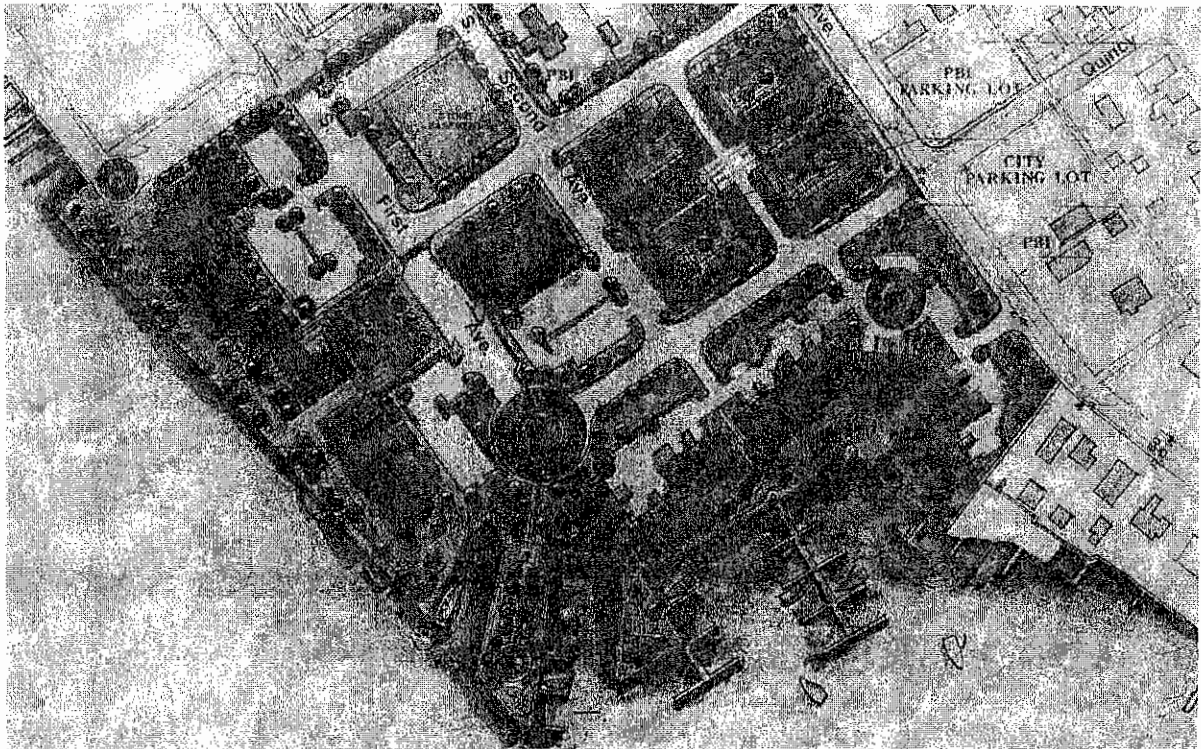


# Village of Shorewood, Wisconsin

## Master Plan for the Shorewood Business District

### PROFESSIONAL SERVICES AGREEMENT



THE LAKOTA GROUP  
S. B. FRIEDMAN & COMPANY

AUGUST 30, 2005

# Master Plan for Shorewood Business District Shorewood, Wisconsin

**Professional Services Agreement: August 30, 2005**

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## **Team Information**

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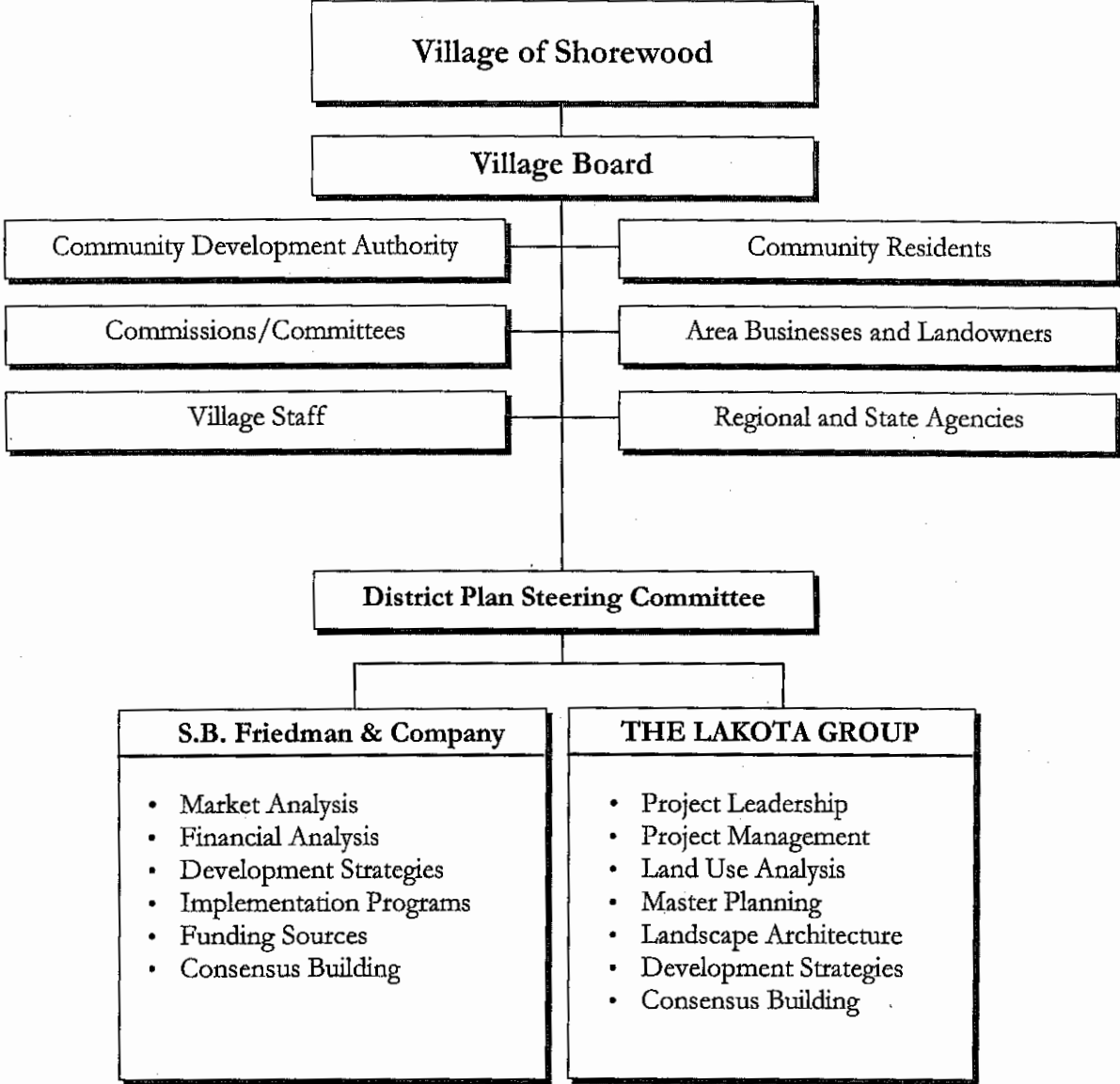
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# SECTION 1: TEAM ORGANIZATION



## **SECTION 2: PROJECT APPROACH**

### **PROJECT SCOPE**

The Village of Shorewood would like to prepare a Comprehensive Plan for the Shorewood Business District located around the intersection of Oakland Avenue and Capitol Drive.

This study provides the opportunity to:

- Craft viable economic development strategies based on sound market analysis.
- Identify retail and commercial redevelopment opportunities.
- Review and improve parking for employees, visitors, and customers.
- Improve pedestrian and vehicular access/circulation.
- Enhance the existing pedestrian environment.
- Evaluate and plan for the infrastructure needs of the area.
- Create a clear, documented vision for the district's future.
- Bring innovative, creative, and feasible ideas to the district.

The following is an overview of how the Lakota-Friedman team will organize and conduct the Shorewood Business District planning process. This scope will be refined and adjusted with further input and direction from the Village.

#### **Phase 1 –State of the District**

The first-phase inventory of existing conditions, and analysis of reports/studies, land use, historic, market and transportation data will evolve into a *State of the District* Summary Memo with supporting exhibits. This assessment will comprehensively address land use, physical conditions, pedestrian and vehicular access, circulation, parking, open space, infrastructure and streetscape issues, as well as real estate market potential and development opportunities.

The CDA District Plan Steering Committee, along with the Village Manager, will guide the process and provide the following information:

- *Background data and studies, including the Oakland Avenue Parking Study.*
- *Aerial photos and base maps.*
- *An inventory of existing land uses within the District.*
- *An inventory of existing businesses along each street segment of the District.*
- *An inventory of existing number of residential units by building and type (rental or condo/ duplex/ townhome/ single-family home) within the District.*
- *Recent goals/ objectives from Village-wide comprehensive planning process.*

Focus group discussions with the CDA Planning Committee and key District stakeholders and members of the Business Improvement District will be conducted as part of this phase. The focus groups will introduce the project and begin the community outreach process.

The first-phase assessment will be used to refine community-planning goals, determine issues and opportunities, identify opportunity sites, and begin to generate concepts, strategies, and solutions for District improvement, enhancement, and development. Also the first phase will take into account the existing TID, as well as an analysis of the existing duplex housing market.

### **Phase 2 – Community Visioning:**

During this phase, the Team will generate a range of ideas, concepts, and strategies for enhancing and developing the District, including parking locations. The concepts and preliminary information will be presented at a community workshop/design charette with key stakeholders, business/property owners, residents, Village staff, and CDA/Commission/Board members.

To go beyond basic land-use thinking and assist the Village in visualizing the development and design potential of the area, this phase will also include design studies and sketches of key opportunity sites. Lakota is widely known for its Min-Mid-Max approach to district and site planning that helps a community better visualize the physical scale, character, and context of potential development.

An extensive Power Point presentation will also be provided, including graphic and photo images of the District's land use mix, development context, and physical needs, as well as good examples of similarly scaled, successful developments from throughout the country.

The workshop could be broadcast on cable television and could include an interactive email "call in" component.

### **Phase 3: Business District Master Plan**

Based on the analysis and input from Phases 1 and 2, the Team will prepare a Business District Plan that addresses new development potential, land use, general building massing, parking layouts, access and circulation, pedestrian connections, and open space, as well as landscape/streetscape design concepts.

Goals, objectives, and policies that will be used to evaluate new development proposals will also be included. A preliminary draft of the Plan will be reviewed with staff, and then in a community workshop to gain additional input and refinement.

During this phase, the Team will prepare an implementation strategy that includes "catalytic" or priority projects. The Team will work closely with the Village to identify available resources and develop strategies for implementing the Plan.

Our project approach will comprehensively address the Shorewood Business District in its larger community context. We will balance technical data gathering with ongoing community participation. Effective communication between all parties will be essential in transmitting ideas and information so that recommendations reflect community goals and objectives.

## **SECTION 3: WORK PLAN**

### **PHASE 1: STATE OF THE DISTRICT**

#### **Task 1.1: Project Start/Committee Focus Group/District Tour (Meeting #1)**

Conduct project start and focus group meeting with Village Staff and CDA Committee to introduce the team and discuss:

- District Planning Mission.
- Initial Area Land-Use and Development Goals.
- Development Strengths/Weaknesses.
- Work Plan and Schedule.
- Available Data, Resources, and Resource People.

The Work Plan and Schedule will be refined based on input received during the Project Start Meeting. A more specific calendar of meeting dates and work products will be developed along with a list of data sources and key person interviews.

The same day as the project start/team building meeting, the team will conduct a tour of Shorewood's Business District with Village Staff and CDA Committee members. The Lakota team will record land-use, market, urban design, traffic, and infrastructure issues/constraints raised during the tour. Please note that this tour could include the Village Board, Plan Commission, Zoning Board, and residents and businesses/property owners.

The Village will be responsible for arranging the tour. The team will also conduct separate driving/walking tours as needed during the process.

#### **Task 1.2: Base Mapping**

Collect digital base maps, Comprehensive Plan maps, zoning maps, and aerial photos from the Village and County for use in analysis and planning activities. The maps will be refined as information becomes available during the process. If detailed sub-area base maps (with building structure footprints, curb cuts, sidewalks, and parking areas) are not available, the Lakota team will provide the Village with a fee estimate to prepare such maps.

#### **Task 1.3: Data Collection & Field Reconnaissance**

Conduct additional field investigations and data collection to generally observe/inventory:

- Land-use and development patterns.
- General building massing and physical conditions.
- General traffic flow and network.

- Streetscape and open spaces.
- Real estate market data.

**Task 1.4: Stakeholders/BID Focus Group (Meeting #2)**

Conduct a focus group meeting with District stakeholders and BID members to discuss issues/constraints/potential and initial planning goals.

The Village will be responsible for arranging the focus group location, notices, and accommodations.

**Task 1.5 Land-Use & Zoning Analyses**

Conduct a review of the Village's zoning ordinance and other related documents to gauge development possibilities under current regulations and identify zoning and signage issues that affect development within the District.

Prepare a land-use drawing that places the District within its larger regional context and highlights land-use, boundary, and jurisdictional relationships on a large scale.

Prepare a land-use drawing that summarizes District land-use context, physical conditions, vehicular access/circulation, streetscape, and open space.

Prepare a map that inventories recent/pending public and private improvements and developments that are planned, proposed or under construction in or near the District.

Analyze land-use data. Determine constraints and opportunities.

**Task 1.6: Market Analysis**

Assess market data and trends and complete market analyses for the following uses:

- Residential
- Retail

The residential portion of the analysis will focus on various housing types including condominiums, duplexes, and rental units. Information collected regarding the greater Shorewood area's housing market will be used to assess housing development potential in the Business District. The information can also be used by the Village to craft residential improvement strategies for the overall community.

The retail component will consider both retail and service uses.

Overall the market analysis will serve as the primary support for recommendations regarding the appropriate location and character of each land use recommended for the District. It will also provide absorption information to support phasing assumptions. The following key steps are contemplated as part of the Market Analysis:

**A. Assess Targeted Land Uses.**

Evaluate overall appropriateness and marketability of the District, as well as key sites within it, for a range of residential and commercial uses. This review will allow for better definition of the range of uses to be analyzed in detail, as well as the potential scale and character of these uses.

**B. Research Demographic/Economic Trends.**

Evaluate key demographic factors affecting the District and broader region through analysis of population projections, employment and income growth, and recent/projected trends in Shorewood and its surrounding communities. This review is anticipated to include data from such sources as the Shorewood's Comprehensive Plan, SEWRPC, and the state's Department of Administration (DOA) population projections, forecasts from national sources such as Woods & Poole.

Land-use specific data such as housing distribution, building permit data, and consumer expenditures will also be researched.

These analyses will focus on such factors as:

- Projected regional growth for which Shorewood can compete.
- Key characteristics, such as age and income, of growing household segments.
- Historical development trends.
- Growing industry types and sectors.
- Retail spending levels/growth.

**C. Conduct Competitive Market Review.**

Conduct field research, review published sources, and conduct interviews with brokers/key informants to obtain information on active developments within the market area. Through this exercise, gain a better understanding of the strengths, weaknesses, and character of existing land uses within each land-use category. Identify newly constructed and planned developments and track data, where available, on occupancy levels, rent/sales pricing, and absorption. Other relevant market data, including development amenities, location, and access will also be factored into the analysis. A map will be created displaying the local competitive inventory and will highlight the competitive advantages and disadvantages of the District.

**D. Estimate Market Potential.**

Based on demographic projections, competitive inventory, industry trends, and other market data, prepare recommendations regarding the type and character of future development to be incorporated into the land-use and development concepts for the District. These estimates will be based on factors including the following:

**Residential**

- Current and projected demographic trends, including population and income.
- Mobility and moving trends.



- Vacancy rates by housing type.
- Home purchasing trends.
- Existing and planned competitive supply in the market area.
- Typical absorption rates of area projects.
- Current price points and rental rates.

#### **Retail**

- Current and projected consumer expenditures.
- Competitive retail inventory.
- Observed gaps in current retail offerings.

#### **Task 1.7: Transportation Analysis**

Identify constraints and opportunities regarding business district access, circulation, and parking. Identify opportunities for consolidating/creating curb cuts and shared parking sites. Also analyze pedestrian and bicycle connections/facilities. This analysis will include an inventory of existing off-street and on-street parking spaces, along with an assessment of District parking needs based on existing land uses and modern parking ratios for such uses.

Projections of parking needed to accommodate potential new development will be prepared during the Community Visioning and Master Plan phases.

#### **Task 1.8: State of the District Summary Memo**

Prepare a memo that incorporates input from the focus groups and Lakota team analyses and summarizes demographics, planning issues, real estate market, land-use mix, and transportation issues and development opportunities.

#### **Task 1.9: Committee Review (Meeting #3)**

Conduct a meeting with the CDA Committee to review the study findings, check planning assumptions, and sharpen land-use and development goals.

## **PHASE 2: COMMUNITY VISIONING**

#### **Task 2.1: Land-Use Strategies/Development Concepts/Design Sketches**

Prepare a range of concepts for the Business District. Conceptual plan drawings and design sketches will be prepared that address:

- *Land-Use Mix*
- *Development Density*
- *General Road/Street Network*
- *General Building and Parking Massing/Location, with concepts for shared parking.*
- *Open Space and Green Linkages*
- *Gateways/Entrances*
- *Community Identity/Signage*
- *District Design Character*

Development concepts will be prepared for each site identified as being a development opportunity. Design sketches will address:

- *Five facades to highlight how existing buildings could be enhanced.*
- *A perspective view of a potential development corner.*
- *General streetscape character to highlight how blocks could be enhanced (two sample blocks, with overall streetscape shown in Final District Plan, will not represent detailed design drawings)*

**Task 2.2: Community Workshop/Design Charrette (Meeting #4)**

Conduct a workshop with the CDA, Plan Commission, Village leaders, residents, and business/property owners to review the strategies, concepts, and sketches.

Evaluate the options according to their short-term and long-range potential for accomplishing community goals and objectives. Refine the information and options, generate additional planning and design ideas, and prioritize an overall land-use and development direction for the District.

This task includes workshop preparation such as organizing a PowerPoint presentation and color rendering the concepts.

The Village will be responsible for arranging the workshop location, notices, and accommodations.

## **PHASE 3: BUSINESS DISTRICT MASTER PLAN**

**Task 3.1: Preliminary Plan**

Based on the Phase 2 input, prepare a Preliminary Master Plan for the District.

**Task 3.2: Committee Review (Meeting #5)**

Review the Preliminary Plan with the CDA Committee.

**Task 3.3: Community Workshop (Meeting #6)**

Conduct a workshop with the Plan Commission, Village leaders, residents, and business/property owners to review the Preliminary Plan.

**Task 3.4: Draft Report (with Implementation Strategies)**

Create a draft report summarizing the land-use direction, density, and physical character of the District plan, general design guidelines, and potential implementation strategy/steps.

**Task 3.5 Joint Commission/Board Workshop (Meeting #7)**

Review the Plan and Report at a joint Plan Commission/Village Board workshop meeting. The documents will be circulated to appointed and elected officials prior to the workshop.

**Task 3.6: Final Plan/Report**

Prepare the final Business District Master Plan and Report.

## **SECTION 4: PROJECT PRODUCTS**

### **Phase 1: State of the District**

#### **Written**

- State of the District Summary Memo

#### **Drawings**

- Regional/Area Context Maps
- Area Land-Use Constraints/Opportunities Map
- Competitive Market Context Map

#### **Meetings**

1. Project Start/Committee Focus Group/Site Tour
2. Stakeholders/BID Focus Group
3. Committee Review

### **Phase 2: Community Visioning**

#### **Drawings**

- Land-Use & Development Concepts
- Design Sketches

#### **Meetings**

4. Community Workshop/Design Charrette

### **Phase 3: Business District Master Plan**

#### **Written**

- Draft Report
- Final Report, with implementation strategy/steps

#### **Drawings**

- Preliminary Master Plan
- Final Plan

#### **Meetings**

5. Committee Review
6. Community Workshop
7. Plan Commission/Village Board Joint Workshop

This agreement does not include:

- ☐ *Code changes (Lakota can provide as a later phase)*
- ☐ *Detailed development guidelines or detailed site plans (Lakota can provide as a later phase).*
- ☐ *Streetscape/signage construction documents/specifications (Lakota can provide as later phase).*
- ☐ *Building construction documents/specifications (By architects as a later phase).*
- ☐ *Civil, traffic, utility, soils or environmental studies/engineering (By engineers).*
- ☐ *Developer recruitment, financial feasibility, fiscal impact studies (By SB Friedman as later phase).*
- ☐ *District marketing/promotion programs (by Lakota or SBFCCO as later phase)*
- ☐ *Property or legal surveys (By surveyors).*

## **SECTION 5: PROJECT SCHEDULE**

It is anticipated that the project will be completed over a six- to eight-month time frame based on the availability of data and scheduling of meetings. The actual time frame for completion of each task will be reviewed with the Village prior to commencement.

The Lakota team will work closely with Village Staff to refine the schedule, ensure deadlines are met, and manage the project. Lakota and its team members have the staff, resources, experiences and expertise to conduct an assignment of this scope and to begin work in September 2005.

## **SECTION 6: PROJECT TERMS**

The Lakota team will work closely with the Village's staff and leadership to refine the project scope and manage the project.

### **PROFESSIONAL FEES/EXPENSES**

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The team's professional fees and reimbursable expenses are estimated as follows:

<b>Lakota</b>	<b>\$48,235</b>
<b>S.B. Friedman</b>	<b>\$37,675</b>
Total Fee Estimate	\$85,910
Expenses (10% of fee)	\$8,591
<u>Contingency (Meetings/Tasks)</u>	<u>\$10,000</u>
<b>Total Project Budget</b>	<b>\$104,501</b>

The above fee estimate can be adjusted based on clarifications or changes to the work scope made by the Village. The fee estimate includes all the meetings outlined in the Work Plan. It does not include any additional meetings, project reviews, presentations, studies, plans, or designs other than those outlined above.

A contingency fee amount of \$8,000 is included in the budget for additional meetings or services that may be requested by the Village. For example, SB Friedman will be reviewing the Village's TIF program/budget in regards to implementation of the new District Plan. More detailed review may be needed to determine TIF potential based on the Plan and the contingency amount would be applied toward such work.

Lakota and Friedman will provide a fee estimate for additional requested tasks for Village budgeting for the contingency amount or for future consulting services.

Any additional services requested of the Lakota team will be billed on an hourly rate basis according to each firm's current hourly rates.

**Lakota Hourly Billing Rates (2005):**

• Principal	\$195
• Project Manager	\$145
• Senior Planner/Urban Designer/Landscape Architect	\$120
• Planner/Urban Designer/Landscape Architect	\$110
• Research/Drafting Staff	\$75
• Administrative/Operations Staff	\$65

**S.B. Friedman & Company Hourly Billing Rates (2005):**

• President	\$265
• Director of Consulting Services	\$200
• Senior Project Manager	\$185
• Associate Project Manager	\$130
• Associate	\$100

Also, refer to the enclosed chart regarding team tasks and fees. S.B. Friedman will be a sub-consultant to Lakota.

**Reimbursable Expenses:**

- Travel (mileage/tolls/parking/cabs/airfare/out-of-region meals & lodging)
- Delivery (faxes/postage/messenger/express)
- Photography (film/processing)
- Copying/Reproduction
- Computer Plots
- Long Distance Communication
- Renderings/Models (if requested by client)
- Special Supplies (if extra markers/graphic tape/pantone needed)
- Miscellaneous (municipal documents, special reports, data)

Professional fees and expenses will be billed monthly for work completed. Unpaid invoices will bear 1.5% interest per month past 30 days. Either party may terminate this agreement 15 days after written notice. Lakota shall be compensated for all services performed up to this date.

Please indicate acceptance of this agreement by signing one copy and returning it to our office. Lakota will begin work after receiving written authorization to proceed via fax, mail, or messenger.

*The Lakota Group and S.B. Friedman & Company appreciate the opportunity to provide the Village of Shorewood with Professional Planning and Design Services.*

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**John LaMotte, AICP**  
Principal  
The Lakota Group

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Signature

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Printed Name

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Title

**Village of Shorewood**

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Date

Village of Shorewood Shorewood, Wisconsin Shorewood Business District Master Plan August 30, 2005	LAKOTA			S.B. Friedman & Company		
	Staff Hours	Staff Hours	Staff Hours	Staff Hours	Staff Hours	Staff Hours
<b>PHASE 1: State of the District</b>						
1.1 Project Start/Committee Focus Group/Tour (Meeting #1)	8	8	8	8	8	8
1.2 Base Mapping		4	4			
1.3 Data Collection & Field Reconnaissance	4	8	16	4	4	12
1.4 Stakeholders/BID Focus Group (Meeting #2)	5	5		5	5	
1.5 Land-Use/Zoning Analyses	4	8	12			
1.6 Market Analysis (including key person interviews)	2	2				
Demographic Data Research					6	30
Competitive Market Inventory					6	30
Market Support/Capture Analysis					8	30
Potential Development Program					6	30
1.7 Transportation Analysis	1	2	2			
1.8 State of the District Summary Memo	2	4	8	4	4	8
1.9 Committee Review (Meeting #3)	4	4		4	4	4
<b>Subtotal Hours</b>	<b>30</b>	<b>45</b>	<b>0</b>	<b>0</b>	<b>51</b>	<b>0</b>
<b>PHASE 2: Community Visioning</b>						
2.1 Land-Use Strategies/Development Concepts/Design Sketches	6	24	40		2	2
2.2 Community Workshop/Design Charrette (Meeting #4)	6	6	6	6	6	6
<b>Subtotal Hours</b>	<b>12</b>	<b>30</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>0</b>
<b>PHASE 3: Business District Master Plan</b>						
3.1 Preliminary Plan	4	12	16		2	2
3.2 Committee Review (Meeting #5)	4	4			4	
3.3 Community Workshop (Meeting #6)	6	6	6	6	6	6
3.4 Draft Report (with Implementation Strategies)	4	16	36		6	16
3.5 Joint Commission/Board Workshop (Meeting #7)	4	4			4	
3.6 Final Plan/Report	2	4	8		4	10
<b>Subtotal Hours</b>	<b>24</b>	<b>46</b>	<b>0</b>	<b>0</b>	<b>26</b>	<b>0</b>
<b>Total Hours by Staff</b>	<b>66</b>	<b>121</b>	<b>0</b>	<b>162</b>	<b>0</b>	<b>194</b>
<b>Subtotal Fee by Staff</b>	<b>\$12,870</b>	<b>\$17,545</b>	<b>\$0</b>	<b>\$17,820</b>	<b>\$0</b>	<b>\$18,275</b>
<b>Total Fee by Firm</b>		<b>\$48,235</b>			<b>\$37,675</b>	
<b>Staff Categories</b>	<b>Staff Categories</b>			<b>Staff Categories</b>		
A. Principal	\$195			A. President	\$265	
B. Project Manager	\$145			B. Director of Consulting	\$215	
C. Senior Planner/Designer	\$120			C. Associate Project Manager	\$130	
D. Planner/Designer	\$110			D. Associate	\$100	
Project Fee Total = \$85,910						
Expense Estimate (10% of Fee) = \$8,591						
Contingency (Misc Meetings/Tasks) = \$10,000						
<b>Total Project Budget = \$104,501</b>						

# MEMORANDUM

September 1, 2005



TO: Village Board  
FROM: Chris Swartz, Village Manager  
COPY:  
RE: Comprehensive Business District Plan Study Agreement

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The following changes will be made to the attached agreement with The Lakota Group:

Page 2, under contents Section 1: add "Project" before "Team"

Page 3, Pete will send you a revised copy for insertion

Page 4, under project scope, add "In addition this study will address issues and opportunities outside the business district related to duplex and multi-family housing. (Also add a bullet point down below in this regard.)"

Page 5, Its paragraph should read "Focus.....with the CDA, Steering Committee, members of the appropriate Village Committees, and Key..."

Page 5, Phase 2, Community Visioning, its paragraph should end with "Charette with those listed in the organizational chart"

Page 5, Phase, Business District Plan. 1st Paragraph last sentence, after pedestrian connections, add "general design concepts for use as the foundation for detailed design guidelines and zoning ordinances"

Page 6, Phase 1, Task 1.1, should read "conduct.....Staff, CDA, and Steering Committee to..."

Page 7, Task 1.4, should read "Stakeholders/Business/Real Estate (eliminate and bid members)"

Page 8, Under "Residential", be more specific about deliverables as to outside the district. Very important that we separate out. Maybe a separate section about residential outside district.

Page 9, Task 1.9, should read with the CDA and/or steering committee members.

Page 10, "Design sketches will address." Two blocks out of a four block area?? Maybe reduce block size and do a sample in all four. Let's talk.

Page 10, Task 2.2 (Meeting #4, exchange the list to "those identified in the organizational chart"

Page 10, Task 3.2 (Meeting #5) use "CDA/Steering Committee"

Page 10, Task 3.3, rather than the list, use "all identified in the organizational chart"



Page 10, Task 3.5 (meeting 7 replace with "a workshop meeting with appropriate village governing bodies, including village board"

Page 11, Meeting 7 (consistent with previous changes)

Page 12, Pete will rewrite and send it to you

Overall need to define residential product related to outside district. Need to discuss Board presentation.