense of place.

The City's recent history of development proposals and applications for zoning relief will also be reviewed to identify "pain points" in bringing forward development.

3b: Conformity Analysis

Houseal Lavigne will conduct a conformity analysis using ArcGIS Pro to evaluate existing development conditions against the bulk and use standards of the current Zoning Code. This level of analysis is important, not only to determine if existing development is consistent with the existing Zoning 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 Zoning Code Update 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 established and historic areas of the City.

3c: Comprehensive Plan Alignment

Houseal Lavigne will conduct an assessment of the City's soon to be completed Comprehensive Plan to determine where goals, policies and recommendations of the plans could be implemented through the Zoning Code Update.

3d: Best Practices and Comparative Community Research

Houseal Lavigne will conduct best practices and comparative community research on key topics to inform the City about approaches other communities have taken to address similar issues.

3e: Current Zoning Code Analysis and Preliminary Recommendations Report

Finally, these findings will be packaged into an Zoning Code Analysis and Preliminary Recommendations Report. The Zoning Code Analysis portion of the report will describe the issues with current regulations based on staff and elected/appointed official feedback, community outreach, alignment with past plans, and our expertise and analysis. The Preliminary Recommendations portion of the report will include an overall organization of the Zoning Code as well as identify strategies for how to proceed, what to prioritize, and case studies and best practice approaches to be considered in order to resolve the identified issues.

3f: City Staff Review

Houseal Lavigne will review and discuss the Current Zoning Code Analysis and Preliminary Recommendations Report with City staff before meeting with the Common Council and Plan Commission. Appropriate revisions will be made based on Boston, MA. Staff feedback.

3g: Joint Common Council/Plan Commission Working Session

Houseal Lavigne will meet with and present the Zoning Code Analysis and Preliminary Recommendations Report to the Joint Common Council/Plan Commission, along with City staff, to gather feedback and input.

3h: Communications Campaign #2

To keep the community engaged and informed throughout the Zoning Code Update process, the Zoning Code Analysis and Preliminary Recommendations Report will be posted on the project website. A series of 3-5 social media posts will also be developed to market the availability of the documents for public review and comment. Communications will be pushed to community leaders and others identified as a part Step 1a to help engage hard-to-reach populations.

Task 4: District and Use Standards

This task will entail the preparation of the first third of the Zoning Code including base and overlay district specific standards and supplemental use standards.

4a: Establishment of Districts and Zoning Map

This task will involve revisions to district purpose and intent statements to align with the City's past plans as well as any map updates desired by the City based on the analysis conducted and recommendations made as a part of Task 3.

4b. Base and Overlay District Specific Standards

This task will include updates to base and overlay district standards to modernize and align uses. Bulk and dimensional standards will also be revised during this step based on the results of the conformity analysis conducted as a part of Task 3.

4c. Supplemental Use Standards

This task will include the development of supplemental use regulations that incorporate design principles relevant to specific uses.

4d. City Staff (up to 3)

Houseal Lavigne will facilitate up to three review calls with City staff before meeting with the Common Council and Plan Commission. Appropriate revisions will be made based on City staff feedback.

4e. Joint Common Council/Plan Commission Working Session

The draft district and use standards will be presented and discussed with the Joint Common Council/Plan Commission. The intent will be to review and discuss major proposed changes in sufficient detail to provide the necessary direction for regulation refinement and the development of supporting graphics and diagrams.

4f: Communications Campaign #3

To keep the community engaged and informed throughout the Zoning Code Update process, the draft district and use standards will be posted on the project website. A series of 3-5 social media posts will also be developed to market the availability of the documents for public review and comment. Communications will be pushed to community leaders and others identified as a part Step 1a to help engage hard-to-reach populations.

Task 5: Development, Natural Resource Protection, and Sign Standards

This task will entail the preparation of the heart of the Zoning Code including general development standards and sign standards.

5a. General Development Standards

This task will include objective, understandable standards and regulations for development throughout the City including, landscape standards, parking standards, outdoor lighting standards, and general design standards that facilitate and encourage redevelopment and business reinvestment and further the City's goal of revitalizing existing commercial corridors.

5b. Natural Resource Protection Standards

This task will entail an update to the City's natural resource protection standards to ensure they are user friendly and compliant with Wisconsin requirements.

5c. Sign Standards

This task will modernize the City's sign ordinance, ensuring it complies with relevant case law and is less repetitive, more business-friendly, and easier to interpret while still maintaining a visually appealing environment throughout the City.

5d. City Staff Review Calls (up to 3)

Houseal Lavigne will facilitate up to three review calls with City staff before meeting with the Common Council and Plan Commission. Appropriate revisions will be made based on City staff feedback.

5e. Joint Common Council/Plan Commission Working Session

The draft development and sign standards will be presented and discussed with the Joint Common Council/Plan Commission. The intent will be to review and discuss major proposed changes in sufficient detail to provide the necessary direction for regulation refinement and the development of supporting graphics and diagrams.

5f: Communications Campaign #4

To keep the community engaged and informed throughout the Zoning Code Update process, the draft development, natural resource protection, and sign standards will be posted on the project website. A series of 3-5 social media posts will also be developed to market the availability of the documents for public review and comment. Communications will be pushed to community leaders and others identified as a part Step 1a to help engage hard-to-reach populations.

Task 6: Planned Development and Zoning Procedures

This task will entail the preparation of the latter third of the Zoning Code including planned development procedures, zoning procedures, and definitions.

6a: Planned Development Procedures

This task will streamline the City's planned development procedures and ensure they are an effective tool in providing flexibility from underlying zoning requirements in exchange for tangible benefits to the Waukesha community as identified in adopted plans and policies.

6b: Zoning Procedures

This task will establish efficient and flexible review and approval procedures that increase transparency between Waukesha staff, elected and appointed officials, applicants, and the public.

6c: Definitions

This task will include a thorough update to all definitions to ensure that unnecessary definitions are eliminated, outdated definitions are clarified, and new definitions are added, as necessary.

6d. City Staff Review Calls (up to 3)

Houseal Lavigne will facilitate up to three review calls with City staff before meeting with the Common Council and Plan Commission. Appropriate revisions will be made based on City staff feedback.

6e. Joint Common Council/Plan Commission Working Session

The draft planned development and zoning procedures will be presented and discussed with the Joint Common Council/Plan Commission. The intent will be to review and discuss major proposed changes in sufficient detail to provide the necessary direction for regulation refinement and the development of supporting graphics, diagrams, and flowcharts.

6f: Communications Campaign #5

To keep the community engaged and informed throughout the Zoning Code Update process, the draft planned development and zoning procedures will be posted on the project website. A series of 3-5 social media posts will also be developed to market the availability of the documents for public review and comment.

Task 7: Draft and Final Zoning Code

Based on the previous tasks in the update process, the draft and final Zoning Code will be prepared and presented for review.

7a: Draft Zoning Code Document

Houseal Lavigne will prepare the draft Zoning Code document incorporating feedback received from City staff, the Common Council and Plan Commission, and the public. Graphics, diagrams, and flowcharts will be embedded in the document at this stage.

7b. City Staff Review Calls (up to 5)

Houseal Lavigne will facilitate up to 5 review calls with City staff before meeting with the Common Council and Plan Commission. Appropriate revisions will be made based on City staff feedback.

7c: Joint Common Council/Plan Commission Working Session

A final meeting will be conducted with the Joint Common Council/Plan Commission to review and reach agreement on the draft Zoning Code document before proceeding to the public review and adoption process. Appropriate revisions to the draft Zoning Code will be made based on feedback received and the revised draft Zoning Code will be prepared for public consideration.

7d: Informational Brochure

To summarize the proposed changes to the City's Zoning Code clearly and concisely, an Informational Brochure will be developed. The brochure will include answers to frequently asked questions, provide an overview of the Zoning Code Update process, highlight and provide the reasoning behind major proposed changes, and include information about where to learn more and provide feedback. The brochure can be made available on the interactive project website, at City Hall and other community facilities, and can be mailed to property owners and tenants, especially if any zoning map amendments are proposed.

7e. Communications Campaign #6

This final communications campaign will share the informational brochure through digital platforms and include a call-to-action to provide feedback at upcoming open houses. Language for press releases and media pitches will highlight the importance of the process for the future of Waukesha. Communications will be pushed to community leaders and others identified as a part Step 1a to help engage hard-to-reach populations.

7f: Community Open Houses (up to 2)

Members of Houseal Lavigne, along with City staff, will be present for up to two community open houses to allow residents and community stakeholders the opportunity to examine, discuss, and comment on the contents of the draft Zoning Code document. Houseal Lavigne will be available throughout the community open house to present material, answer questions, and get feedback before initiating the approval process. If an in-person open house is not feasible due to social distancing requirements, we will work with City staff to pivot to a virtual open house solution. Appropriate revisions to the draft Zoning Code will be made based on feedback received and the final draft Zoning Code will be prepared for final legal review.

7g: Final Legal Review

The final draft Zoning Code will be brought to the City Attorney for final legal review. Although the City Attorney may be involved throughout the process of developing the Zoning Code, final legal review is necessary before the final document is brought through the adoption process. Appropriate revisions to the final draft Zoning Code will be made based on feedback received and the final Zoning Code will be prepared for public notice.

7h: Plan Commission Presentation (public hearing)

Houseal Lavigne will present the final Zoning Code at the Plan Commission public hearing.

7i: Common Council Presentation (adoption)

Houseal Lavigne will present the final Zoning Code to the Common Council for consideration and adoption.

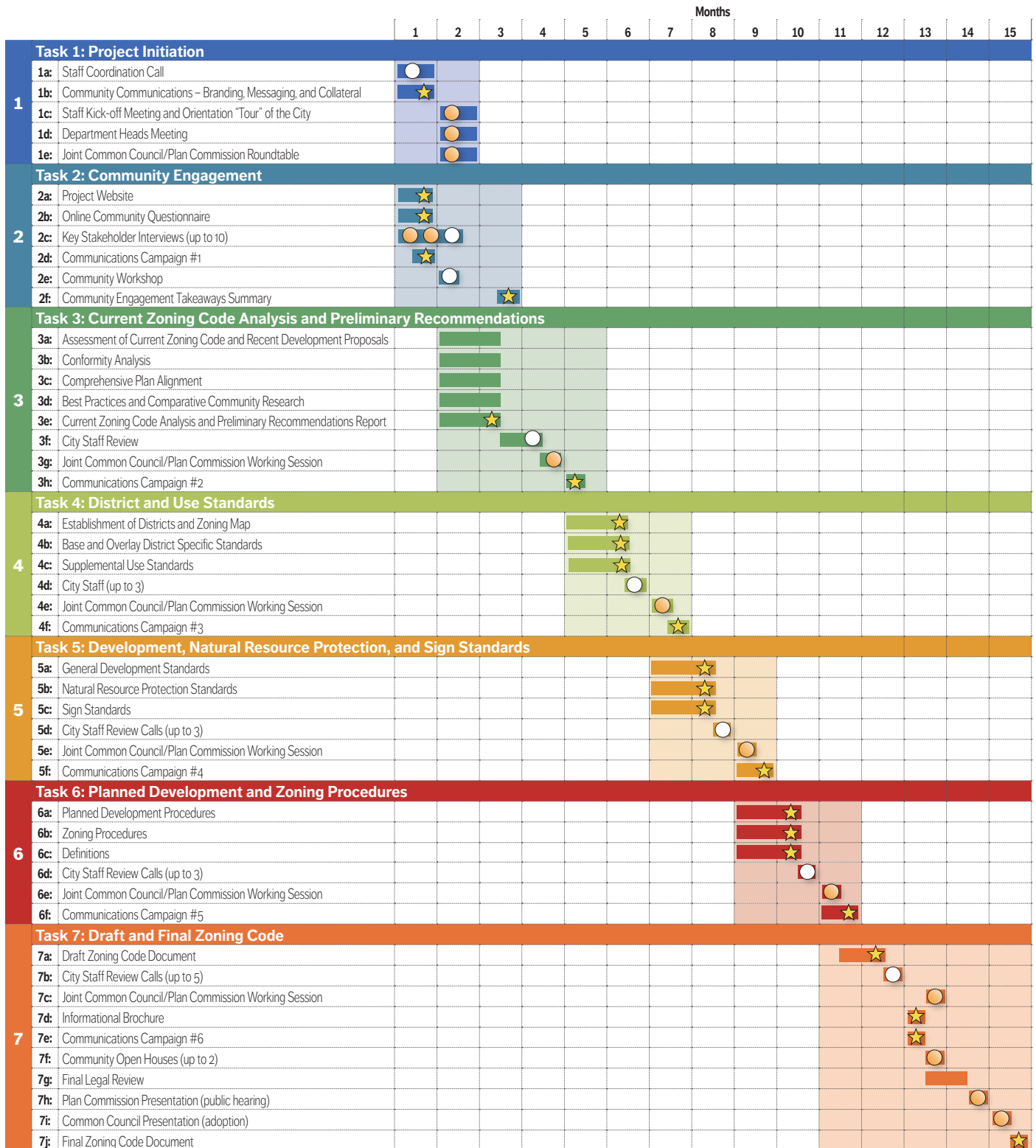
7j: Final Zoning Code Document

Following the adoption of the Zoning Code, Houseal Lavigne will share the final document and components with the City in fully editable documents including word document, pdf, jpeg, and png files. into the Downtown. Interviewees could include downtown business owners, downtown property owners, downtown residents, local builders and developers, service providers, a representative from City Centre, and representatives from other government bodies, institutions, and civic groups.



Proposed Timeline

The 15-month timeline below provides an overall framework to complete each step outlined in our proposed Scope of Work. We are ready to begin work immediately and are committed to devoting the proposed personnel and resources for the entire length of time necessary to complete the Waukesha Zoning Code Update. Should the City favor our basic approach, we will work with City staff to refine this Scope of Work and project schedule in a manner that is most advantageous to the assignment.



● Denotes Meetings to be conducted In-Person

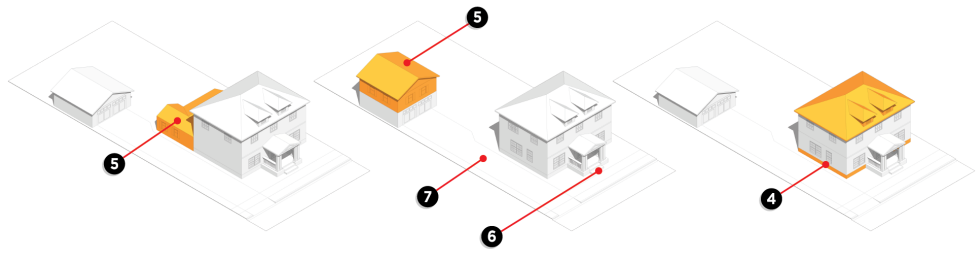
○ Denotes Meetings to be conducted Virtually

★ Denotes Deliverables to be produced by our Team

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SECTION 4

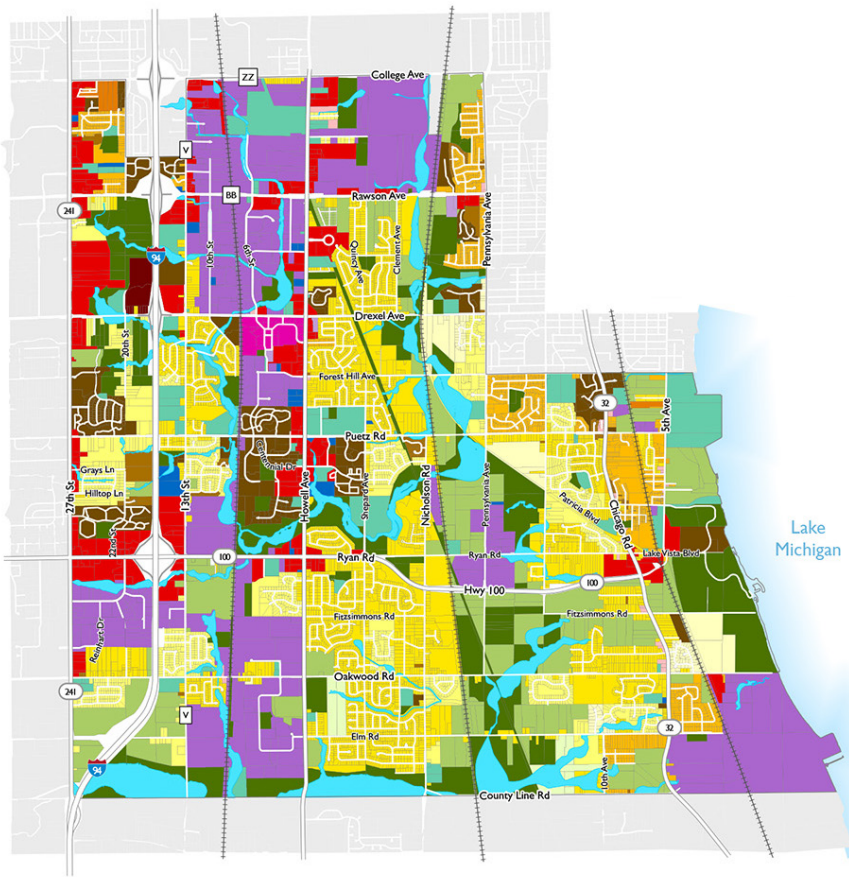
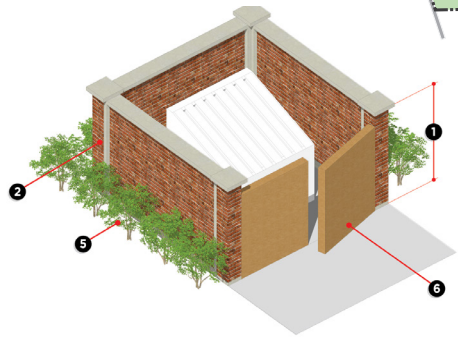
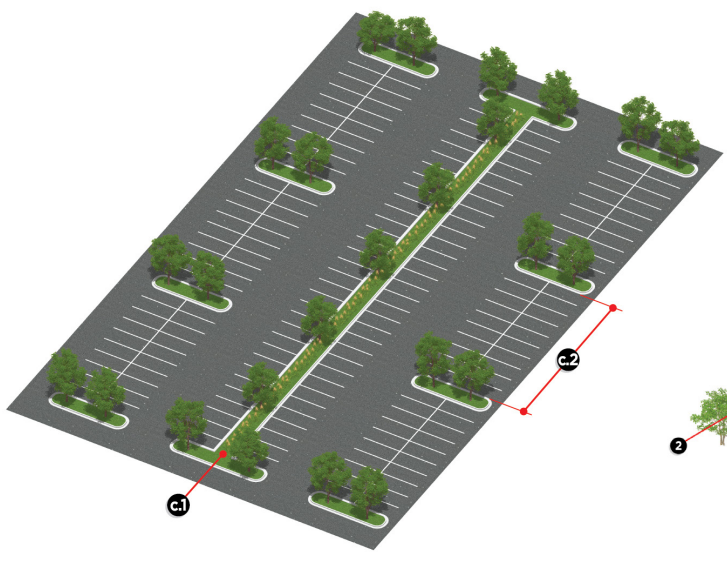
PROJECT EXPERIENCE & REFERENCES



Conventional Sprawl
 This example shows 32 homes
 Gross Density = 1 Dwelling Units/Acre
 Net Density = 1 Dwelling Units/Acre



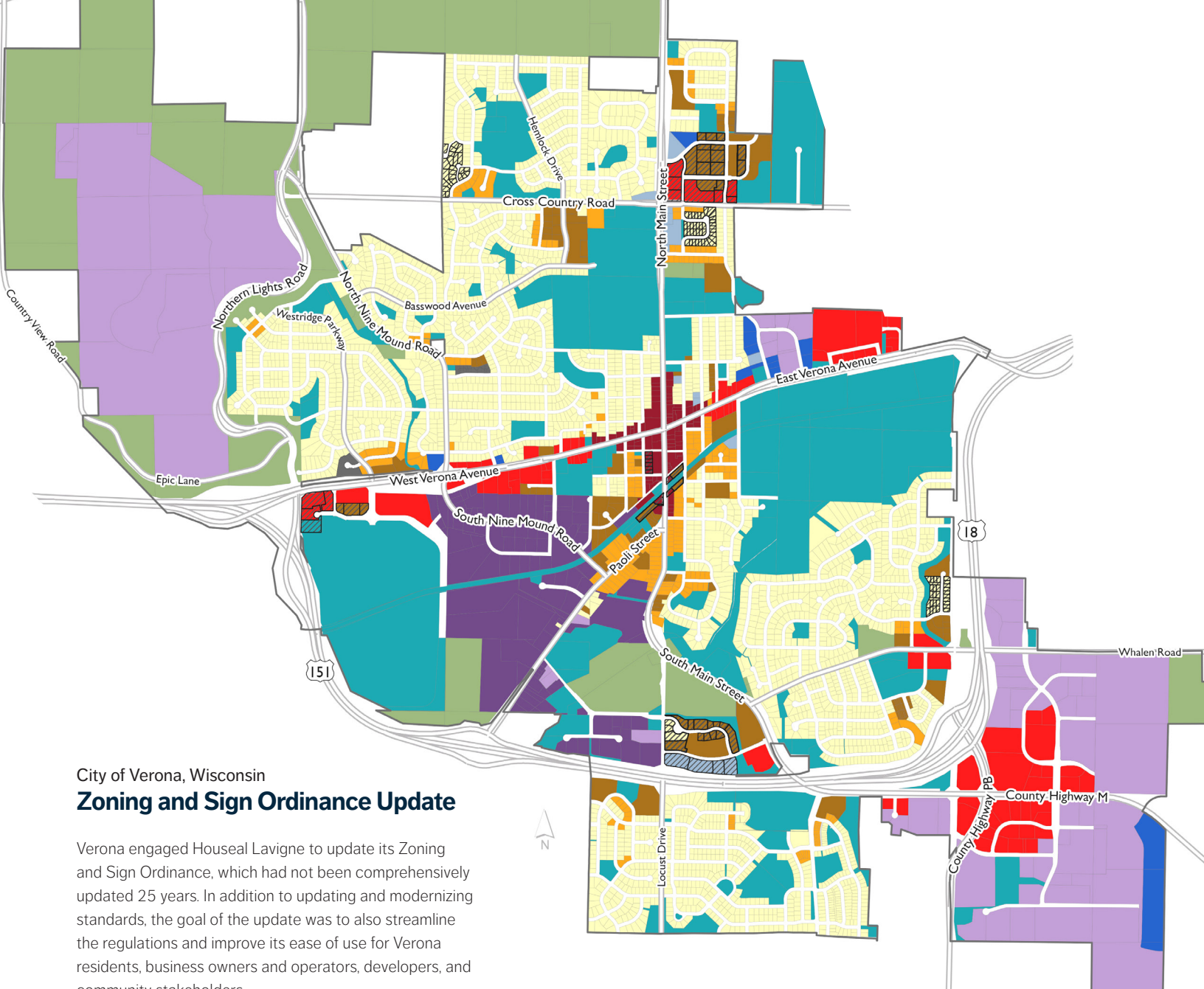
Conservation Development
 This example shows 32 homes
 Gross Density = 1 Dwelling Units/Acre
 Net Density = 4 Dwelling Units/Acre



City of Oak Creek, Wisconsin Zoning and Sign Ordinance Update

Located just south of Milwaukee on the shores of Lake Michigan, Oak Creek is a growing suburb that has transitioned from a semi-rural community of under 5,000 residents, to a diverse city of over 36,000. The new zoning ordinance was prepared to help better regulate development as the landlocked City transitioned to a fully built-out community. The new zoning ordinance was undertaken directly after adoption of a new Comprehensive Plan, both directed and prepared by Houseal Lavigne.

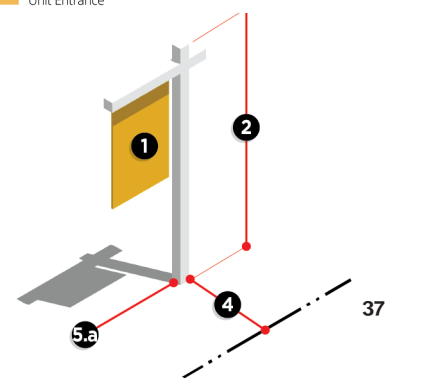
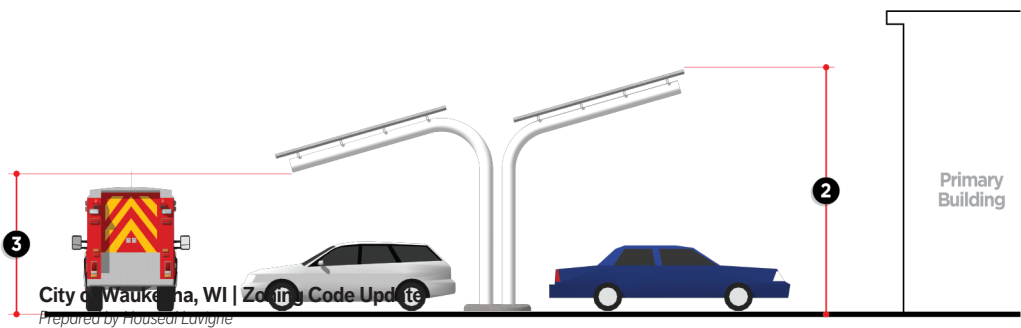
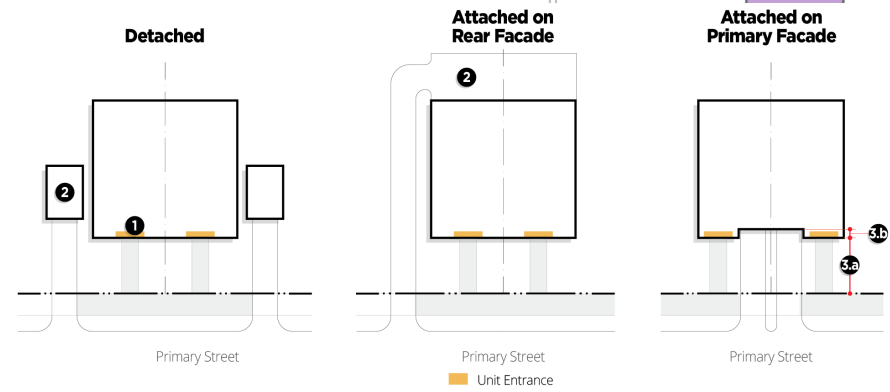
The zoning ordinance was updated to allow a greater variety of housing types in the City's traditional single-family districts, including accessory dwelling units, incentives for universal design to accommodate aging in place, and increasing the development potential of residential and commercial areas. The new zoning also establishes a conservation subdivision process, by "right-sizing" parking requirements and eliminating unnecessary bulk and dimensional requirements. The City's landscape, sign, fence, and other development standards were also updated to enhance the appearance of the community over time.



City of Verona, Wisconsin Zoning and Sign Ordinance Update

Verona engaged Houseal Lavigne to update its Zoning and Sign Ordinance, which had not been comprehensively updated 25 years. In addition to updating and modernizing standards, the goal of the update was to also streamline the regulations and improve its ease of use for Verona residents, business owners and operators, developers, and community stakeholders.

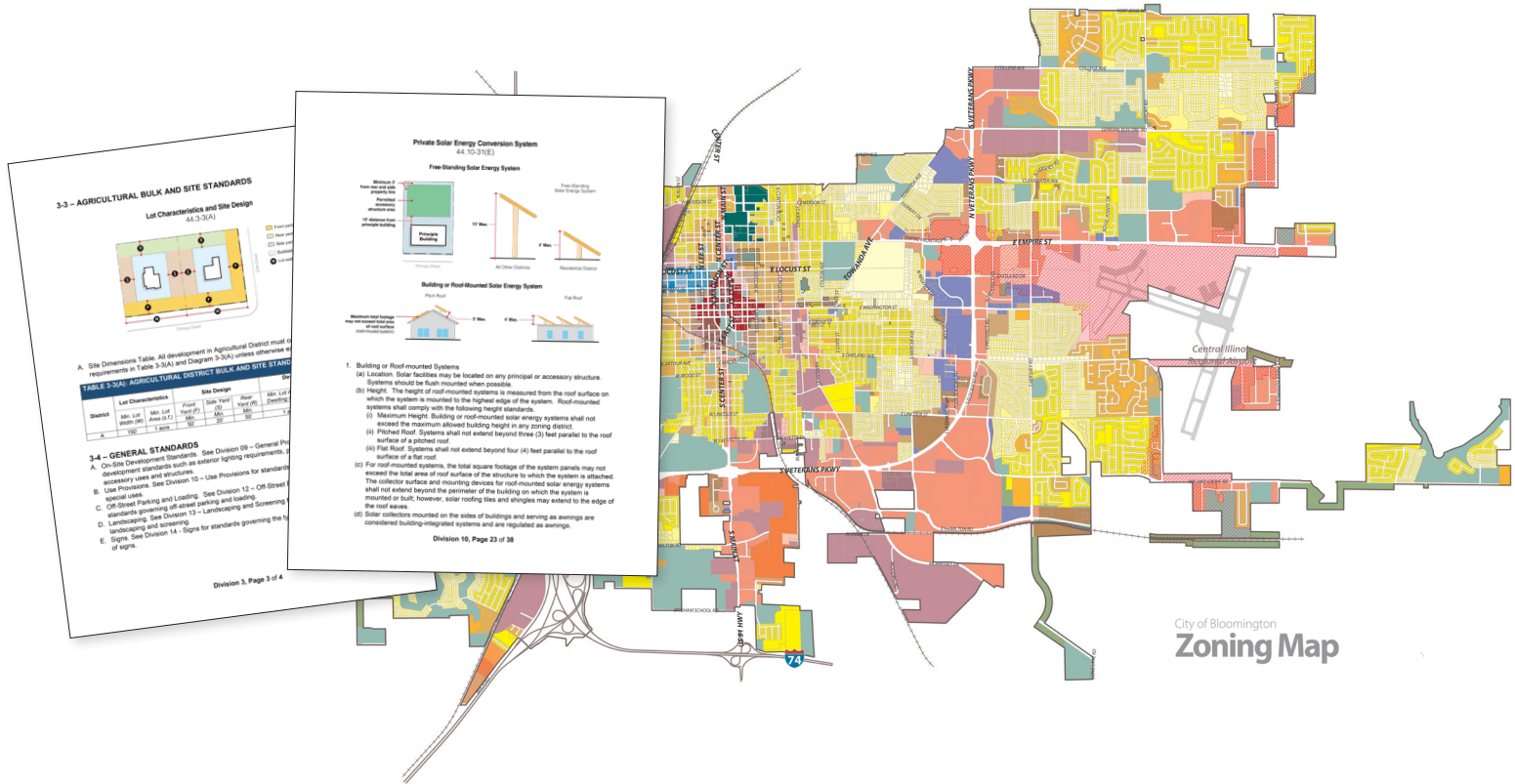
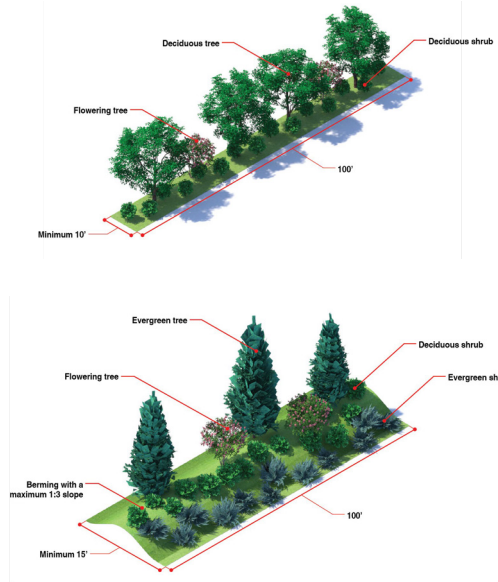
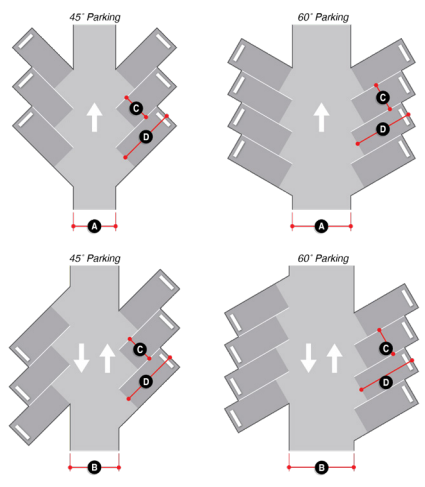
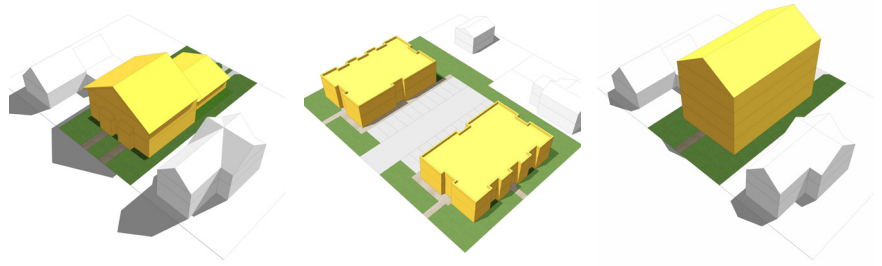
Prior to the update, nearly all development was approved through the City's planned unit development (PUD) process. Although a PUD ordinance can be a useful tool that allows flexibility for creative and innovative development, when nearly all development seeks approval as a PUD, it can dilute the original intent and overall effectiveness of the code. The PUD ordinance was completely revised to ensure modifications in underlying zoning regulations accrue tangible benefits to the City and work to conform with the general planning policies of the City's Comprehensive Plan and other policy documents.



City of Bloomington, IL Zoning Ordinance and Downtown Neighborhoods Study

The City of Bloomington, with the assistance of Houseal Lavigne, underwent the process of creating an entirely new zoning ordinance and map to better align City ordinances with their recently adopted Comprehensive Plan. The new ordinance aims to foster the use and development of land in an orderly manner with consideration given to the City's social, environmental, economic, and physical development goals and objectives. Through targeted amendments, the City amended district standards and eliminated the majority of nonconforming properties, streamlined district and use standards, enhanced design standards, clarified and modernized administrative procedures, established a new planned development process, and brought the ordinance into compliance with all relevant state and federal regulations.

After the adoption of the zoning ordinance, Houseal Lavigne was retained by the City once again to perform an analysis of the residential areas surrounding their Downtown, develop policy direction for how the neighborhoods should redevelop going forward, and create a new zoning district that balances historic preservation, reinvestment, and gentrification.



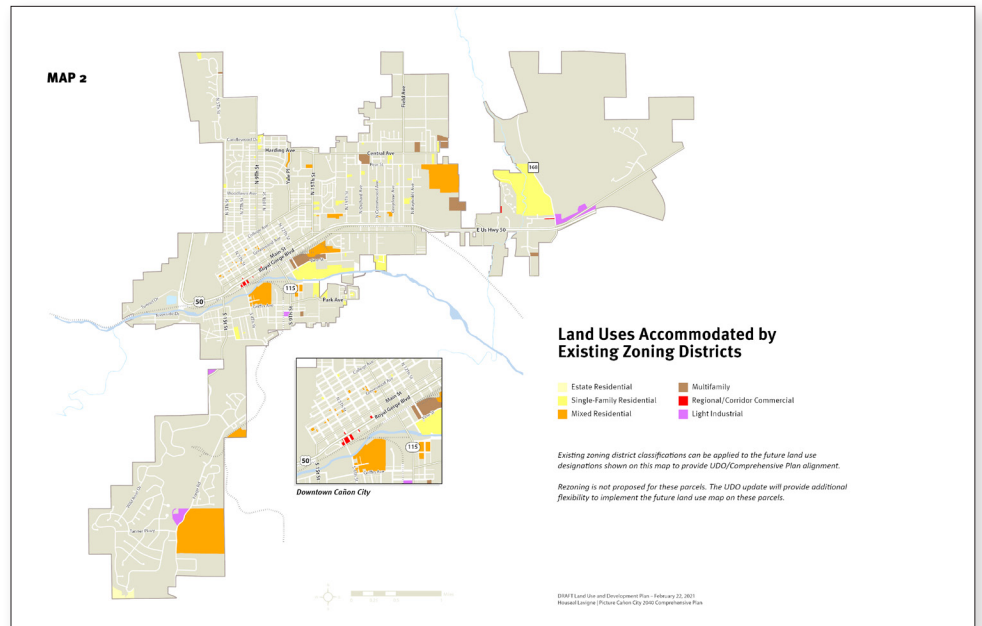
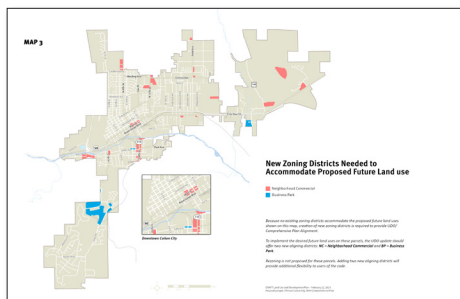
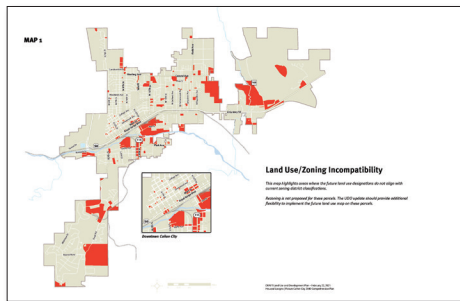
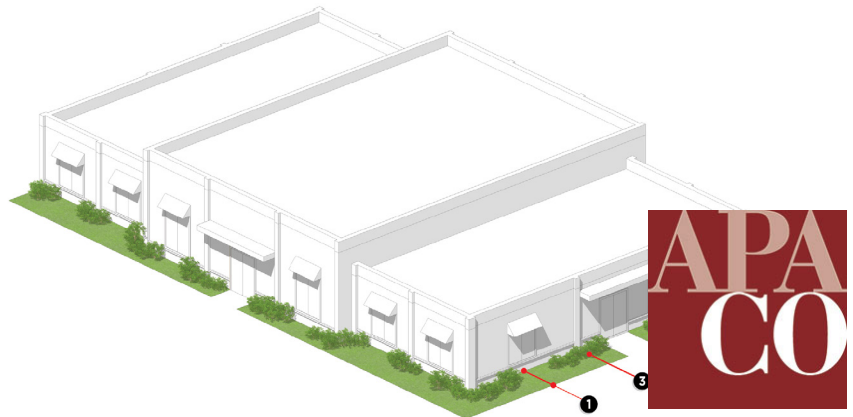
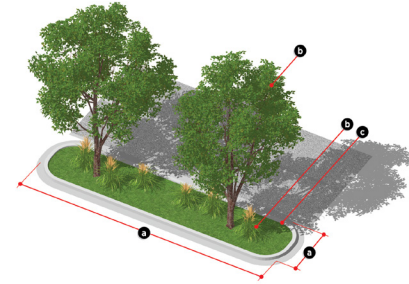
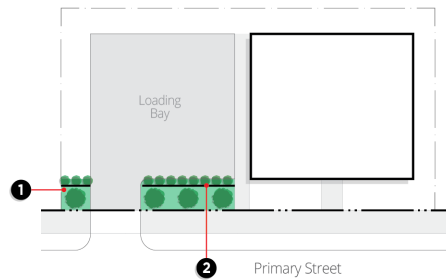
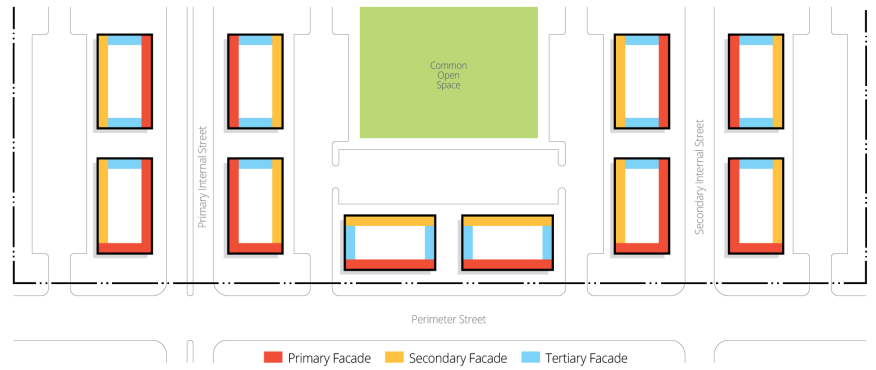
Cañon City, Colorado Picture Cañon City Comprehensive Plan and UDC

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).

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.

The UDC update aligned regulations with the plan by updating district purpose statements and standards, establishing city-wide landscape and screening requirements that incentivize pedestrian oriented building siting, and creating a Reed vs. The Town of Gilbert compliant sign ordinance that incentivizes higher quality signs and accommodates and encourages the unique sign types seen throughout the community.

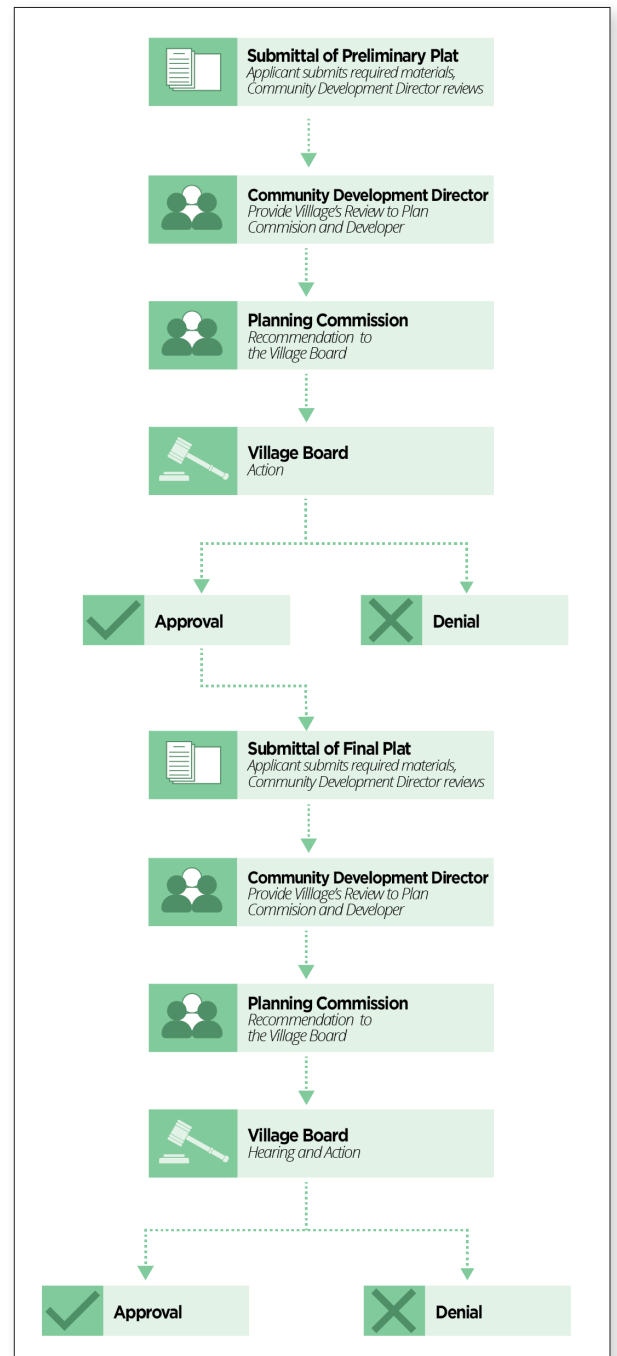
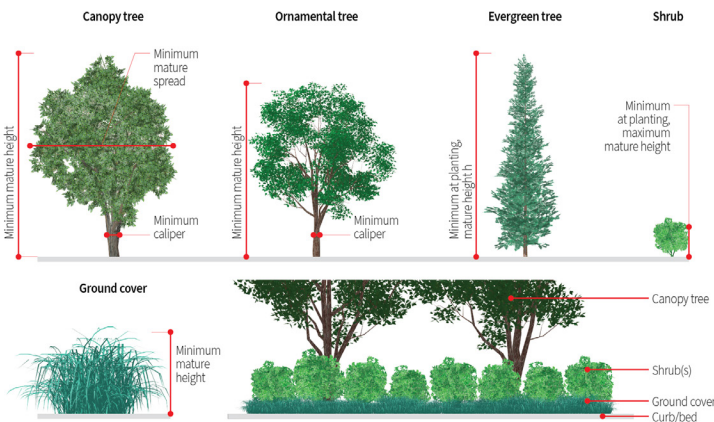
The UDC update also amended the City's review and approval procedures to ensure fair, consistent, and appropriate review for all new development including new subdivision and planned development processes as well as extended administrative review allowances.



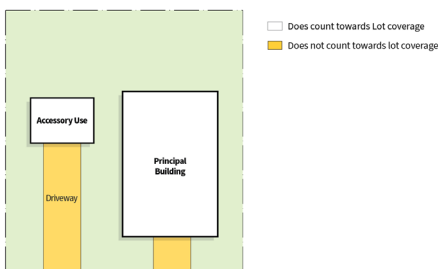
Village of Carol Stream, IL Unified Development Ordinance

The Village of Carol Stream retained Houseal Lavigne to update and consolidate its zoning, subdivision, and sign regulations into a new Unified Development Ordinance (UDO) with the goal of aligning regulations with the Village's Comprehensive Plan, modernizing standards that were originally adopted nearly three decades ago, and improving the overall organization and function of all land development regulations. To accomplish the comprehensive plan's goal of the continued development of the Ross Ferraro Town Center as a community focal point, a new zoning district was developed to better regulate the unique area.

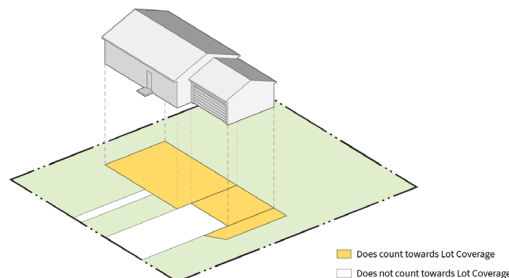
The Village's other zoning districts were all examined and repositioned to better accommodate existing development and development identified as desirable in the Comprehensive Plan. For example, two existing districts were consolidated into a new Office and Service District to support the types of employment generating uses recommended in the Comprehensive Plan. Additionally, to improve compatibility of adjacent dissimilar land uses, new landscape and screening standards were established.



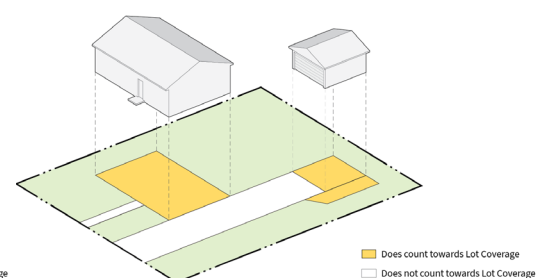
Calculating Dimensions, Lot Coverage
3-8 (F)(3)



Calculating Dimensions, Lot Coverage
3-8 (F)(3)



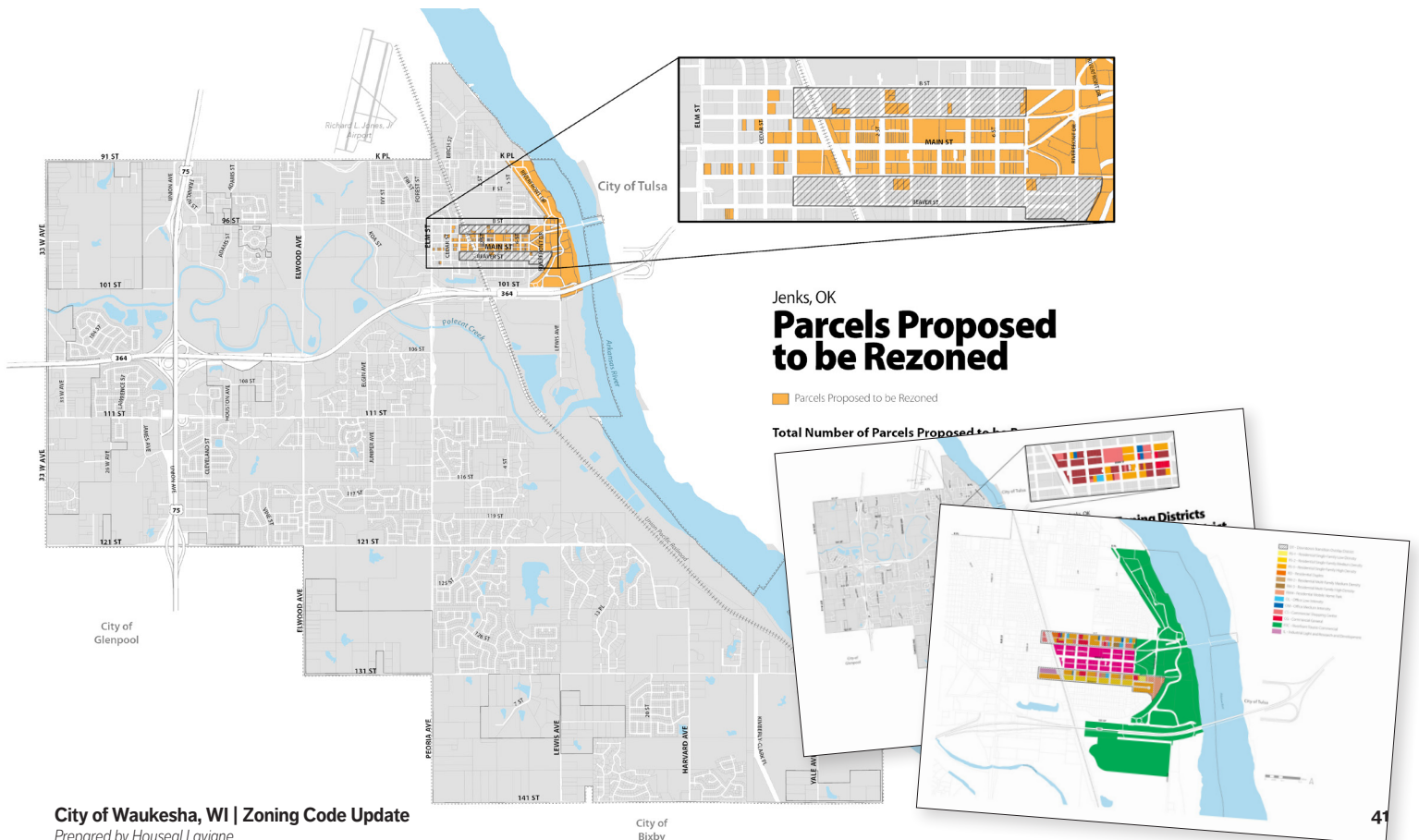
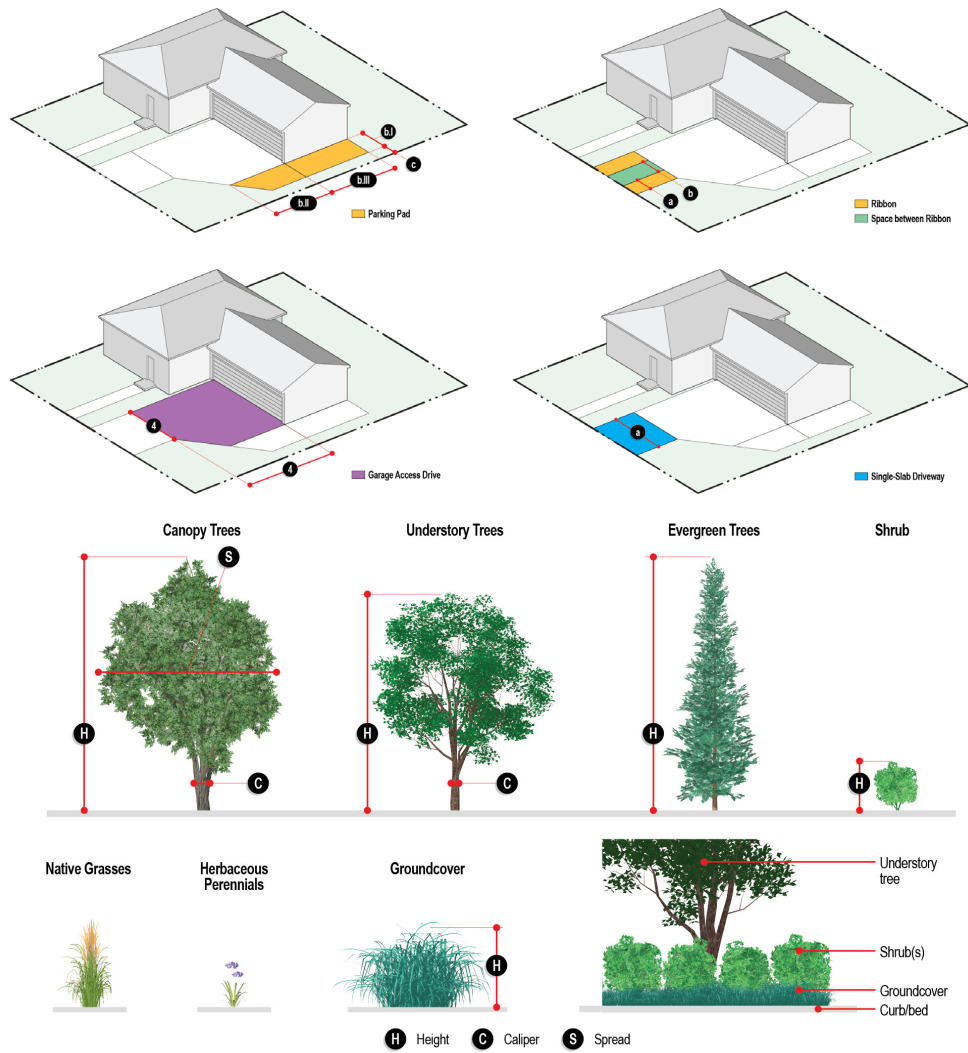
Calculating Dimensions, Lot Coverage
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Jenks, Oklahoma

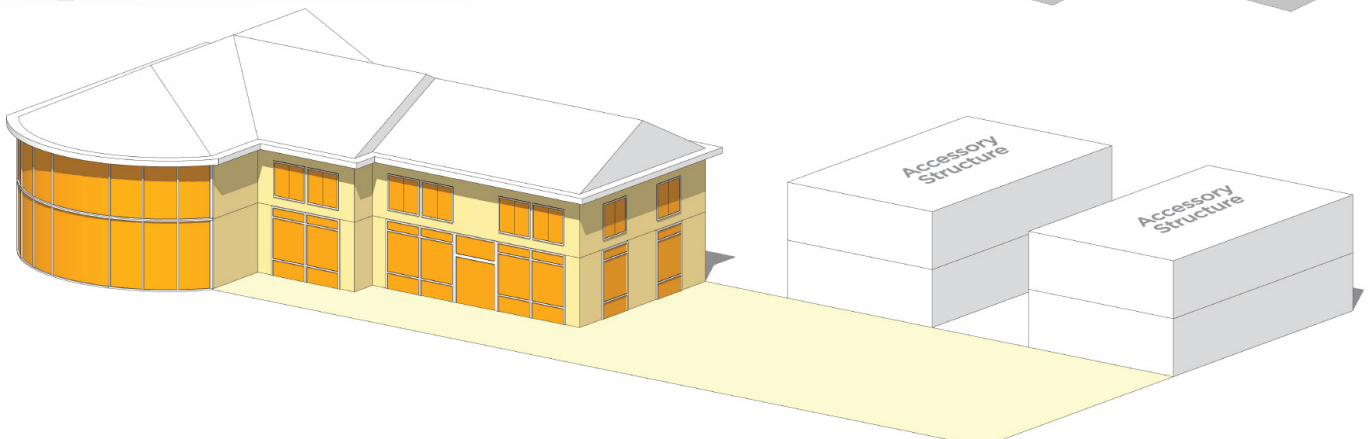
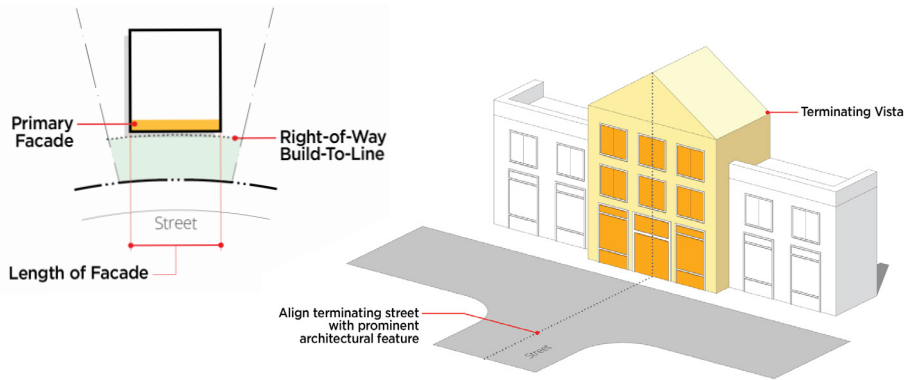
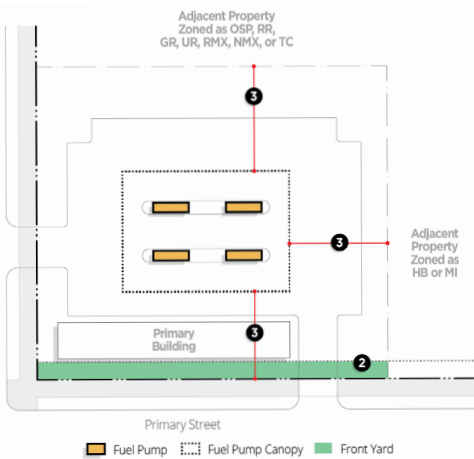
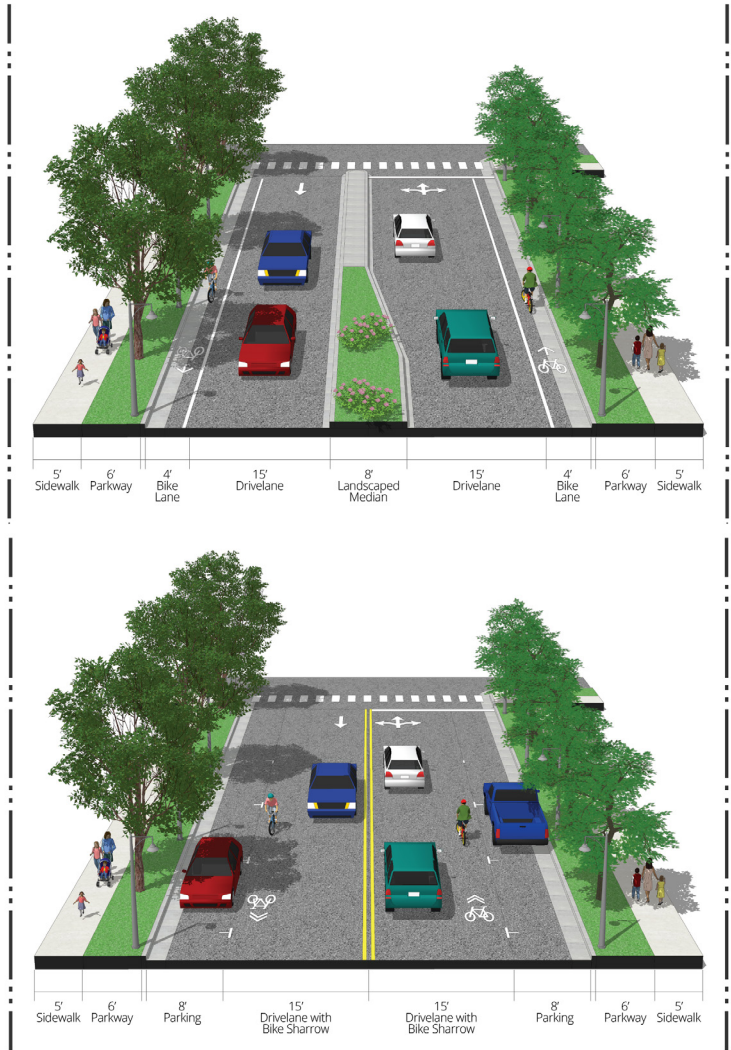
Comprehensive Plan and Unified Development Ordinance

Needing a new plan to guide the community through the evolution from a small suburban town to a fully built-out and vibrant city, the city of Jenks engaged Houseal Lavigne to prepare a new comprehensive plan to manage and guide the rapid growth while preserving and enhancing the community's beloved small town charm and sense of place. Building upon a robust community outreach campaign, the new plan focuses on guiding growth in targeted areas, prioritizing investment in the Riverfront and Downtown, improving connectivity and pedestrian mobility within and between key areas, and strategically enhancing park and open space amenities to bolster quality of life for residents. The Horizon Jenks Comprehensive Plan was followed up by the development of a new Unified Development Code by Houseal Lavigne, to ensure plan recommendations are supported by the regulations needed to help realize the community's vision.



Town of Knightdale, North Carolina
Unified Development Ordinance Update

In 2019, the Town of Knightdale engaged Houseal Lavigne to update their form-based Unified Development Ordinance (UDO) to align with their recently adopted KnightdaleNext 2035 Comprehensive Plan and to comply with changes to state statute (160D). KnightdaleNext 2035 establishes a vision for the community as it transitions from a suburb of Raleigh to an urban community. To realize this transition, the UDO was updated to accommodate the retrofit of auto-oriented commercial corridors into walkable, mixed use centers through the introduction of standards for new building types including outlot/liner commercial buildings, requirements for public gathering space as a part of all new nonresidential and multifamily development, and the establishment of multi-building development standards. The updated UDO also works to implement the Town's goal of providing a wider variety of housing options through expanding allowances for accessory dwellings and requiring a mix of housing types in new residential subdivisions.



Village of Roscoe, IL Zoning Ordinance Update

The Village of Roscoe is a growing community along the Rock River, approximately 80 miles northwest of Chicago. Prior to the update, Roscoe's Zoning Ordinance had not been comprehensively updated since its adoption in the 1970s, and for decades had not been an effective tool for achieving desirable development. The Ordinance lacked definitions, guidance regarding the applicability of various standards, and was inconsistent with case law and state legislation. The structure of the document was inefficient and confusing to both Village staff and users. To modernize and improve the user-friendliness of the Ordinance, Roscoe engaged Houseal Lavigne to update it in accordance with current planning standards and best practices, and to align with and support the Village's Comprehensive Plan. The new Zoning Ordinance and Map include an easy-to-use chapter structure that guides users through the development process by minimizing cross referencing and utilizing graphics, diagrams, charts, and tables to convey regulations and clarify interpretations.

- (G) **Maintenance.** Upon completion, all parking areas shall be properly maintained at all times, without potholes, broken curbing, or other irregularities.
- (H) **Drainage.** Parking and loading areas shall be graded and surface water accumulated within the area. The method of public facilities shall be subject to approval of the Village Engineer.
- (I) **Surfacing.** All required parking and loading spaces and areas in R1 and R2 districts shall be paved with concrete, bituminous equivalent material as approved by the Village Engineer. All loading spaces and access drives for all commercial or industrial shall be paved with concrete or bituminous pavement:

155.10.9 – STACKING SPACES FOR DRIVE-THROUGH

- (A) **Required Stacking Spaces.** Every drive-through facility shall have a minimum number of stacking spaces as detailed in Table 155.10.9(A): Drive-Through Stacking Space Requirements.

Use	Minimum Stack	Notes
Automated Teller Machine	2 per machine	Yes
Bank Teller Lane	2 per lane	Yes
Restaurant	10 per order box	No
Carwash, Automatic	5 per stall	No
Carwash, Manual	2 per stall	No
Oil Change Shop	2 per service bay	No
Pharmacy	4 per lane	No
Other	at the discretion of the Village Engineer	No

Graphic 10.2: Dimensional Standards for Parking Spaces and Aisles



lots that are typical of the development that predominates the Village's single-family neighborhoods.

- (D) **R2 – Two-Family Residential District.** The R2 – Two-Family Residential District is intended to accommodate increased population density compared to the R-1 District, including detached single-family homes, duplexes, and townhomes.
- (E) **RM – Multi-Family Residential District.** The RM – Multi-Family Residential District is intended to accommodate more compact and dense residential development compared to the R1 and R2 Districts, consisting of duplexes, townhomes, and multi-family residential development.

155.3.2 – RESIDENTIAL BULK STANDARDS

- (A) All development in Residential Districts must comply with the requirements in Table 155.3(A): Residential Districts – Bulk and Yard Standards unless otherwise expressly stated.

District	Minimum Lot Size			Development Intensity			Min. Yards		
	Area	Width Interior Lot	Min. Depth	Max. Height	Max. Lot Coverage	Min. Site Area per DU	Front (1)	Side	Rear
RE	22,000 sf	110 ft	150 ft	35 ft	25%	22,000 sf	30 ft	30 ft	30 ft
R1	9,500 sf	75 ft	125 ft	35 ft	30%	9,500 sf	30 ft	15 ft	30 ft
R2	15,000 sf	100 ft	125 ft	35 ft	30%	7,500 sf	30 ft	15 ft	30 ft
RM	19,800 sf	100 ft	125 ft	35 ft	30%	3,300 sf	30 ft	15 ft	30 ft

(1) The required front yard setback of lots fronting Main Street between Grove Street and Elevator Street or fronting Elevator Street between Highway 251 and Pearl Street shall be a minimum of ten (10) feet and a maximum of twenty (20) feet.

Graphic 3.1: Residential Required Yards



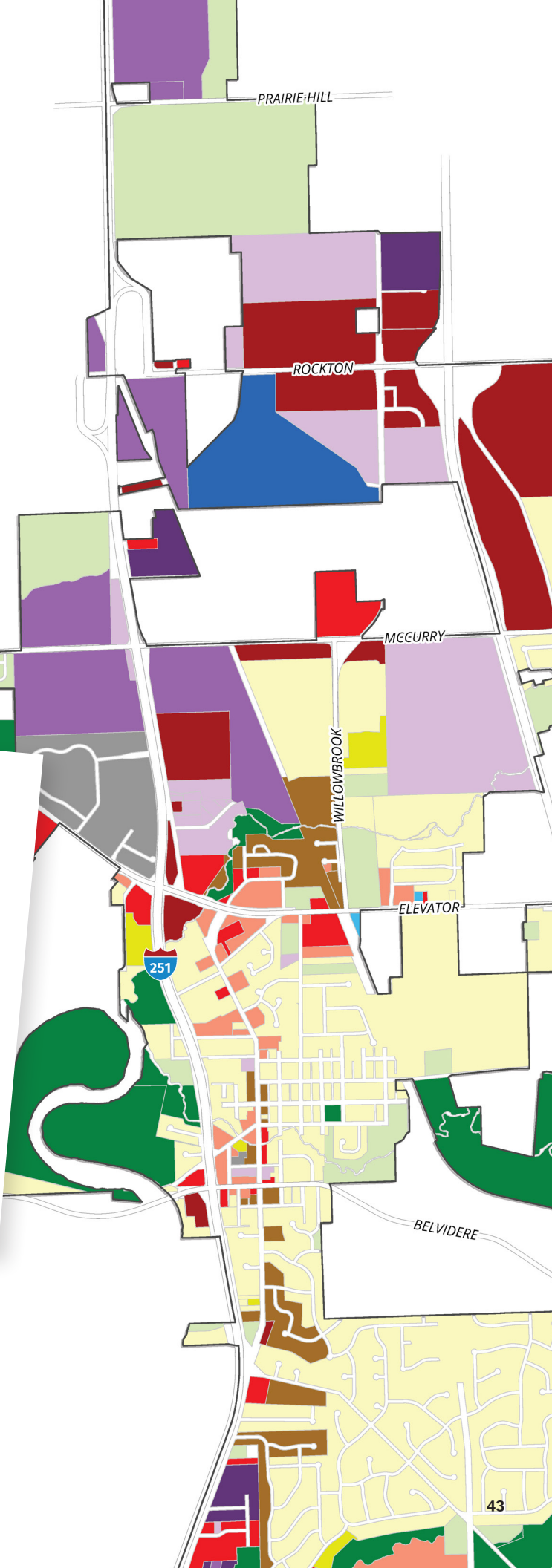
and gutter or concrete barrier curb is installed around all islands for all initial uses of less than four (4) feet are demonstrated to be more near, the alternatives may be considered.

walks, pedestrian circulation areas, sidewalks, or bumper guards so that no alternative is required for interior

Performance Standards
Photometric calculations shall be required for all lighting.

Each parking space is required to be a minimum of 10 feet wide and 20 feet long. The minimum length of each space, width or white. The minimum length of each space, width or white. The minimum length of each space, width or white.

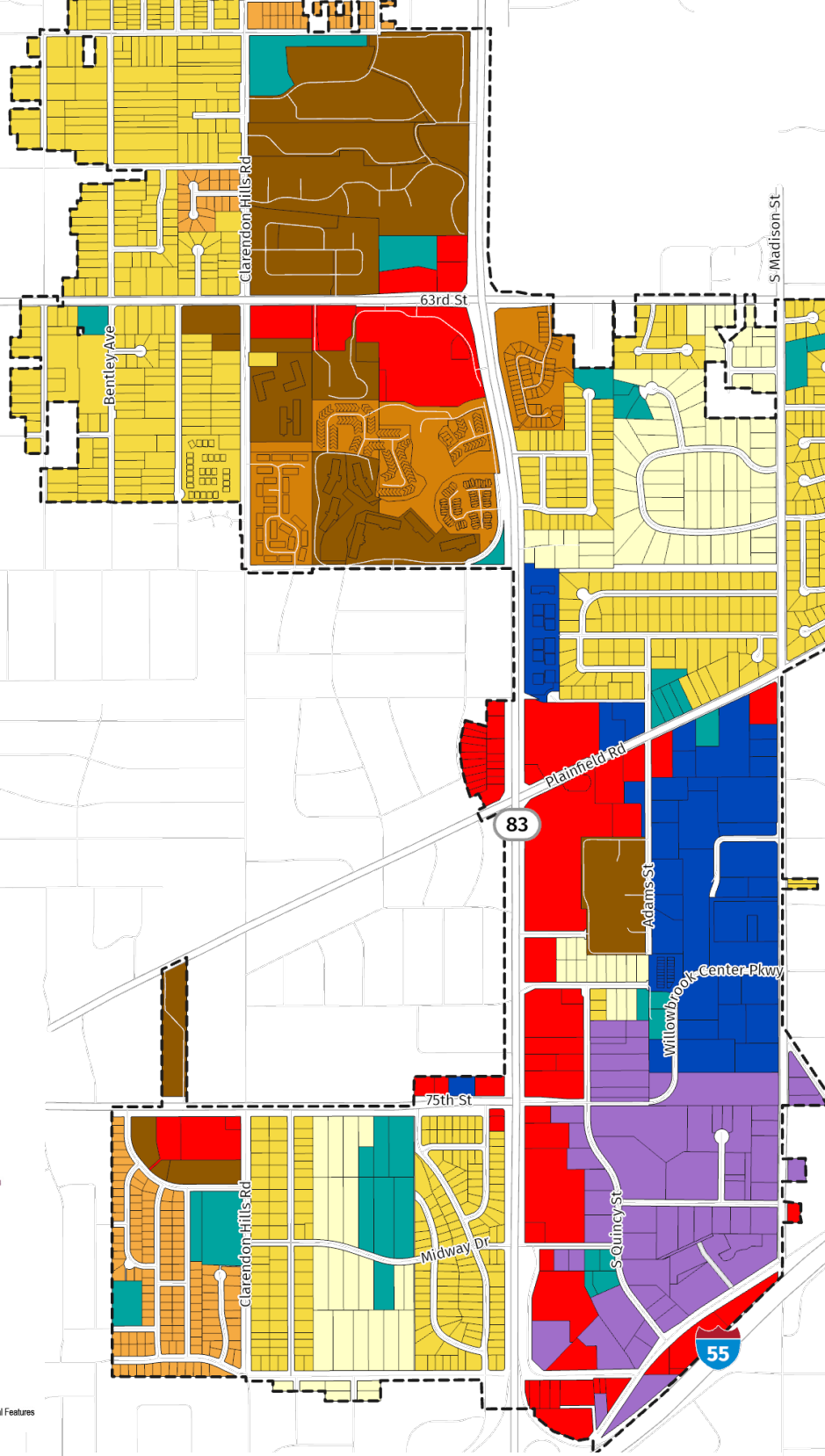
Zoning Ordinance



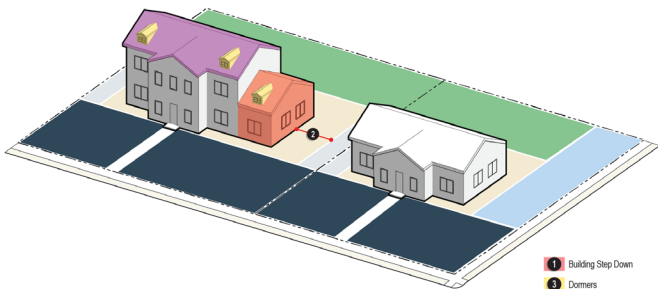
Village of Willowbrook, IL

Unified Development Ordinance

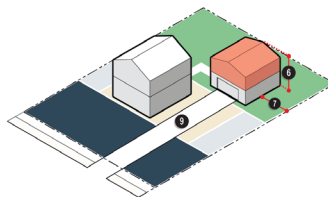
Houseal Lavigne worked with the Village of Willowbrook to conduct a comprehensive review and update to the Village's land development regulations in order to adopt a new Unified Development Ordinance (UDO). The UDO consolidates all of the Village's development regulations (i.e. Sign, Zoning, and Subdivision Codes) into a single easy-to-use document. The Village of Willowbrook had not comprehensively updated its zoning ordinance since the community was originally incorporated in the early 1960s when meaning a thorough update and modernization was required. The review of the Village's existing regulations was coordinated through a series of public workshops led by Houseal Lavigne with the Village Board, the Planning and Zoning Commission, and Village staff. The new UDO and Zoning Map is a culmination of discussions during these workshops. The new UDO is a user-friendly and streamlined document that better addresses the needs of Willowbrook as a built out community by consolidating zoning districts, rightsizing standards to reflect existing conditions, enhancing the planned unit development process, and incorporating diagrams, flowcharts, and visualizations to clarify interpretation and other policy documents.



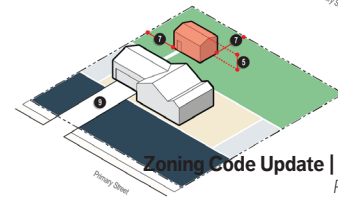
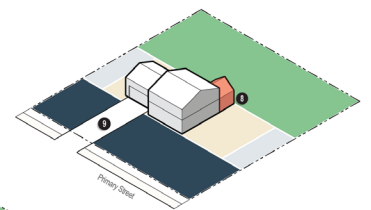
- 1 Articulation
- 2 Establishing Architectural Features



- 1 Building Step Down
- 2 Dormers
- 3 Sloping Roof
- 4 Front Yard
- 5 Exterior Side Yard
- 6 Interior Side Setback
- 7 Rear Yard



- 1 Accessory Dwelling Unit
- 2 Front Setback
- 3 Rear Setback
- 4 Interior Side Setback
- 5 Buildable Area





Birchline Planning LLC Representative Projects

Zoning Updates for Water Quality and Green Infrastructure Enhancement: Cities of Green Bay, Superior, and Bayfield

Client Contact: Ms. Celestine Jeffries, Chief of Staff; Celestine.Jeffreys@greenbaywi.gov and Ms. Ada Tse, Water Resources Specialist; tsea@ci.superior.wi.us; 715-394-0392

2018 – present ☞ Clients: Cities of Green Bay, Superior & Bayfield

As part of their coastal resilience initiatives, the cities of Green Bay, Superior and Bayfield each retained Birchline Planning LLC to review and audit local codes, policies, plans and ordinances for opportunities to improve water quality, flood resilience, and the use of green infrastructure. In each community, Birchline conducted internal and external stakeholder interviews to assess opportunities and challenges, and then developed recommended amendments, policies, and program strategies best suited to each community's capacity and needs. In Green Bay, extensive changes are in the works to the City's landscape and site plan standards to support greater "greening" and the use of green infrastructure. Superior has adopted several of the recommended zoning and code amendments, notably new stream corridor protection language. For the City of Bayfield, Birchline developed a native lawn ordinance, and also worked with Hey & Associates and Bayfield County to develop a flow path map and assessment tool that the Sustainability Task force will use to identify pilot locations for green infrastructure.

Metropolitan Milwaukee Green Infrastructure Code & Ordinance Implementation Support

Client Contact : Ms. Breanne Plier, Director of Sustainability ; bplier@mmsd.com

2012-2020 ☞ Client: Milwaukee Metropolitan Sewerage District

Birchline Planning LLC served as the planning and zoning consultant for a multi-year, comprehensive process of evaluating and addressing code and ordinance-related water quality issues in 27 Milwaukee-area municipalities. Birchline has worked with municipal planning and engineering staff, local consultants, and Milwaukee-area landscape professionals to provide specific and practical strategies for updating zoning codes (particularly landscape standards) to enable the use of green infrastructure techniques that satisfy MMSD Chapter 13 and Wisconsin DNR permitting requirements. In the most recent phase, Birchline led a series of detailed interviews with municipal staff from planning and zoning, engineering, and municipal managers' offices to assess their specific challenges, such as perceptions about the viability of permeable materials, that must be addressed to meet permitting and green infrastructure requirements. For cities including Bayside, Oak Creek, Wauwatosa, West Allis, and West Milwaukee, Birchline Planning LLC drafted, targeted zoning amendments, such as bioretention landscaping standards for parking lot edges and special overlay districts where additional stormwater management standards apply.

Milwaukee MSD Green Infrastructure Cost & Incentives Study

Client Contact: Ms. Breanne Plier, Director of Sustainability ; bplier@mmsd.com

2018-2019 ☞ Client: Milwaukee Metropolitan Sewerage District

To respond to ongoing challenges around the cost and cost variability of green infrastructure in metropolitan Milwaukee, the Milwaukee Metropolitan Sewerage District retained Birchline Planning LLC to prepare an evaluation of the cost climate around green infrastructure. To understand unit costs and price variability, Birchline led a team with staff from MMSD and Clean Wisconsin to evaluate ten years of data from MMSD-supported green infrastructure projects and bid tabulations and invoices from municipal projects to establish costs for key green infrastructure components including labor, mobilization, materials, and plantings. Working with Clean Wisconsin and the NAIOP-Wisconsin, representing commercial developers and property managers, Birchline convened two workshops with developers, municipal engineers, designers, property managers, and materials suppliers to discuss the cost findings and provide context and input on how GI costs can be controlled and made more predictable. The final report has led, among other recommendations, to important changes in the MMSD Green Infrastructure Partnership Program's reporting and grant administration structure, as well as changes to recommended bid specifications to eliminate sources of cost variability.



City of Dublin Stormwater Manual for Form-Based Coding

2012-13 ☞ Client: *City of Dublin, Ohio* ☞ Project Partner: *Tetra Tech, Inc.*

Following a multi-year process to develop a vision, plan and form-based code to guide development of the historic Bridge Street Corridor district, the City of Dublin, Ohio recognized the need to update its Stormwater Design Manual to ensure that stormwater systems built in the City supported its urban design and environmental goals – and to ensure that stormwater standards are fully compatible with the language and approach of form-based coding. Working as an integrated team with engineering, planning and zoning, and green infrastructure design skills, Tetra Tech, Inc. and Birchline Planning LLC prepared a complete overhaul of the City’s stormwater design standards and treatment specifications, along with recommended changes to the City’s zoning regulations to further its objectives for implementing rain gardens, protecting important soils, and creating a more efficient review process for projects with LID stormwater features. The Bridge Street Corridor’s stormwater standards provide specific design and placement guidance for different types of stormwater treatment based on their compatibility with the defined street families, building types, and open space types in the form-based code. Other components developed included new provisions for shared stormwater systems to support infill development and better site design, and a process for evaluating the feasibility of different LID stormwater practices on redevelopment sites. The new Stormwater Design Manual represents a substantial advance in the field of integrating LID with form-based code principles and will be a model for communities nation-wide.

Town of Duxbury, VT Comprehensive Zoning Update

2017 ☞ Client: *Town of Duxbury* ☞ Project Partner: *Bob Barber, FAICP, Orion Planning + Design*

In the wake of a successful Town Plan update, the Town of Duxbury enlisted the team of Birchline Planning and Orion Planning + Design to redraft the Town’s zoning regulations. At the outset a matrix linking Town Plan goals to specific action steps and potential zoning changes was prepared so that all involved clearly understood the linkages between Town Plan policies and zoning - as well as what zoning amendments could not accomplish, and where other policy steps were required. The team completed a full re-draft through a structured process of Planning Commission and joint Board meetings, one-on-one work sessions with the DRB chairman and Zoning Administrator, and detailed work to integrate road and curb cut policy with the new zoning regulations. A mobile workshop was held in Duxbury Village to help visualize how setback and coverage changes, along with new allowances for accessory dwelling and home occupations in detached structures, would strengthen the desired character of the Village.

City of Rutland, VT Zoning Bylaw Development

Client Contact: *Ms. Tara Kelly, Zoning Administrator; tarak@rutlandcity.org*

2017-2018 ☞ Client: *City of Rutland*

As the City of Rutland works to revitalize its neighborhoods and downtown, Birchline Planning LLC is helping the City of Rutland’s Zoning Bylaw Advisory Group evaluate where and how the City’s zoning and historic preservation standards can be updated to achieve several different and challenging objectives: Protecting the character and quality of single-family neighborhoods; enhancing the visual quality and transportation function of properties along Routes 4 and 7 as redevelopment occurs; overhauling the administrative process and responsibilities for architectural and design review; and providing a stronger basis for effective enforcement of permit conditions. Birchline is acting as a facilitator to Town staff and has provided an array of services including stakeholder and ZBAG meeting facilitation, drafting, research, and education on design standards. The City and Birchline completed the draft ordinance in December 2018, and will present the draft for hearings in early 2019.

SP Land Company - Killington (VT) Village Land Entitlements

Client Contact: *Mr. Steve Selbo, Steven.Selbo@e2mpartners.com*

2013-2019 ☞ Client: *SP Land Company LLC/Killington-Pico Ski Resort Partners*

Birchline Planning LLC has completed the municipal entitlements process on behalf of SP Land Company, the real estate developer for Vermont’s Killington Resort, and Killington-Pico Ski Resort Partners. The project, planned over 30 years, includes major reconstruction and relocation of the Killington Mountain Road, implementation of a phased Water Quality Remediation Plan (WQRP) for restoration of Roaring Brook, construction of roughly 2,000 housing units, coordination with new wells and water distribution networks, and a complete re-working of the Resort’s transportation and parking network. Birchline Planning LLC’s assistance has included preparation of Planned Unit Development and Site Plan applications, coordination with consultants, attorneys, Town staff, and State permitting agencies, public presentations, and Findings of Fact.

References

Our Project Team has extensive experience working on similar projects and have developed numerous Zoning Code Updates. Below is a list of communities we have completed plans for and contact information for these references.

Firm	Client	Project(s)	Client Contact
Houseal Lavigne	Oak Creek, WI	Zoning and Sign Ordinance Update	Kari Papelbon, Senior Planner kpapelbon@oakcreekwi.gov (414) 766-7027
Houseal Lavigne	Verona, WI	Zoning and Sign Ordinance Update	Adam Sayre, Former Community Development Director Adam.Sayre@fitchburgwi.gov (608) 270-4209
Houseal Lavigne & Birchline Planning	Franklin, WI	Unified Development Ordinance Update	Regulo Martinez-Montilva, Principal Planner RMartinez-Montilva@franklinwi.gov (414) 427-7564
Birchline Planning	Greenbay, Superior, Bayfield - WI	Zoning Updates for Water Quality and Green Infrastructure Enhancement:	Celestine Jeffreys, Chief of Staff Celestine.Jeffreys@greenbaywi.gov Ms. Ada Tse, Water Resources Specialist tsea@ci.superior.wi.us (715) 394-0392
Birchline Planning	Milwaukee Metropolitan Sewerage District	Metropolitan Milwaukee Green Infrastructure Code & Ordinance Implementation Support; Milwaukee MSD Green Infrastructure Cost & Incentives Study	Breanne Plier, Director of Sustainability bpplier@mmsd.com
Birchline Planning	City of Rutland, VT	City of Rutland, VT Zoning Bylaw Development	Tara Kelly, Zoning Administrator tarak@rutlandcity.org

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SECTION 5

FEE PROPOSAL

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Proposed Project Cost

Houseal Lavigne and Birchline Planning propose a not to exceed project budget of **\$187,430**, including all professional fees and directly related project expenses. The project team anticipates spending approximately **1,300 hours** to complete the Waukesha Zoning Code Update.

Hourly Rates by Staff

Houseal Lavigne	Hourly Rate
John Houseal, Principal	\$ 250
Jackie Berg, Project Manager	\$ 160
Ruben Shell, Lead Support	\$ 130
Sujan Shrestha, GIS Lead	\$ 130
Charlie Hogan, Visual Communication Lead	\$ 130
Planner I	\$ 115

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SECTION 6

RELEVANT INFORMATION

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ZONING PRACTICE

Unique Insights | Innovative Approaches | Practical Solutions

Practice Gentle Density



In this Issue: [The Legacy of Single-Family-Only Zoning](#) | [State and Local Responses](#) | [Gentle Density Zoning Standards](#) | [Public Involvement](#) | [Conclusion](#)

Practice Gentle Density

By Jackie Berg, AICP, and John Houseal, FAICP

Cities, towns, and counties across the country are facing a housing availability and affordability crisis. To address the issue, many are developing plans and policies that promote housing stock diversification in both new and infill development scenarios (Figure 1). However, when such development proposals are presented for review and approval, neighbors often fiercely oppose them, citing concern over a perceived change in the character of their neighborhoods and loss in property value and quality of life.

This issue of *Zoning Practice* explores zoning strategies that balance the concerns of residents and the demands of the housing market by accommodating gentle density increases in a context-sensitive manner. From historic downtown neighborhoods to modern residential

subdivisions, the tools presented can be used by planners throughout the country to implement housing policy through regulation.

The Legacy of Single-Family-Only Zoning

Beginning in the early 20th century, zoning was introduced in American cities as a means to control booming development. Beyond land-use control, however, zoning was also motivated by special interests concerned with maintaining existing community character in the face of both cultural and physical change, especially changes in cultural and ethnic makeup resulting from immigration. As written by M. Nolan Gray in *Arbitrary Lines*, “[Zoning’s] defining contribution was to enshrine

Figure 1. A range of medium-density housing types
(Credit: Sightline Institute, Flickr)



the single-family house as the urban ideal, while casting apartments as mere ‘parasites’ and corner grocers as threats to public welfare.”

After the Supreme Court ruled in favor of the constitutionality of zoning in the 1926 *Euclid v Amber* case, the federal government incentivized municipalities across the country to adopt zoning regulations—often by tying the availability of federal funding for transportation infrastructure, housing subsidies, and disaster recovery to zoning implementation. The spread of zoning, especially single-family-only zoning, throughout the country is intimately linked to the rapid suburbanization experienced after World War II. The rise of the suburbs and the segregated, low-density land uses that define them, worsened issues of economic segregation and related racial and ethnic segregation stemming from the high cost of car and home ownership required for suburban life. This transition left many

inner-city neighborhoods in a state of disinvestment, further cementing the sentiment that high-density housing leads to crime, property devaluation, and quality-of-life decline. It also exacerbated the acute housing availability and affordability crisis since the Great Recession by limiting the amount and types of housing that can be built.

State and Local Responses

The legacy of single-family-only zoning and a severe housing affordability crisis have motivated several distinct types of state and local zoning-reform efforts. Some states and local jurisdictions have explored eliminating single-family-only zoning. Many others have taken less-drastic measures to reform regulations related to housing development in an effort to accommodate additional and affordable housing in single-family districts.

Table 1. Select State and City Actions to Eliminate Single-Family-Only Zoning

Jurisdiction	Action
California	Eliminated single-family-only zoning in cities and urbanized unincorporated areas by authorizing property owners to build two dwelling units on any single-family-zoned lot and to subdivide any single-family-zoned lot large enough to split into two lots of at least 1,200 square feet (Senate Bill 9 , 2021)
Charlotte, NC	Rezoned all previously single-family-only districts as Neighborhood 1 Zoning Districts, which permit duplexes and triplexes in addition to single-family homes (Unified Development Ordinance , 2022)
Gainesville, FL	Rezoned all previously single-family-only districts as Neighborhood Residential districts, which permit up to four dwelling units per lot (Ordinance No. 211358 , 2022)
Maine	Eliminated single-family-only zoning by authorizing between two and four dwelling units on any lot in a zoning district that permits housing, depending on whether the lot is located in a designated growth area or has an existing dwelling unit (LD 2003 , 2022)
Minneapolis, MN	Eliminated single-family-only zoning by authorizing up to three dwelling units on any lot in the lowest-intensity residential district (Table 546-1)
Oregon	Eliminated single-family-only zoning for many cities by requiring all cities with populations of at least 1,000 in metropolitan service areas and all other cities with populations of at least 10,000 to permit at least two units on each lot in areas zoned for residential use (HB 2001 , 2019)
Walla Walla, WA	Rezoned all previously single-family-only zones as Neighborhood Residential zones, which permit duplexes, triplexes, fourplexes, and cottage homes in addition to single-family homes (Ordinance 2018-53 , 2018)

Efforts to Eliminate Single-Family-Only Zoning

To combat the issues of housing availability and affordability being faced by communities across the nation, several states and local governments have taken dramatic steps toward eliminating single-family-only zoning (Table 1). Many other communities, like Seattle, have considered eliminating single-family-only zoning but have not been successful due to backlash from residents. Commonly cited concerns related to eliminating single-family-only zoning include a desire to preserve existing community character in order to protect property values, combat crime, maintain traffic conditions, not overburden schools, conserve open space, and more.

Although these concerns are understandable at an emotional level, they often do not hold water in practice. For example, according to a study by Daniel Kuhlmann published in the *Journal of the American Planning Association* in 2021, home values in Minneapolis increased three to five percent in comparison to similar homes outside of the city after local officials adopted a new comprehensive plan proposing the elimination of single-family-only zoning. The study further suggests that the increase in property value is seen most significantly in relatively inexpensive neighborhoods of Minneapolis, helping to lessen the gap between property values and to build equity for lower income homeowners.

Other Efforts to Zone for Housing Affordability

In addition to largely eliminating single-family-only zoning, California,

considered by many as a leader in housing reform, has recently passed a slew of other laws to mitigate the state's housing shortage. For example, [Senate Bill 6](#) (2019) allows for by-right multifamily housing development in all commercial and office districts; [Assembly Bill 2097](#) (2022) eliminates all parking requirements for housing within a half-mile of public transit; and [Senate Bill 478](#) (2021) requires that floor-area-ratio restrictions on multifamily housing be a minimum of 1.0 for developments with three to seven units and 1.25 for developments with eight to 10 units. This last bill also prohibits a local jurisdiction from denying a housing development proposal on the basis that the lot does not meet minimum size requirements.

Some states, such as North Carolina ([§160D-702\(b\)](#)) and Oklahoma ([SB 1713](#), 2020) have passed legislation that prohibits local governments from enacting design standards for one- and two-family housing (as defined by the building code), which includes single-family detached, duplex, and townhome development. The goal of the legislation is to reduce the costs associated with design standards, such as required building materials, roof form, façade articulation or type, glazing, and more.

A larger number of municipalities and counties are adopting incremental zoning reforms, such as allowing accessory dwelling units (ADUs) in single-family zoning districts (Table 2). Known by many names, including granny flats, in-law units, backyard cottages, secondary units, carriage houses, and more, an accessory dwelling unit is a smaller, independent dwelling unit that may be detached,

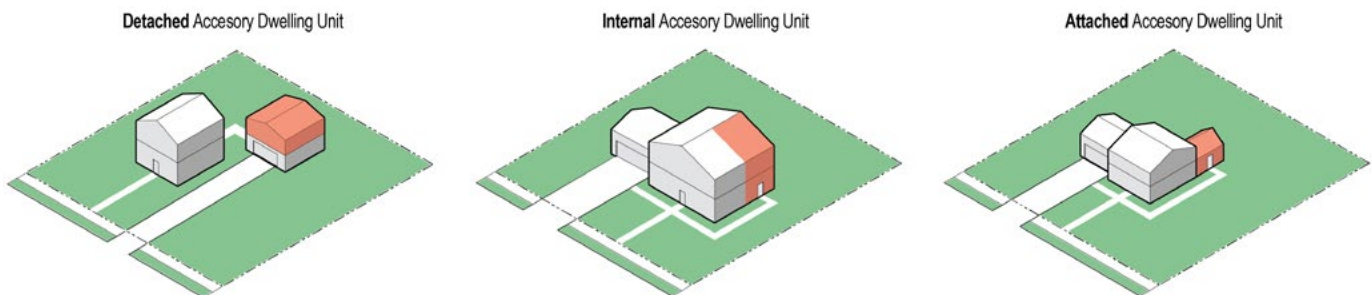


Figure 2. Examples of accessory dwelling unit types (Prepared by Houseal Lavigne)

Jurisdiction	Use Pearmissions
Amherst, MA	Permits one internal, attached, or detached ADU per single-family detached dwelling by right, subject to use-specific standards, in most residential districts (§5.011)
Apple Valley, MN	Permits one internal or attached ADU per single-family detached dwelling with a discretionary use permit, subject to use-specific standards, in its lowest-intensity residential district (§155.382)
Bloomington, IN	Permits one internal, attached, or detached ADU per single-family or duplex dwelling by right, subject to use-specific standards, in all residential districts (§20.03.030(g)(5))
Boise, ID	Permits one internal, attached, or detached ADU per single-family detached dwelling by right, subject to use-specific standards, in most residential districts (§11-06-03.1.A)
Chatham County, NC	Permits one internal, attached, or detached ADU per single-family detached dwelling by right in all residential districts (§10.13)
Columbia, MO	Permits up to two internal, attached, or detached ADUs per lot with a discretionary use permit, subject to use-specific standards, in its lowest-intensity residential district (§29-3.3(gg))
Decatur, GA	Permits one internal, attached, or detached ADU per single-family detached dwelling by right, subject to use-specific standards, in all residential districts (§6.8.3.A)
Fayetteville, AR	Permits one internal or attached and one detached ADU per single-family detached dwelling by right, subject to use-specific standards, in most residential districts (§164.19)
Hudson, OH	Permits one internal, attached, or detached ADU per single-family detached dwelling by right, subject to use-specific standards (§1206.03(a))
Jenks, OK	Permits one internal, attached, or detached ADU per single-family detached dwelling by right, subject to use-specific standards, in multiple residential districts (§16-5-12(B))
Madison, WI	Permits one internal, attached, or detached ADU per lot, subject to use-specific standards, in all districts (§28.151)
Murray, UT	Permits one internal, attached, or detached ADU per single-family detached dwelling by right, subject to use-specific standards, in all residential districts (§17.78)
Nashville, TN	Permits one internal or attached ADU per single-family detached dwelling by right and one detached ADU per single-family dwelling by right, subject to use-specific standards, in multiple residential districts (§17.16.030.G)
Olympia, WA	Permits one internal, attached, or detached ADU per single-family detached dwelling by right, subject to use-specific standards, in all residential districts (§18.04.060.A)
Oxford, MS	Permits one internal, attached, or detached ADU per single-family detached dwelling by right, subject to use-specific standards, in all residential districts (§3.5.6)

Table 2. Select Jurisdictions That Permit ADUs

attached, or internal to the primary dwelling on a parcel (Figure 2). Accessory dwelling units have several benefits, including affordability; providing a source of additional income for homeowners, making homeownership more realistic for moderate income households; and accommodating multigenerational living and supportive housing.

Other states and local governments are reversing bans or limitations on manufactured housing, an affordable alternative to traditional single-family detached homes. For example, California ([Government Code §65852.3](#)), Idaho ([§67-6509A](#)), Kansas ([§12-763](#)), Nevada ([§278.02095](#)), Ohio ([§519.212](#)), and Washington ([§35.21.684](#)) require local jurisdictions to allow manufactured homes in areas zoned for single-family residences; Huntsville, Texas, overturned a ban on the placement of manufactured housing throughout the community; and London, Kentucky, reversed a regulation that required manufactured housing to be located in manufactured home communities (parks) only.

Design standards that control the appearance of infill missing-middle housing are often an important tool to provide fair certainty to residents.

Shortcomings of These Efforts

Like all legislation and regulatory reforms, the approaches discussed in the previous sections have their shortcomings. For example, much of the legislation recently passed in California introduces blanket requirements across all communities, regardless of their characteristics. However, in a state as large as California, characteristics such as slope, wildfire hazard, and flood risk can significantly impact how new housing formats and additional housing units overall are best regulated in a community.

The North Carolina and Oklahoma prohibitions on design standards for one- and two-family housing have made it

difficult for some communities to introduce missing-middle housing as an allowed infill housing type in established neighborhoods. Infill missing-middle housing in existing single-family only neighborhoods is an effective approach to accommodating affordable housing throughout a community and leveraging existing infrastructure to serve a greater number of people. Design standards that control the appearance of infill missing-middle housing are often an important tool to provide fair certainty to residents. Knowing that the character of their neighborhoods will not be fundamentally altered, residents tend to not protest the allowance of diversified housing, streamlining initial regulation adoption and later development approval.

Just as design standards can make infill missing-middle housing more palatable for residents, design and use standards can make ADUs more acceptable as well. The vast majority of the communities that allow ADUs today have some design and use standards. The primary topics regulated are unit type (i.e., detached, attached, or internal); bulk and mass; location on a lot; location of unit entry; parking and access; design in relation to primary and adjacent dwellings; and requirements for the owner of the property to use either the principal or accessory dwelling as their primary residence. Although these standards can be helpful in ensuring that ADUs blend into the character of neighborhoods, maintaining the appearance of a single-family detached neighborhood at the right-of-way, they can also severely limit the number of ADUs that can be built. The most limiting regulations are often lot coverage restrictions and parking requirements.

Another significant barrier to the development of missing-middle housing in both infill and new development scenarios is the discretionary review process. Requiring special or conditional use approval, conditional district rezoning, architectural review commission approval, or the wide variety of other discretionary review procedures employed by municipalities and counties can add to the time and, therefore, the cost of development. Discretionary review requirements also run the risk of denying approval to development proposals that

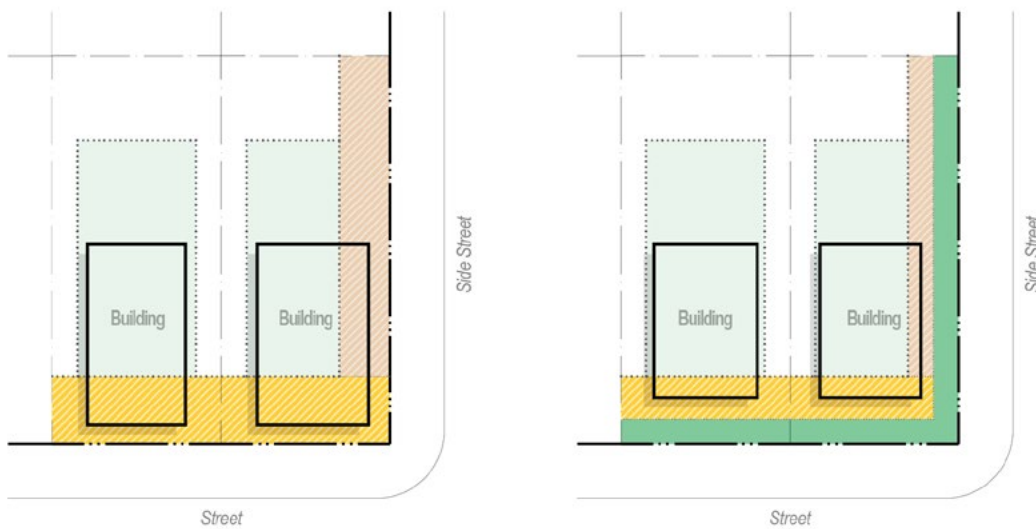


Figure 3. Build-to zone (Prepared by Houseal Lavigne)

- Front Yard Build-to-Zone
- Exterior Side Build-To-Zone
- Front/Exterior Yard Setback
- Buildable Area

otherwise meet the requirements of regulations, including design standards and other measures put in place to provide fair certainty to neighbors and applicants.

Gentle Density Zoning Standards

Learning from and building off of the successes and setbacks highlighted previously, the following section focuses on how local jurisdictions can accommodate and encourage the development of missing-middle housing in new development and infill development scenarios.

Bulk and Dimensional Standards

Bulk and dimensional standards, including lot area and width standards, setback requirements, and height and coverage restrictions, can play a significant role in blending missing-middle housing types into new and existing neighborhoods.

For new neighborhoods, municipalities and counties should consider controlling density through minimum lot area and minimum lot area per dwelling unit standards. As always, the minimum lot area requirement will establish the base lot size for the district. The minimum lot area per dwelling unit standard, however, will ensure that missing-middle housing types like triplexes and quadplexes have a proportional amount of open space to their

single-family detached and duplex neighbors. The minimum lot area per dwelling unit could be set at half of the minimum lot area requirement to accommodate duplexes in the same manner as single-family detached dwellings.

Additionally, municipalities and counties should consider establishing a “build-to zone” that applies to all housing types in the same manner (Figure 3). This will ensure that the rhythm of development from the right-of-way is consistent, making the blend of housing types look more seamless.

If eliminating lot area and width requirements is not realistic, municipalities can work to promote reinvestment in existing housing, especially naturally occurring affordable housing, by minimizing nonconformities. To accomplish this, communities can conduct a nonconformities analysis that compares the existing minimum lot area and width requirements established for a zoning district with existing development within that district. Using tools such as ArcGIS, the analysis should first determine the number of parcels in each district that do not conform with the existing lot area and width requirements (Figure 4). Then the analysis should determine the number of parcels in each district that would remain nonconforming if the lot area and width requirements were reduced (Figure 5).

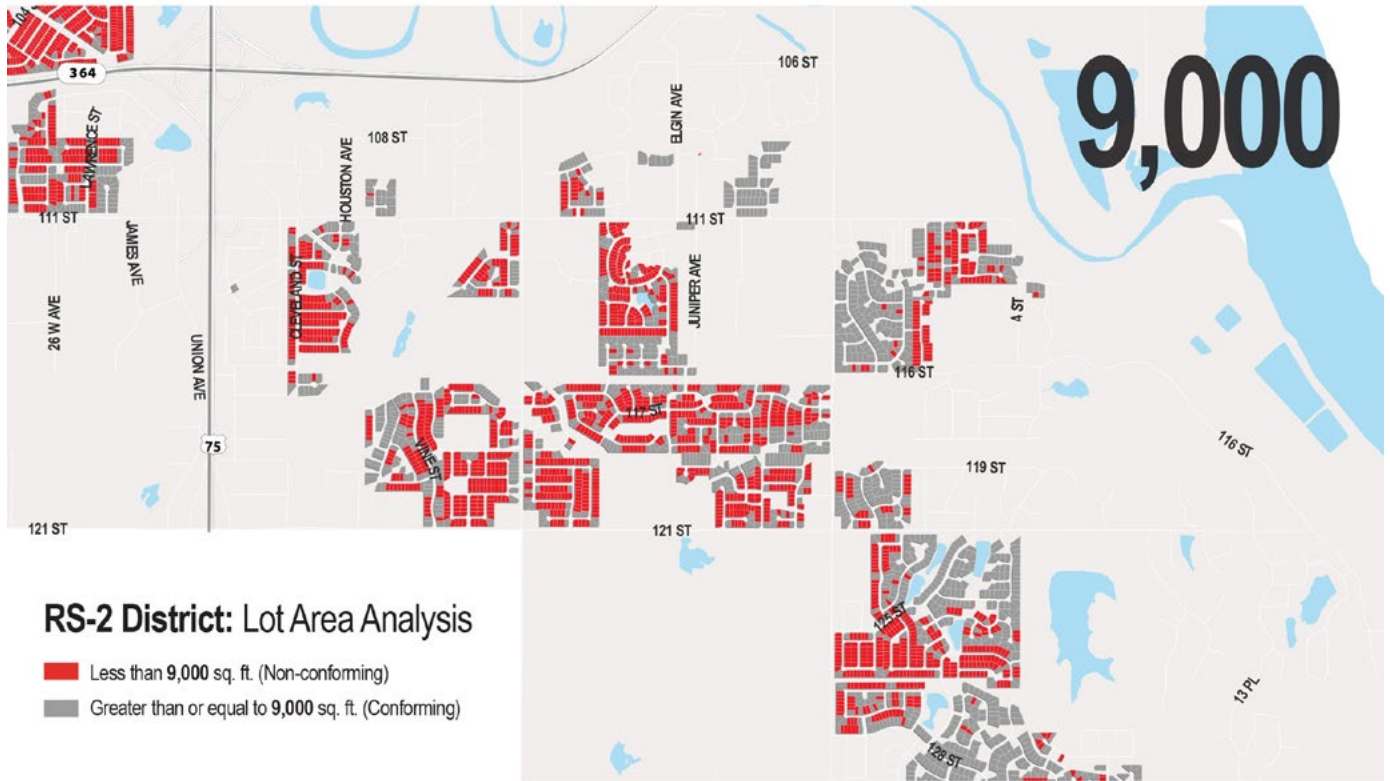


Figure 4. Nonconformities under existing lot area requirements (Prepared by Houseal Lavigne using ArcGIS Software)

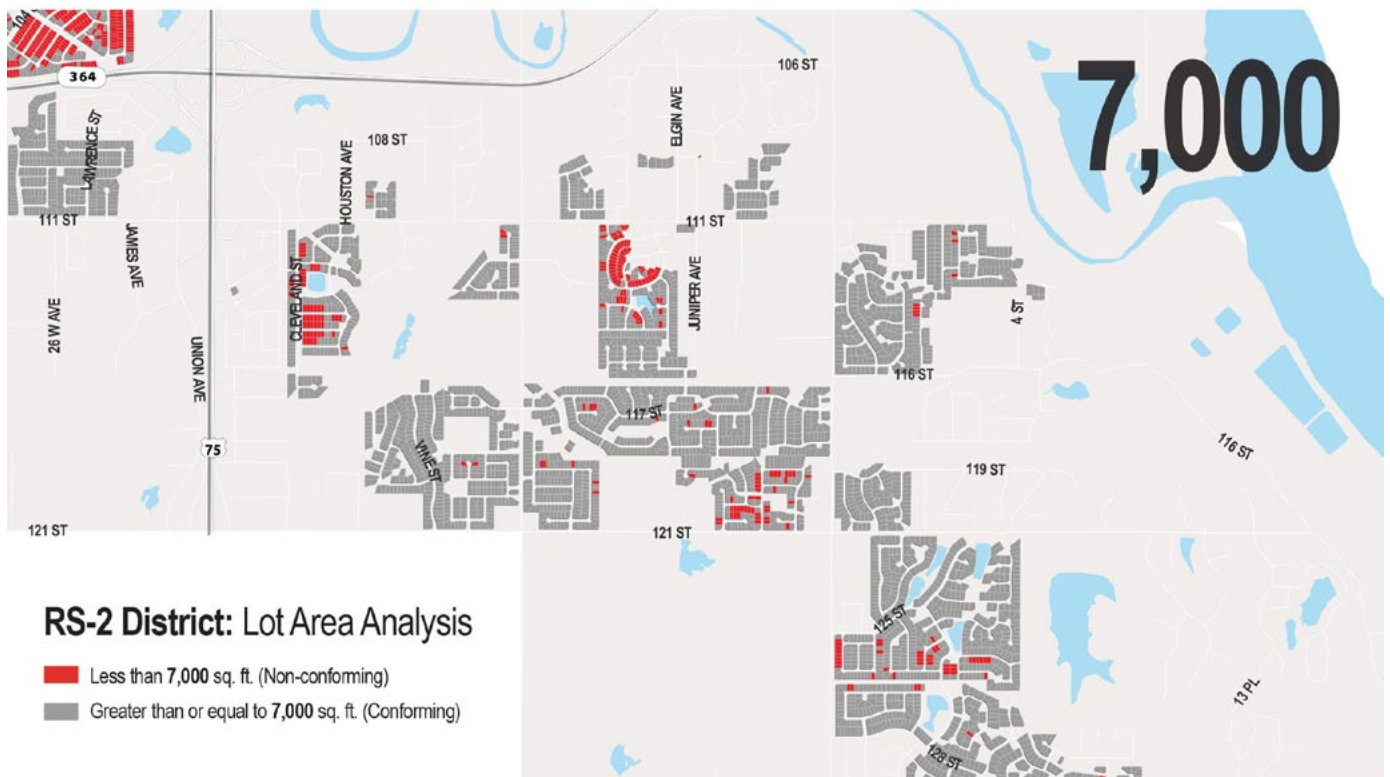


Figure 5. Nonconformities with reduced lot area requirements (Prepared by Houseal Lavigne using ArcGIS Software)

If eliminating lot area and width requirements is not realistic, municipalities can work to promote reinvestment in existing housing, especially naturally occurring affordable housing, by minimizing nonconformities.

To ensure that reducing the lot area and width minimums would not alter the character of established neighborhoods (a common argument against this type of zoning reform), alternative minimums can be tested to see if they would create new opportunities for existing lots to be subdivided. New opportunities for subdivision include lots that are at least two times greater in area and twice the width of the alternative lot area and width minimums being considered. Again, using a tool such as ArcGIS, new opportunities for subdivision can be examined to determine whether they could lead to a change in neighborhood character. For example, if there is a concentration of parcels in a neighborhood that could be subdivided due to the proposed standards changing, would such an amendment result in a shift in neighborhood character. In some instances, it may be most appropriate for these parcels to be rezoned to another zoning classification that requires larger lots, thus preventing the creation of several new lots in an established area. In other circumstances, the alternative minimums should be increased district wide to prevent opportunities for subdivision. However, if the parcels that represent new subdivision opportunities are scattered throughout neighborhoods, rather than clustered together, and surrounded by parcels that are more consistent with the alternative minimums, the new subdivision opportunities would not result in a shift in neighborhood character.

Infill development is most common in older neighborhoods where it is economically viable to tear down aging structures and build new ones. These

types of neighborhoods were often developed organically over time, in some cases before zoning regulations were put in place, and do not have consistent bulk and dimensional standards from one property to another. In these circumstances, municipalities should consider eliminating or amending minimum lot area and width requirements to encourage and accommodate reinvestment. Additionally, municipalities should consider adopting an averaging or variable approach to yard setbacks. For example, in Bloomington, Illinois' Downtown Residence District, the required front yard setback is the average of the front yard setbacks along the same side of the street and on the same block ([§44-403.B\(2\)](#)).

Use Standards

Use standards are supplementary requirements for uses regardless of whether they are allowed by-right or by discretionary approval. The use standards highlighted below are equally appropriate in both new and infill development.

Both new and existing neighborhoods can benefit from standards for higher-density missing-middle housing types that regulate the allowed location of the housing type on a block and its related siting. For example, Bentonville, Arkansas' Downtown Neighborhood (DN) districts distinguish between block-end and mid-block locations and allows higher densities at the former more liberally than the latter ([§401.07-B](#)). The DN districts also require that all residential buildings be oriented toward a public street and that all parking garages, lots, or spaces be located in the rear or interior side yard, rather than in the front yard ([Figure 6](#)).

Municipalities and counties should also consider allowing single-family homes to be converted to multifamily buildings. Converting homes, especially historic properties, can help to extend the economic life of existing structures, beneficial in both maintaining neighborhood character and minimizing environmental impacts related to development. Use standards for single-family to multifamily conversions should require that the outward appearance of the structure be maintained in substantially the same manner and that parking be accommodated on-site.

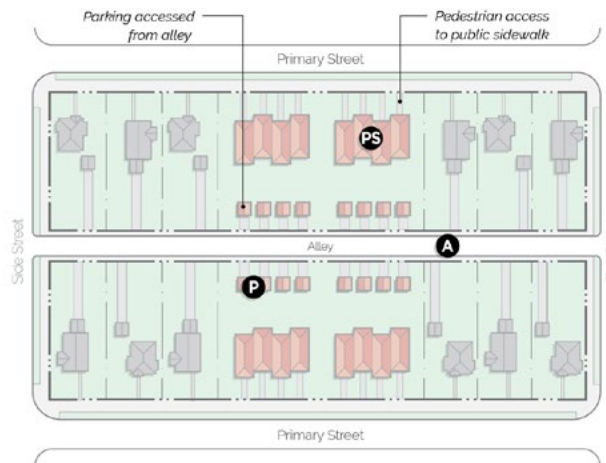
For Townhouse Cluster - End of Block



Figure 6. End of block versus mid-block townhouse parking standards (Prepared by Houseal Lavigne)

For Townhouse Cluster - Mid-Block

- Key**
- PS** Primary Structure
 - P** Parking Garage
 - A** Maintained or Reconfigured Alley



Design Standards

Objective design standards can help to provide fair certainty as to the appearance and function of new and infill development for both current residents and developers. Objective design standards can also streamline development approval since they can be reviewed for compliance by municipal staff rather than subjectively debated at discretionary review hearings.

For new neighborhoods, design standards do not need to reflect and be complementary with existing development. Therefore, a municipality should consider facilitating robust community outreach before standards are drafted to ensure they meet the preferences and expectations of the community. Communities

should consider focusing on three to five key design features that can provide streamlined, but not cookie-cutter development. Key design features could include roof type, building material mix, and porches and other entry features.

Design standards for infill development should reflect and be complementary with existing neighborhood development. However, in many infill development scenarios, there is not a consistent architectural style utilized throughout a neighborhood or even on the same block. In these circumstances a combination of objective and subjective design standards may be needed. Objective design standards, like those discussed for new development above, should regulate key design features

that are consistently seen throughout a neighborhood, such as dormers, wood siding, and front porches. Subjective design standards, such as requiring architectural features in keeping with existing neighborhood character, should allow for flexibility if the design of adjacent properties warrants such and should be an administrative approval.

Transition Standards

Ensuring an adequate transition between lower-density and higher-density housing is often the most important planning consideration when contemplating how to accommodate diverse housing within communities and neighborhoods.

When starting with a clean slate, mixed-density residential neighborhoods should integrate natural buffers, such as large stands of mature trees, creeks, and wetlands, into the site design to provide a visual and physical transition between higher- and lower-density uses as well as preserve valuable environmental features. To accomplish this, communities should consider adopting conservation design

standards that allow flexibility in bulk and dimensional standards in exchange for environmental feature preservation.

Transition standards for infill development should consider the relationship of new residences to surrounding development. For example, Morrisville, North Carolina, has transition standards that apply to buildings with a height that exceeds that of neighboring existing homes by one story or more ([§5.9.6.C.3](#)). Four transition techniques are established, and three are required to be met ([Figure 7](#)). The techniques include stepping down the structure height and mass along the shared property line; increasing the side yard setback a minimum of 10 feet beyond what is required; providing variations in side-building-wall and roof form; and utilizing dormers and sloping roofs to accommodate upper stories.

Public Involvement

Zoning ordinance reform to accommodate and encourage the development of missing-middle housing should include



Figure 7. An example of infill transition standards (Credit: Town of Morrisville, North Carolina)

- 1 Building height and mass “steps down” along shared property line
- 2 Larger side yard setbacks provide increased separation from existing home
- 3 Variations in side building wall and roof form break down visual mass of larger structure
- 4 Utilizing dormers and sloping roofs to accommodate upper stories

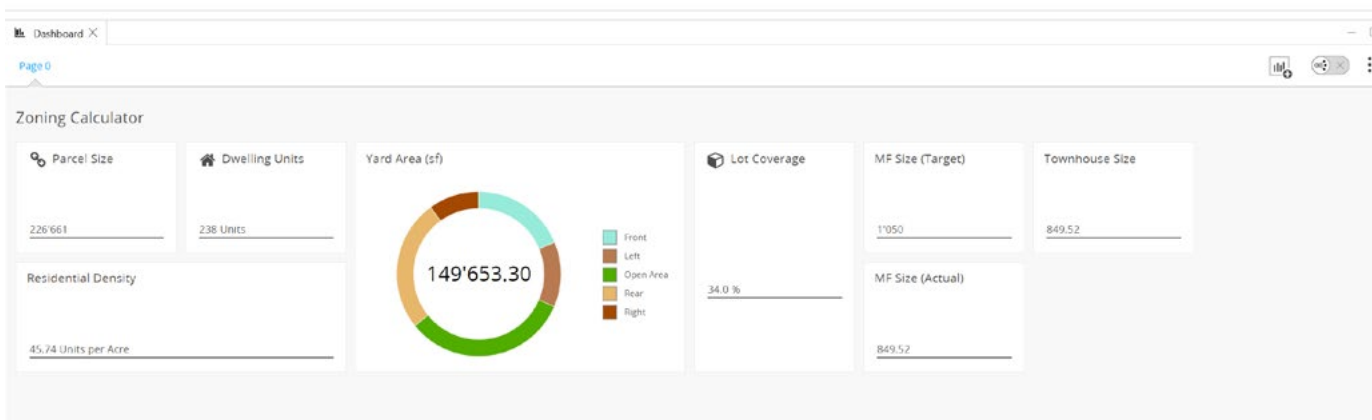
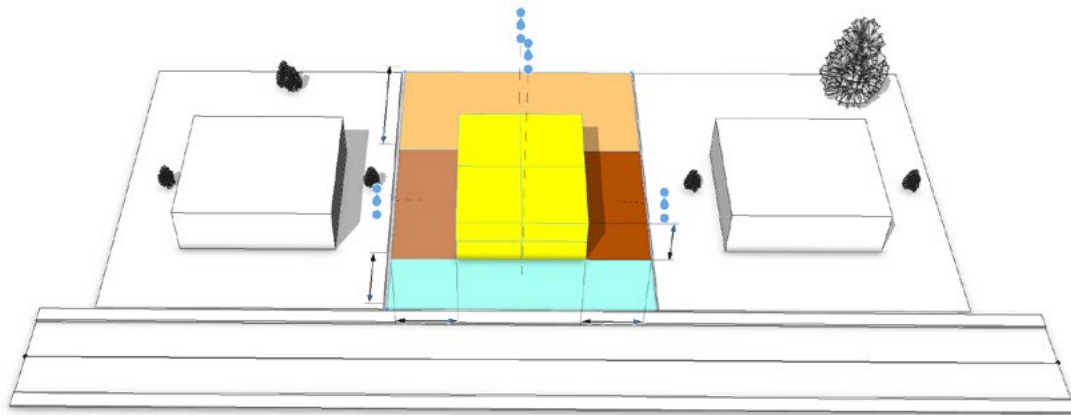


Figure 8. Procedurally modeled density calculator and dashboard (Prepared by Houseal Lavigne using ArcGIS Software)

robust public involvement. Time spent at the beginning of the reform process to build community consensus often pays dividends in project adoption and implementation. Changes in zoning that could impact the character of people's neighborhoods can be scary, and without adequate understanding as to the reasoning behind the changes and their potential impacts, residents push back, and reform fails.

Public involvement for zoning reform initiatives should focus on visualizing the potential impacts of proposed changes. Procedural modeling tools, such as ArcGIS CityEngine, can be used to test and compare building envelopes and built form for higher density infill housing in the context of existing single-family houses (Figure 8). This type of visualization can help residents understand that density can be on the inside of a building without showing evidence of such on the outside.

By utilizing procedural modeling, live testing at community meetings can allow consensus to be reached more easily.

Conclusion

To combat the housing availability and affordability crisis facing the nation, zoning reform will need to be considered by states, counties, and municipalities. Not all of the strategies presented in this article will be applicable in every community, as housing and development, resident sentiment, established neighborhood character, and so much more differ city to city. However, if the approach to zoning does not change, housing issues will likely not be addressed in a meaningful and impactful way. As a first step, jurisdictions should consider doing a chapter-by-chapter assessment of their zoning and subdivision ordinances to identify barriers

to housing development. Utilizing the results of the assessment, community conversations should then be conducted to gather feedback on the best ways to eliminate identified barriers and create new housing opportunities. Then, based on the feedback received, recommendations for ordinance amendments should be developed and presented to elected and appointed officials for consideration. Refined with elected and appointed official feedback, recommendations should be converted to text amendments, supported with graphics and illustrations, and brought through the adoption process. This process will help to ensure that amendments address the barriers to housing the community is facing and are vetted by residents and community leadership – ideally making the adoption process go more smoothly and the resulting ordinances more responsive to local needs.

About the Authors



Jackie Berg, AICP, is a Practice Lead with Houseal Lavigne. She is focused on working with municipalities to develop actionable plans and useful implementation tools that reflect the vision and goals of the community. 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.



John Houseal, FAICP, is a Partner and Founder of Houseal Lavigne and is regarded as one of the nation's top urban planning professionals with a reputation as a leader in urban planning, contemporary development practices, and community outreach. He has worked with hundreds of communities across the country and has received multiple national and state level awards for a variety of urban planning and design related projects.

Cover credit: Photo by Dan Bertolet,
[Sightline Institute: Missing Middle](#)
[Homes Photo Library, Flickr](#)



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