



NEENAH PLAN COMMISSION

Tuesday, June 25, 2024

4:00 P.M.

Hauser Room, City Administration Building

Virtual Meeting Option: This meeting is available virtually. To access the virtual meeting (Requires Microsoft Teams), please click on the link below:

[Join the meeting now](#)

Meeting ID: 237 197 902 605

Passcode: rbyMH7

1. Approval of Minutes: **May 7, 2024**
2. Public Appearances (Ten minutes divided among those wishing to speak on topics pertinent to the Plan Commission)
3. Public Hearings:
 - a. Tax Increment District #13 - Creation
4. Action Items:
 - a. Project Plan Approval (Amendment to PPA #1-22) - Bridgewood Luxury Apartments
 - b. Tax Increment District #13 - Review of Proposed Boundaries and Project Plan
5. Discussion Items:
 - a. Housing Study and Needs Assessment
 - b. Design Standards
 - c. Downtown Sidewalk Amenities
6. Announcements and future agenda items:
 - a. Next Meeting: July 9, 2024

In accordance with the requirements of Title II of the Americans with Disabilities Act (ADA), the City of Neenah will not discriminate against qualified individuals with disabilities on the basis of disability in its services, programs, or activities. If you need assistance, or reasonable accommodation in participating in this meeting or event due to a disability as defined under the ADA, please call the Community Development Department Administrative Assistant at 920-886-6125 or the City's ADA Coordinator at (920) 886-6106 or e-mail attorney@NeenahWI.gov at least 48 hours prior to the scheduled meeting or event to request an accommodation.

MINUTES OF THE NEENAH PLAN COMMISSION
Tuesday, May 7, 2024
4:00 p.m.

Present:

Mayor Jane Lang, Chairperson	PRESENT	Sarah Moore-Nokes, Vice Chairperson	PRESENT	Gerry Kaiser, Director of Public Works	PRESENT
Kate Hancock-Cooke	PRESENT	Karen Genett	PRESENT	Betsy Ellenberger	PRESENT
Gerry Andrews	PRESENT	Alderman Dan Steiner	PRESENT		

Also Present:

Brad Schmidt, Deputy Director of Community Development	Kayla Kubat, Administrative Assistant of Community Development	Chris Haese, Director of Community Development
Frank Cuthbert, 1533 Fallow Dr Neenah WI		

Minutes: MSC Kaiser/Moore-Nokes, the Plan Commission, to approve the April 23, 2024 meeting minutes. All voting aye. Motion passed. Members Ellenberger, Genett, and Hancock-Cooke abstained.

Public Appearances: Chairperson Mayor Lang opened public appearances to topics not related to the agenda.

No one in attendance spoke. Chairperson Mayor Lang closed public appearances.

Public Hearings: None

Action Items:

a. Site Plan Review (Sidewalk Café) – 218 W. Wisconsin Avenue – Layla’s Place

Deputy Director Schmidt went over the request for a sidewalk café for Layla’s Place, located at 218 W Wisconsin Avenue. The site plan submitted shows the sidewalk café extending past the building footprint, however, to meet the criteria of a sidewalk café, it cannot extend past the building footprint. Also, there cannot be any tables or chairs within two feet of the water valve that is located near the proposed sidewalk café. The sidewalk café is also requesting an extension of their liquor license, which will be reviewed by the Public Services and Safety committee. The proposal is for three tables with two chairs each.

MSC Ellenberger/Hancock-Cooke, the Plan Commission, to approve the Site Plan for the Sidewalk Generation Paulson, Inc., 218 W Wisconsin Avenue subject to the conditions of the site plan review letter. All voting aye. Motion passed.

b. Certified Survey Map #4-24 – 1712 Dixie Road – 4 Lots

Deputy Director Schmidt went over that along with the recent site plan approval for RGL Logistics, there is also realigning and creating new parcels on the 65 acre entire site. 1712 Dixie Road is on the north half of the site. The proposal is to create two lots and two outlots, which is about 30 acres. Lot 1 is part of the land that will be RGL Logistics and Lot 2 will be another development site. Outlots are non-buildable sites or remnant pieces that do not meet the design

REPORT

CONSENT AGENDA

requirements of a typical lot at this point. Outlot 1 includes a radio tower and wetland and Outlot 2 includes the city stormwater facilities. This CSM will also officially dedicate the Dixie Road right-of-way. There is an additional easement between Lot 1 and Lot 2.

Member Steiner asked if the outlots are still owned by the city. Deputy Director Schmidt stated yes, they are still owned by the city.

Member Hancock-Cooke asked for clarification on what a dedicated right-of-way means. Deputy Director Schmidt stated even though there is a road there, dedicating a right-of-way means it becomes public right-of-way. The city is accepting that as where a street will go.

Member Hancock-Cooke asked about outlot 1 and if the city owns a lot of this kind of property where it is non-buildable. Deputy Director Schmidt stated the city does not own a lot of these types of lots. With the outlots, it is more a remnant piece of land that does not have access to it at this point but in the future, it could become part of a different lot if further development happens.

Director Kaiser asked if the tower owner is responsible for maintaining around the tower. Deputy Director Schmidt stated yes, the owner would be responsible for the 5 acres of maintenance as there is an easement between Lot 1 and Lot 2.

MSC Genett/Ellenberger, the Plan Commission, to recommend Common Council approve the 4 lot CSM for the property located at 1712 Dixie Road. All voting aye. Motion passed.

c. Certified Survey Map #5-24 – 1750 Dixie Road – 2 Lots

Deputy Director Schmidt went over the CSM regarding the southern portion of this site. There will be a creation of one lot where the 1st phase of RGL Logistics warehouse will be built and one outlot with no street access at this time.

MSC Moore-Nokes/Ellenberger, the Plan Commission, to approve the 2 lot CSM for the property located at 1750 Dixie Road. All voting aye. Motion passed.

d. Final Plat #1-24 – 3rd Addition to the Homes at Freedom Meadows

Deputy Director Schmidt went over the final plat to the 3rd addition to the Homes at Freedom Meadows. The preliminary plat was reviewed, and any recommendations or comments made during that time have now been revised and updated on this final plat.

Member Steiner asked how many total homes are being built between all the phases. Deputy Director Schmidt stated about 250 homes between all phases.

MSC Kaiser/Ellenberger, the Plan Commission, to recommend Common Council approve the Final Plat for the Third Addition to the Homes at Freedom Meadows subdivision. All voting aye. Motion passed.

Deputy Director Schmidt went over the definition of design standards and having some control over the site design with specific requirements in our code. Many codes are either city-wide or district specific. Our current zoning code has some site design requirements with landscaping, fencing, etc., however, nothing very specific with architectural requirements. He went over the goals of site and building standards such as ensuring high-quality development, enhancing commercial corridors, protecting historic areas, and promoting walkability. Some examples of potential requirements include screening of roof-top mechanical equipment, building height compatible with surrounding buildings, limiting drive-thru locations, and prohibiting blank walls on buildings and requiring more window openings. The next steps would be to review codes of surrounding municipalities and explore community-wide and district design standard options.

Member Ellenberger asked how we could do a city-wide with such different areas of the city to keep in mind, like the downtown versus the Commercial Street corridor. Deputy Director Schmidt stated the city-wide is general enough where the standards apply to all, and the district wide is more detailed in terms of what type of development can happen and how it can happen.

Announcements and Future Agenda Items: Next meeting is scheduled for May 28, 2024.

Adjournment: The Commission adjourned its meeting at 4:35 p.m. MSC Genett/Ellenberger. All voting Aye. Motion passed.

Respectfully Submitted,



Kayla Kubat
Administrative Assistant, Department of Community Development



M E M O R A N D U M

DATE: June 25, 2024
TO: Mayor Lang and Members of Plan Commission
FROM: Brad R. Schmidt, AICP, Community Development Department
RE: Bridgewood Planned Development District - Project Plan Approval #1-22
Amendment – Bridgewood Luxury Apartments (Ordinance No. 2024-11)

Request

The Community Development Department has received a request from Versatile Management (property owner) to amend the project plan for the Bridgewood Luxury Apartments.

Consideration

The Bridgewood Planned Development District (PDD) Master Plan was amended in May 2022. In September 2022, a project plan was approved for the development of the Bridgewood Luxury Apartments. The project includes 26 multi-family structures each with eight (8) dwelling units per building for a total of 208 dwelling units. In addition, the development includes an office building. Construction has begun on three of the residential buildings.

The developer is proposing to re-orient the office building, including the parking lot, and add a swimming pool which would be available to residents and their guests.

Master Plan Conformance

The Bridgewood Planned Development District (PDD) Master Plan was amended in May 2022, to reclassify the use of the former golf course as multi-family residential.

A Planned Development District is a zoning district which encourages the efficient and optimal utilization of land. Traditional zoning tends to be inflexible and uniform. When a PDD is approved, the accompanying Master Plan highlights the PDD's standards and land uses. The implementation of the PDD's Master Plan typically occurs over a predetermined time frame and occurs in phases. Each phase of the Master Plan is reviewed as a Project Plan Approval. The Project Plan Approval is essentially a site plan review which includes a review by the City's Plan Commission and Common Council. The City's Zoning Code further lists the purpose of PDD's:

- Assure that growth is planned and accomplished within the City's goals both for the surrounding neighborhood and the community as a whole.
- Promote flexibility in design and the efficient use of land to facilitate a more economic arrangement of buildings, uses, circulation systems and utilities.
- Provide for the accomplishment of external architectural unity so as to promote design harmony.
- Preserve to the greatest extent possible, existing landscape features and natural amenities, and utilize such features in an effective manner.

- Enhance the natural setting through the placement of manmade facilities and plant materials.
- Provide more useable and suitably located common and open space areas than would otherwise be provided under conventional land development procedures.

Office Building Modification

The developer is proposing to re-orient the office building and construct an outdoor swimming pool. In addition, the off-street parking lot will increase the number of stalls from 13 to 24. The new building alignment continues to meet the minimum setback requirements from the north property line. The decking around the proposed pool maintains a 25-foot setback from the north property line. A sight-tight fence is proposed along the shared property line north of the pool decking and the residences north of the office building. A fence is also proposed around the pool as a safety measure.

The proposed amendment to the project plan is consistent with the Bridgewood Planned Development District Master Plan.

Recommendation

Appropriate action at this time is to recommend Council approve Ordinance #2024-11, for the amendment to Project Plan Approval #1-22 for the Bridgewood Planned Development District, allowing the modification to the office building layout and the addition of an outdoor swimming pool subject to the Project Plan Approval Letter.



City of Neenah Community Development
211 Walnut Street
Neenah WI 54956
Ph 920.886.6130

June 21, 2024

TOM VANDEYACHT
VERSATILE MANAGEMENT, INC
2220 N LYNNDAL DR
APPLETON, WI 54914

**RE: PPA #1-24 (Amendment to PPA #1-22) - 1020 Cameron Way - Bridgeview Luxury Apartments Project Plan
Review () Status Approved**

Dear TOM VANDEYACHT:

We have completed our review of the plan identified above. The plan was approved per attached comments, if any. This letter is not to be construed as a zoning compliance, grading, building permit, certificate of occupancy, or a substitute for any permit or certificate required by any state or federal government entity.

Sincerely,

Brad Schmidt
Deputy Director of Community Development and Assessment
bschmidt@neenahwi.gov
920-886-6126

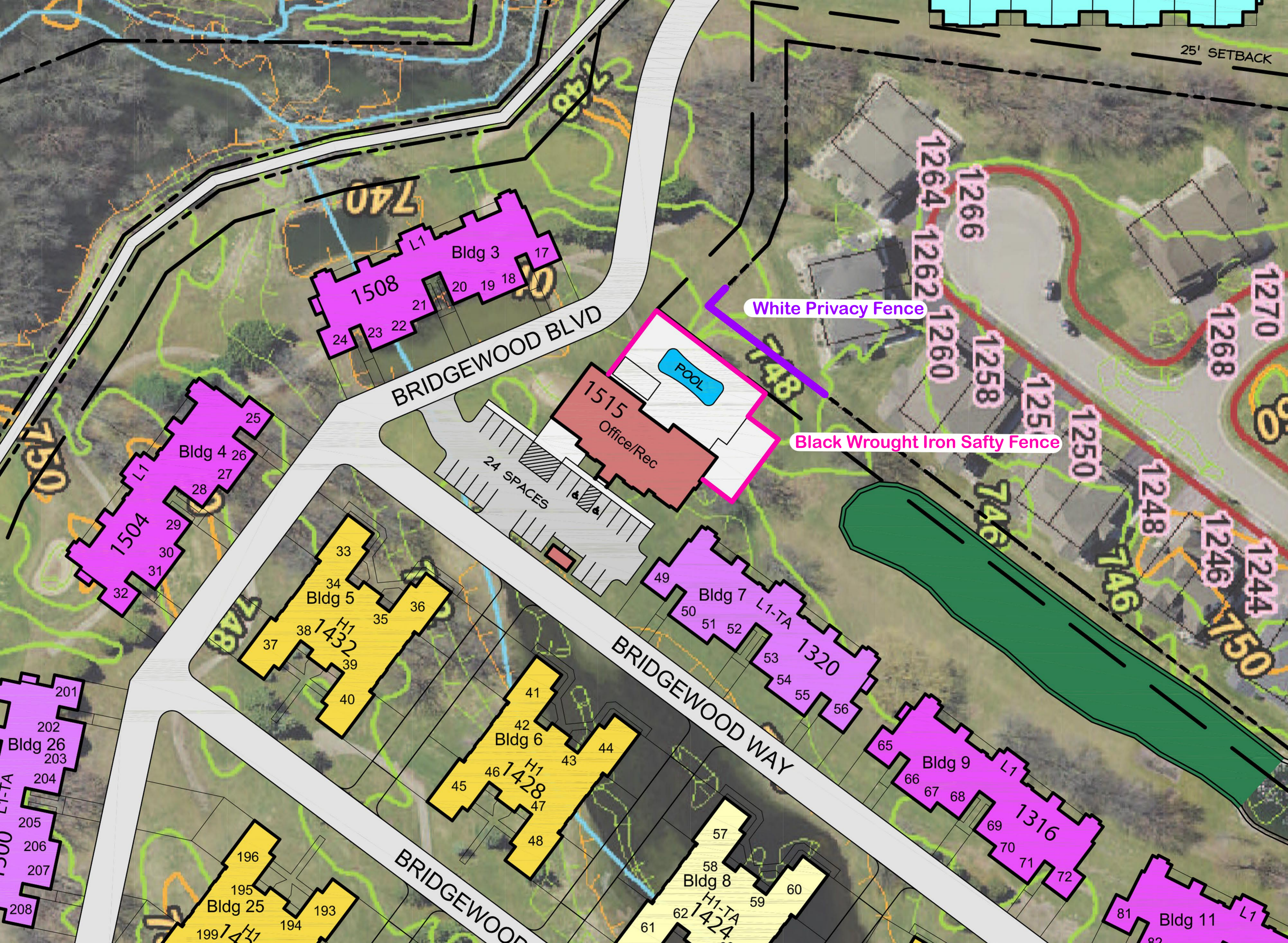
Plan Review Comments

Planning - Brad Schmidt -
bschmidt@neenahwi.gov

Approved

Review Comments:

1. Prior to installation of a fence, please submit a permit application online at <https://evolvepublic.neenahwi.gov/>.
-



25' SETBACK

BRIDGEWOOD BLVD

BRIDGEWOOD WAY

White Privacy Fence

Black Wrought Iron Safty Fence

POOL

24 SPACES

1515
Office/Rec

Bldg 3
1508
L1
17-24

Bldg 4
1504
L1
25-32

Bldg 5
1432
H1
33-40

Bldg 6
1428
H1
41-48

Bldg 7
1320
L1-TA
49-56

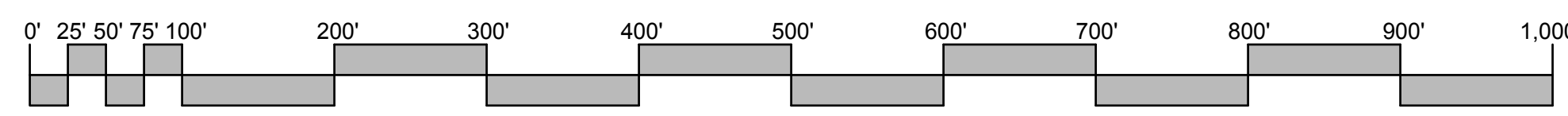
Bldg 9
1316
L1
65-72

Bldg 25
1437
193-199

Bldg 8
1424
H1-TA
57-62

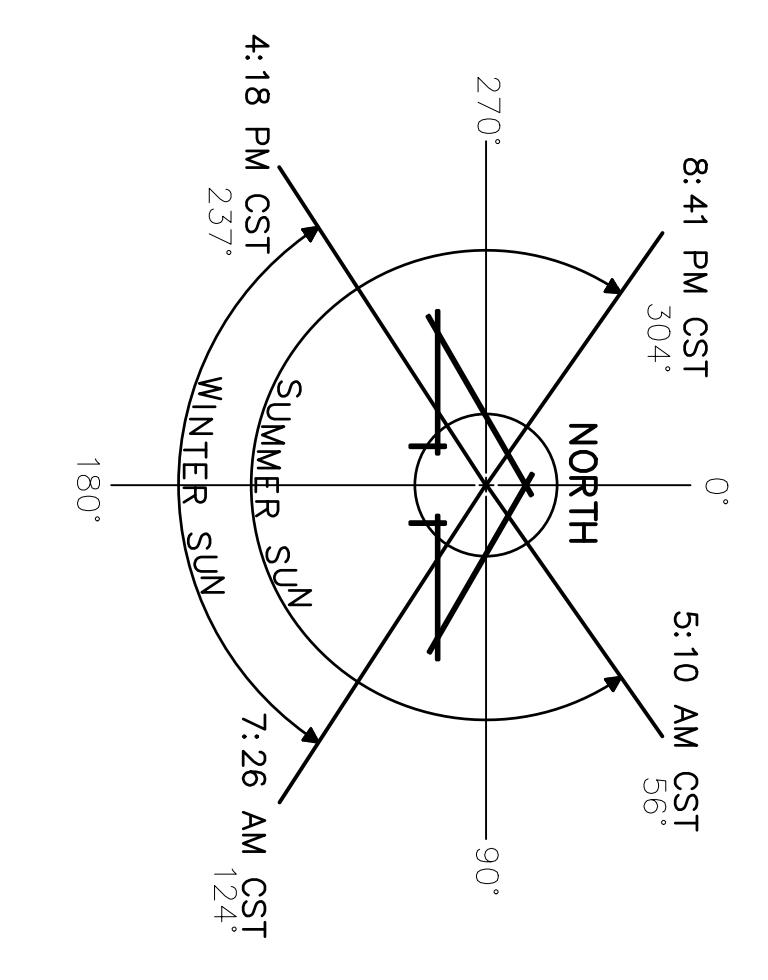
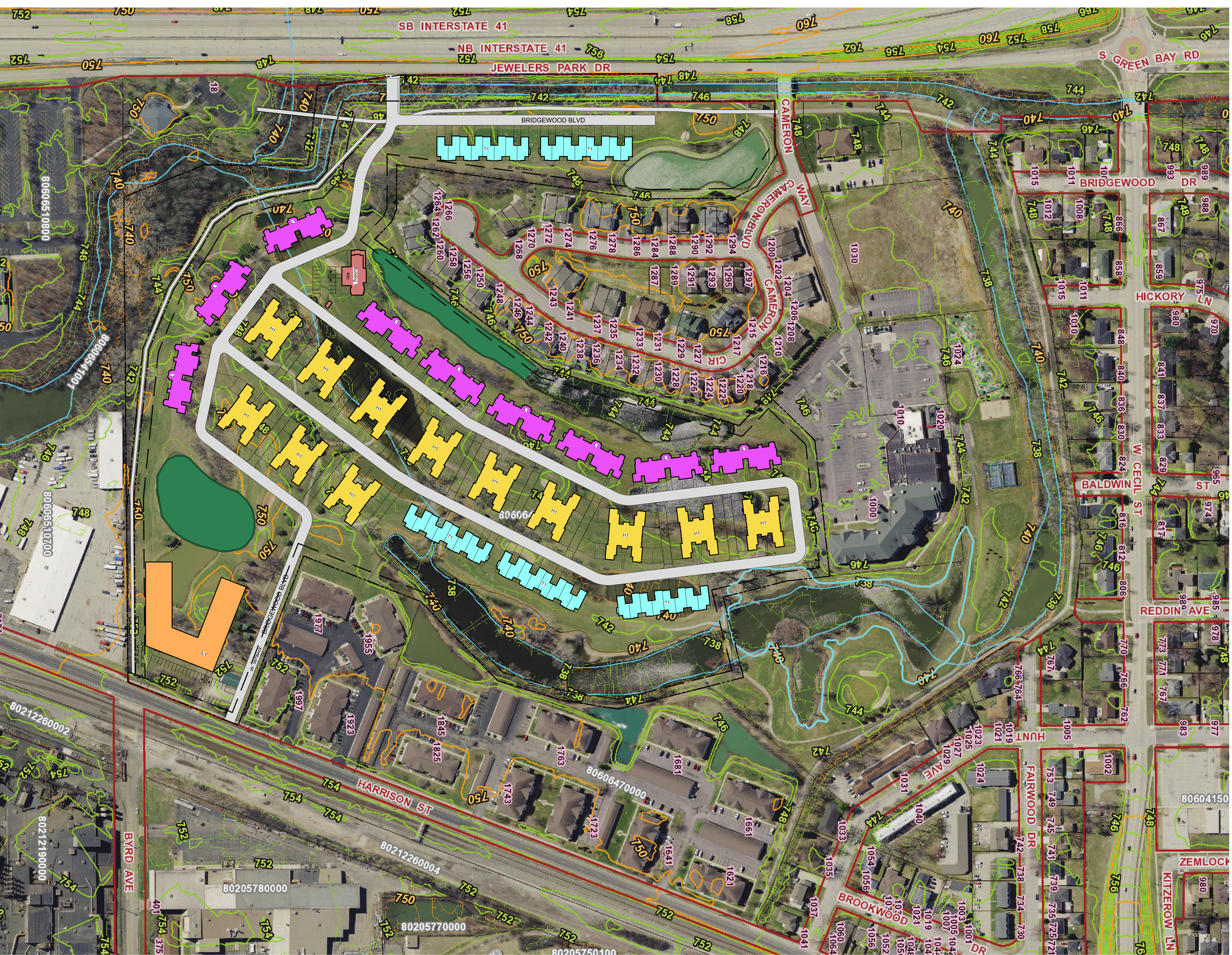
Bldg 11
L1
81-82

Bldg 26
201-208
AT-17 0001



CONCEPTUAL SITE PLAN

SCALE: 1" = 100'-0"
THE LOT BEARINGS SHOWN ON THIS PLAN ARE INTERPRETED VALUES.



NOTE:
CONTOURS
SHOWN ARE
EXISTING

BUILDING / SITE CONTENT

CURRENT LAND USE: PDD (CITY OF NEENAH)
FUTURE LAND USE: REGIONAL COMMERCIAL (CITY OF NEENAH)
PROPOSED LAND USE: MULTIFAMILY RESIDENCE (CITY OF NEENAH)

PARCEL ID: 80606480000
EXISTING ACREAGE: 61.28 ACRES (2,669,339 SF)
PROPOSED ACREAGE: 46.74 ACRES (2,035,896 SF)

BUILDING DATA
H1 BUILDING FOOTPRINT: 9,425 SF* (x12) = 113,100 SF
L1 BUILDING FOOTPRINT: 9,819 SF* (x9) = 88,362 SF
T1 BUILDING FOOTPRINT: 12,832 SF* (x5) = 64,160 SF
U1 BUILDING FOOTPRINT: 37,255 SF* (x1) = 37,255 SF
NUMBER OF RENTAL BUILDINGS: 26 + (1) U1 BUILDING
NUMBER OF UNITS PER BUILDING: 8 @ H1, L1, T1
NUMBER OF UNITS PER BUILDING: 66 @ U1
TOTAL NUMBER OF RENTAL UNITS: 274(208+66)
RECREATION BUILDING FOOTPRINT: 5,660 SF (x1)

HARDSCAPE DATA
TOTAL BUILDING FOOTPRINT: 308,537 SF (15.16%)***
TOTAL PAVEMENT: 246,755 SF
TOTAL CURBING: 0 SF
TOTAL DRIVEWAYS: 125,761 SF
TOTAL SIDEWALKS: 84,978 SF
TOTAL WALK PATH: 24,546 SF
TOTAL HARDSCAPE: 760,577 SF (37.36%)***

LANDSCAPE DATA
MINIMUM LANDSCAPING REQUIREMENT: 40.00%** (814,358 SF)
LANDSCAPE (GREEN SPACE) PROVIDED: 50.97% (1,037,703 SF)
AREA OF RETENTION PONDS: 237,616 SF (5.54 ACRES) (11.67%)***
* FOOTPRINT INCLUDES BRICK THICKNESS
** PER CITY OF NEENAH ZONING CODE (SEC. 23.220(12))
*** PERCENT OF TOTAL PROPOSED SITE ACREAGE

REVISIONS	BY	DATE

BIRSCHBACH ASSOCIATES, LTD.
ARCHITECTS
1111 E. LINCOLN AVE.
SUITE 100
NEENAH, WISCONSIN 54956
P.O. BOX 4300
NEENAH, WISCONSIN 54956
TEL: 920.735.4400
WWW.BIRSCHBACHASSOCIATES.COM

BRIDGEWOOD LUXURY APARTMENTS
DRAWN BY: tjb
APPROVED BY: [Signature]
PROJECT NO: 2021-037-00
DATE: 04-22-2022
SHEET TITLE: SITE PLAN

OPTION G.7 CS-1

"PRELIMINARY - NOT FOR CONSTRUCTION"



M E M O R A N D U M

DATE: June 25, 2024
TO: Mayor Lang and Plan Commission Members
FROM: Brad Schmidt, AICP, Deputy Director
RE: Tax Increment District #13 – Boundary Review and Project Plan

The Plan Commission will hold a public hearing at its June 25, 2024, meeting to take public comments on the creation of proposed Tax Increment District (TID) #13. The Commission will also be asked to make a recommendation to the Common Council regarding the creation of this District. The Common Council will consider the Commission recommendation, hold a public hearing, and take action on the creation of TID #13 at its July 17, 2024, meeting.

Enclosed for your review and consideration is the Project Plan for proposed Tax Incremental District #13. This new industrial district is 77 acres in area and includes City-owned land south of County Highway G and east of Dixie Road. The development of this area is challenged by scattered wetland throughout the site and the need to upgrade a portion of Dixie Road to urban standards. Therefore, tax incremental financing is warranted for this area in order to provide an economically feasible redevelopment of the area.

With the creation of TID #13, the City proposes to provide development incentives in the form of developer-funded or 'pay-as-you-go' financing. This type of funding minimizes the risk of under-performance of the District to the City while still assisting development that would not occur without the assistance of a TID #13. Public investment will also be made to improve Dixie Road immediately adjacent to, the District. This public investment will be repaid through the new property tax increment collected within the District. The net economic impact of proposed TID #13 projects the District to close in its 16th year (2040), four years ahead of its maximum allowable life.

TID #13 is proposed to be an industrial TIF district. Industrial TIF districts must include land which is suitable for industrial land use. The subject area is currently undeveloped and used for farming purposes. The Neenah Comprehensive Plan and future land use map identifies this area as Neenah Industrial Corridor and suitable for industrial land use. In addition, the City has installed water, storm and sanitary sewer infrastructure with the anticipation of future industrial use of this land. The land is zoned I1, Planned Business Center District and a development for a warehouse/distribution center was approved by Plan Commission in April 2024.

Appropriate action at this time is to approve the boundaries of Tax Increment District #13 and recommend Council approve Resolution 2024-10 creating Tax Increment District #13.

June 25, 2024

NEENAH PLAN COMMISSION RESOLUTION NO. 2024-01

RESOLUTION ADOPTING THE INITIAL OPERATING PLAN AND DESIGNATING
BOUNDARIES FOR TID #13

WHEREAS, the City of Neenah has received petitions requesting creation of TID #13; and

WHEREAS, the Neenah Plan Commission has held a public hearing, pursuant to Section 66.1109, Wisconsin Statutes for the purpose of providing interested persons the opportunity to comment on the Initial Operating plan and proposed boundaries for TID #13; and

WHEREAS, TID #13 will create a stable stream of revenue from a broad base of benefactors aimed at achieving common objectives for the benefit of property and business owners.

NOW, THEREFORE, BE IT RESOLVED, by the Neenah Plan Commission that pursuant to the provisions of Section 66.1109, Wisconsin Statutes, the Initial Operating plan is hereby adopted, and the boundaries of TID #13 are designated as described and depicted in the attached Exhibit A, which is incorporated and made part of this Resolution.

Mayor, Plan Commission Chairman

Community Development Director
Plan Commission Secretary

Passed:

Approved:

**CITY OF NEENAH TAX INCREMENT DISTRICT #13
PROJECT PLAN**

SOUTHPARK EXPANSION AREA



DATE ADOPTED BY COMMON COUNCIL: July 17, 2024
DATE ADOPTED BY JOINT REVIEW BOARD: July 18, 2024
EXPENDITURE DEADLINE: July 18, 2038
TID #13 EXPIRATION DATE: July 18, 2043

CITY OF NEENAH OFFICIALS AND STAFF

Jane B. Lang	Mayor
Cari Lendrum	Aldersperson District 1
Mark Ellis	Aldersperson District 1
Kathie Boyette	Aldersperson District 1
Dan Steiner	Aldersperson District 2
Tamara Erickson	Aldersperson District 2
Brian Borchardt	Aldersperson District 2
Bill Pollnow	Aldersperson District 3
Lee Hillstrom	Aldersperson District 3
Scott Weber	Aldersperson District 3
David Rashid	City Attorney
Charlotte Nagel	City Clerk
Vicky Rasmussen	Director of Finance
Chris Haese	Director of Community Development
Brad Schmidt	Deputy Director of Community Development
Samantha Jefferson	Community Development Specialist

PLANNING COMMISSION

Mayor Jane B. Lang	Chair
Gerry Andrews	Member
Karen Genett	Member
Dan Steiner	Aldersperson/Member
Kate Hancock-Cook	Parks and Rec. Commission Rep. /Member
Gerry Kaiser	Director of Public Works/Member
Sarah Moore-Nokes	School Board Rep. /Member
Betsy Ellenberger	Member

JOINT REVIEW BOARD

Mark Ellis	City Representative
Jon Doemel	Winnebago County
Amy Van Straten	Fox Valley Technical College
Jon Joch	Neenah Joint School District
Mike Faulks	Public Member

CITY OF NEENAH TAX INCREMENT DISTRICT #13
PROJECT PLAN
Effective January 1, 2024

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15. FIGURES

FIGURE 1 – BOUNDARY MAP

FIGURE 2 – CURRENT LAND USES

FIGURE 3 – FUTURE LAND USES/PROJECTS

FIGURE 4 – HALF-MILE BUFFER AREA

16. APPENDICES

APPENDIX A – SCHEDULE OF PROJECTED TAX BASE
GROWTH

APPENDIX B – FINANCING & FEASIBILITY PLAN

APPENDIX C – SCHEDULE OF PROJECTED TAX INCREMENTS
APPORTIONED AMONG TAXING ENTITIES

APPENDIX D – CITY ATTORNEY'S OPINION

CITY OF NEENAH TAX INCREMENT DISTRICT #13
PROJECT PLAN
Effective January 1, 2024

SUMMARY FINDINGS

- District Name: City of Neenah Tax Increment District #13.
- Location: Southpark Expansion Area.
- Purpose: Stimulate development and growth as a means to increase industrial options, stimulate employment growth, and to ensure a vital and healthy tax base.
- Effective Date: The effective date of the district for the capture of new taxable value within the boundaries of Tax Increment District #13 is January 1, 2024.
- Proposed Costs: Total Project Costs are projected to be \$6.25 million over the life of the District. All costs are based on 2024 prices and are preliminary estimates that are based on the best information available. The plan is not meant to be a budget nor an appropriation of funds for specific projects, but a framework within which to manage projects understanding the District can be in effect for a twenty-year period allowed by Wisconsin Statute. The City of Neenah reserves the right to increase these costs to reflect inflationary increases and other uncontrollable circumstances between 2024 and the time of construction. The City retains the right to delete projects or change the scope and/or timing of projects implemented as the Common Council individually authorizes them, without amending the Plan.
- Project Financing: Capital financing of \$3,150,000, utilizing borrowing proceeds.
- Project Revenues: Tax Increment District #13 is projected to create almost \$35 million of tax base through its maximum life period (2024-2043). It will generate an estimated \$10 million in tax increments during that same period.
- Economic Study: Based on project expenditures and revenue levels, all obligations of TID #13 will be paid in full at the maximum closure date of the District. At that time, the District is projected to close with a surplus revenue of \$2,281,452. Upon closure and dissolution of the District, all accrued and unencumbered increments will be promptly distributed among the local taxing entities (School District, County, Vocational District and City) and all future tax revenues will be directly distributed to them.

CITY OF NEENAH TAX INCREMENT DISTRICT #13 PROJECT PLAN

Effective January 1, 2024

INTRODUCTION

The creation of Tax Incremental District is proposed to enable the continued development of industrial sites and the stimulation of additional private industrial development within the proposed District. The property proposed for including within the District is adjacent to and an extension of the City's Southpark Industrial Center, which has a history of major development projects, job creation, tax base growth and private investment. The creation of TID #13 will continue this effort.

Tax increment financing provides the means for the City of Neenah to support economic development by upgrading public infrastructure, removing blight, completing environmental remediation, allowing for property assemblage, and awarding grants to qualified private sector recipients. Wisconsin's Tax Increment law allows the City to use property tax revenues from new development in the District to recover the City's investment in the District. After the Tax Increment District (TID) is created, the City has a 15-year period in which to make the public investment in support of private revitalization efforts. The law allows a 20-year maximum debt retirement period, during which time tax revenues generated by new development and other growth in the TID are applied by the City to pay the public investment made in the project. When all project and associated holding costs are paid off, the TID is dissolved, and all subsequent tax revenues generated are distributed to all taxing entities.

Tax increment financing ensures that the public investment made in support of private economic development efforts is done in a financially feasible manner, and that the benefits of the investment are distributed fairly - first to the affected area, and ultimately to the community as a whole. It promotes and supports growth in the tax base which otherwise might not occur. The law also recognizes that since the City is the only taxing unit that assumes financial risk in a District, it is entitled within a prescribed time period to receive all new tax revenues of the TID as the source of paying off its public investment costs. All taxing entities subsequently receive future benefits from the expanded tax base that was generated as a result of the City's TID investment.

The general development objectives of this Plan are:

- Provide project and site improvements, including environmental remediation, utilities, street and intersection enhancements and other improvements necessary for carrying out the development objectives of this Plan.

- Improve traffic circulation and access through road improvements that promote ease, convenience, and safety for both pedestrian, vehicular, and public transit forms of transportation.
- Support committed public-private partnerships to achieve high value development projects.
- Provide cleared and fully improved sites for industrial development.
- Assemble and reconfigure land into parcels suitable for disposition and redevelopment.
- Promote a pattern of development to maximize use of public infrastructure.
- Offer a superior development that will attract and retain employers and employees.

BOUNDARIES

The boundaries of TID #13 are illustrated in Figure 1. All wetlands within the boundaries of TID #13 are excluded from inclusion within the TID.

NAME OF DISTRICT

The name of the TID shall be City of Neenah, Tax Increment District #13 (TID #13).

CREATION DATE

The date of creation for the capture of all new taxable value created within TID #13 shall be January 1, 2024. This shall be used as the base in computing any increments that may accrue in the tax base for the District.

PROPOSED IMPROVEMENTS AND PROJECT COSTS

Table 1 provides a listing of proposed improvements and project costs for TID #13. These are the projected activities that may be required in the District at this time. However, as development of the District begins to occur, it may dictate additions or deletions from the following list. The City of Neenah reserves the right to such additions and deletions to the project list to the full extent allowed by law. Existing land uses are illustrated in Figure 2 and proposed uses are illustrated in Figure 3. A half-mile buffer around TID #13 and in which project costs may be incurred is illustrated in Figure 4.

Project costs for TID #13 will encompass five areas:

1. Utility and Street Improvements - Funds will provide upgraded public utilities, streets, intersection improvements, access improvements and infrastructure to support development within the district.

2. Development Assistance - Funds will be provided to assist with activities such as utility and infrastructure installation, land assemblage, clearing, site preparation, wetland mitigation and building construction at target sites where the private sector is committed to high value project that will increase the tax base. Cash grants to qualified private sector recipients may be provided as redevelopment assistance as well.
3. Property Assembly – Funds will be provided to assemble real estate necessary to support the planned developments and to ensure the highest degree of benefit to the District.
4. Beautification/Signage/Public Space – Funds will be provided to assist with beautification and signage efforts deemed to be necessary for the overall good of the District.
5. Planning/Project Support - Administrative costs of managing district activities including promotion and development, engineering, environmental and organizational cost.

Table 1
Project Costs

Project/Activity	Total Cost	Estimated Timing
Utility & Street Improvements	\$2,035,000	2026-2027
Development Assistance	\$3,100,000	2025-2037
Property Assembly	\$900,000	2024
Beautification/Signage/Public Space	\$50,000	2027-2028
Planning/Project Support	\$165,000	2024-2034
TOTAL	\$6,250,000	-

NON-PROJECT COSTS

There are no anticipated non-project costs within TID #13.

RELOCATION

Some potential redevelopment projects could require the acquisition of private properties, which might involve the displacement of families or businesses. All individuals, families, and business operations that might be displaced as a result of the City’s activities are entitled to assistance in conformance with the requirements set forth in Chapter 32, Wisconsin Statutes, and the Federal Uniform Relocation Assistance and Real Property Acquisition Policies Act, as applicable.

MASTER PLAN, ZONING, BUILDING AND OTHER CODE CONSIDERATIONS

Proposed TID #13 is consistent with the goals, objectives and strategies of the City of Neenah Comprehensive Plan. The Comprehensive Plan specifically identifies the need for maintaining a strong, diverse economic base that can provide steady employment with quality of jobs. The use of tax incremental financing is specifically identified in the Comprehensive Plan as a tool the City should use as a means to accomplish development

and revitalization objectives throughout the City. City partnership and support, through the formation of TID #13, will be required for successful and sustained local economic growth to occur -- much the same as the initiatives taken in the Southpark Industrial Center, Downtown and Westside business corridors. Appropriate zoning designations and regulations are in place to manage development in the District. No changes to zoning or building codes are anticipated.

ECONOMIC FEASIBILITY STUDY

Total revenues generated from property tax increments are projected to offset total costs, within the maximum allowed 20-year life of the District. Consequently, the proposed TID #13 is economically feasible. Projected tax base growth is presented in Appendix A, and a financing plan and feasibility analysis is presented in Appendix B.

The total projected costs of public improvements and activities over the life of the District (2024-2043) are projected to be \$6,250,000. The District is expected to create almost \$35 million of tax base through its maximum life period (2024-2043) and will generate an estimated \$10 million in tax increments during that same period.

Based on projected expenditure and revenue levels, all obligations of TID #13 will be paid by the termination date of the District at which time the District is projected to have a surplus revenue of \$2.28 million. Upon closure and dissolution of the District, all remaining unencumbered increments will be promptly distributed among all taxing entities (School District, County, Vocational District and City). Following closure and dissolution, the tax base created as a result of development in the District will directly benefit the taxing entities and all future tax revenues will be directly distributed to them.

Recognizing that all taxing entities involved in the District will accrue significant long-term benefits from the projected success of TID #13, the City realizes that each entity is also a continuing partner in its progress, in that they will forego tax benefits on new development in the District until it is dissolved. Appendix C shows the projected increments over the life of the District, apportioned among the four entities, based on the formula prescribed by the Wisconsin Department of Revenue.

The following economic assumptions have been applied when developing the Project Plan for TID #13:

- The base equalized value of TID #13 has been established at \$160,000, which was the equalized value of real estate and personal property within this area on January 1, 2024.
- The current equalized tax rate of \$16.00 is assumed to remain level throughout the life of the District. For purposes of the Economic Feasibility Study, the equalized tax rate of \$16.00 was utilized in all calculations.

- General Obligation (G.O.) Notes and Bonds as well as non-tax-exempt borrowing represent annual capital borrowing for public investment in the District. Repayment of principal will occur on a schedule to match with accruing tax increments.
- Interest rates have been projected at 3.00% for general borrowing, approximately the same level as current Aa/AA-rated G.O. Notes, and 6% for non-tax-exempt borrowing. Guidance for estimating future rates was provided by the City’s financial advisor. No attempt has been made to anticipate cyclical rate changes in future years. Principal and interest payments of future scheduled debt installments are being planned to match the estimated tax increments generated on an annual basis.

FINANCING

The City of Neenah plans the use of G.O. Notes and Bonds or other permitted loan instruments in order to finance or refinance the costs of TID #13. City borrowing will be phased to coincide with need and refinancing schedule as necessary to properly manage the District’s affairs.

Another option for financing is the use of developer-funded or “pay as you go” financing which minimizes the risk of non-performance of the TID to the City, while still assisting development that would not occur without assistance of a tax increment district. The type and method of financing each project in this District shall be made on a project-by-project basis to support the success of the District.

Repayment costs will be funded from tax increments generated by new tax base growth in the District.

ORDERLY DEVELOPMENT

The creation of TID #13 will promote the City’s goal of orderly and sustained development. By supporting efforts to improve the District, the City will help to ensure a healthy tax base and economy for the entire community.

EXISTING USES AND CONDITIONS

Figure 2 illustrates the existing land use patterns and conditions of real property within TID #13.

FINDINGS

- Land within TID #13 is suitable for industrial development and all property is zoned for Industrial.
- No percentage of the district will be devoted to retail business.
- The development and revitalization of property within TID #13 will significantly enhance the value of all property in the District. Supporting private investment at key sites will increase property values District-wide.

- It is estimated that as of January 1, 2024, using equalized values, the base value of TID #13 plus the increment values of TID #7, TID #8, TID #9, TID #10, TID #11, and TID #12 totals \$254,812,700, which is 8.2% of the total of all taxable property in the City of Neenah as shown below. State law requires that those values not exceed 12%.

TID #7 Increment Value (est)	\$124,869,300	
TID #8 Increment Value (est)	\$85,362,900	
TID #9 Increment Value (est)	\$9,971,300	
TID #10 Increment Value (est)	\$16,857,100	
TID #11 Increment Value (est)	\$16,982,300	
TID #12 Increment Value (est)	\$609,800	
TID #13 Base Value (est)	\$160,000	
Total	\$254,812,700	
		÷
Total City Equalized Value (est)	\$3,108,017,600	=8.2%

- Based on projected expenditures and revenues all obligations of TID #13 will be paid in full prior to dissolution of the District.

**CITY OF NEENAH TAX INCREMENT DISTRICT #13
PROJECT PLAN**
Effective January 1, 2024

FIGURES

FIGURE 1 – BOUNDARY MAP

FIGURE 2 – CURRENT LAND USES

FIGURE 3 – FUTURE LAND USES/PROJECTS

FIGURE 4 – HALF-MILE BUFFER AREA

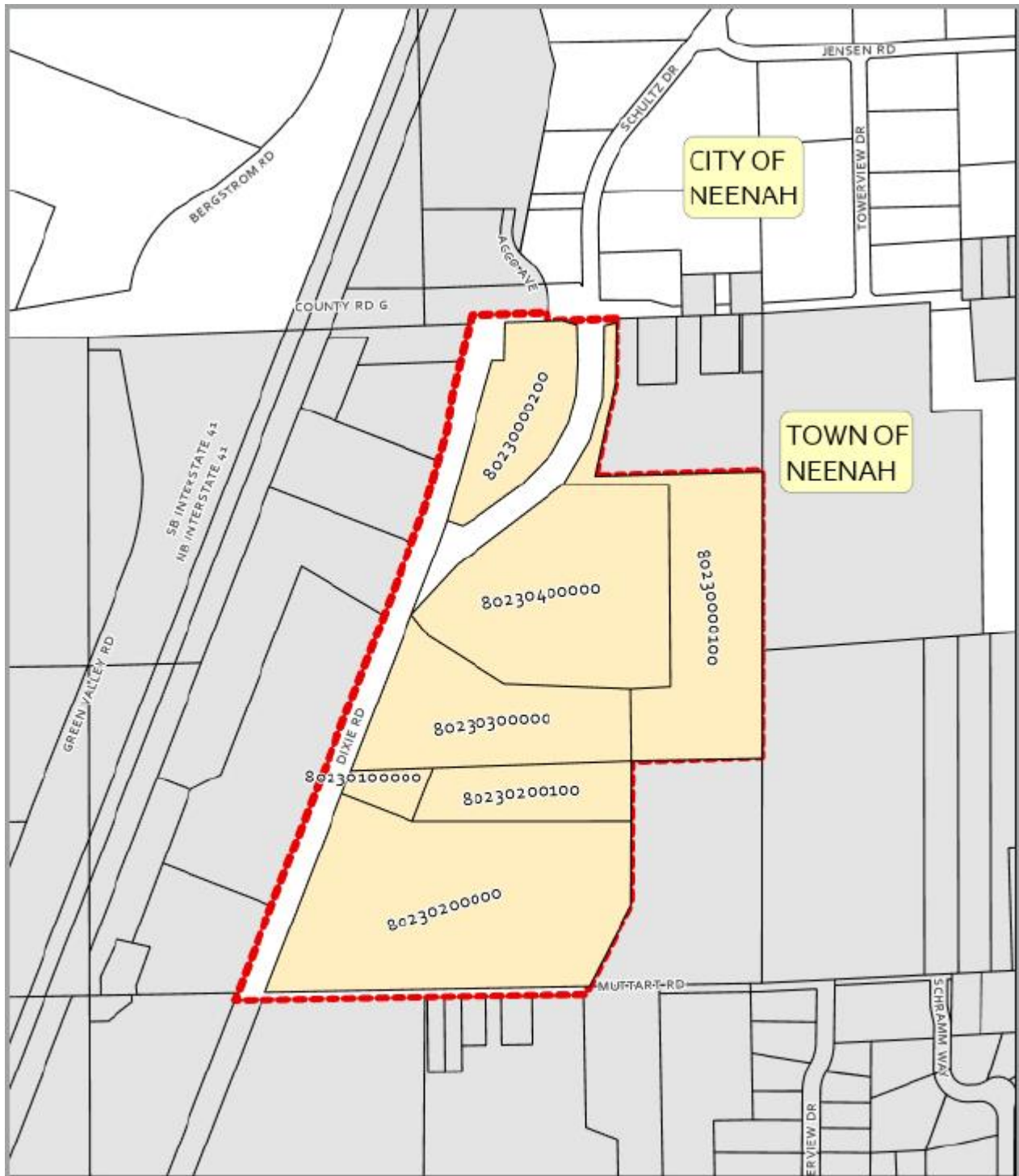
APPENDICES

APPENDIX A – SCHEDULE OF PROJECTED TAX BASE GROWTH

APPENDIX B – FINANCING & FEASIBILITY PLAN

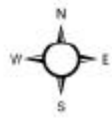
**APPENDIX C – SCHEDULE OF PROJECTED TAX INCREMENTS APPORTIONED AMONG
TAXING ENTITIES**

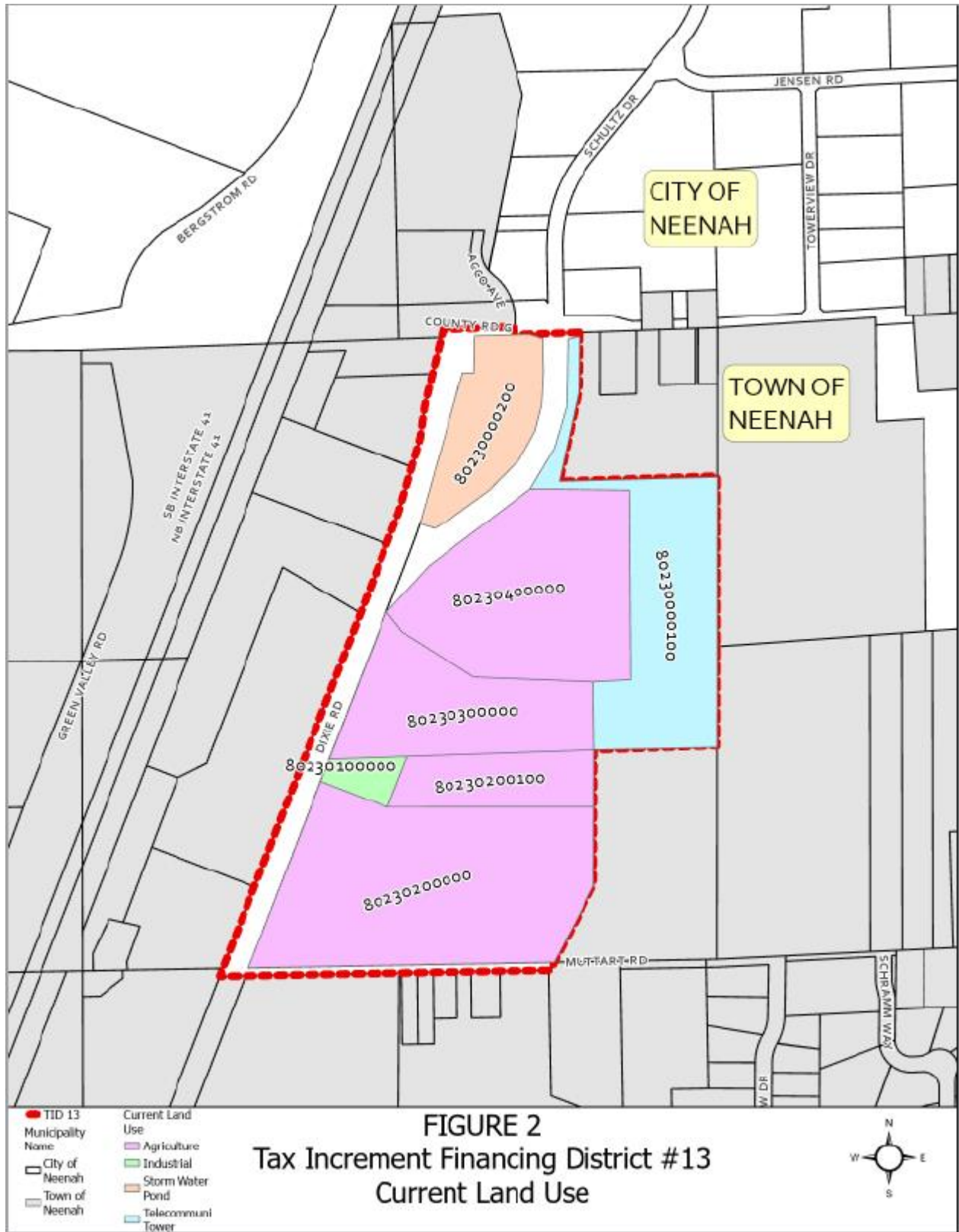
APPENDIX D – CITY ATTORNEY’S OPINION

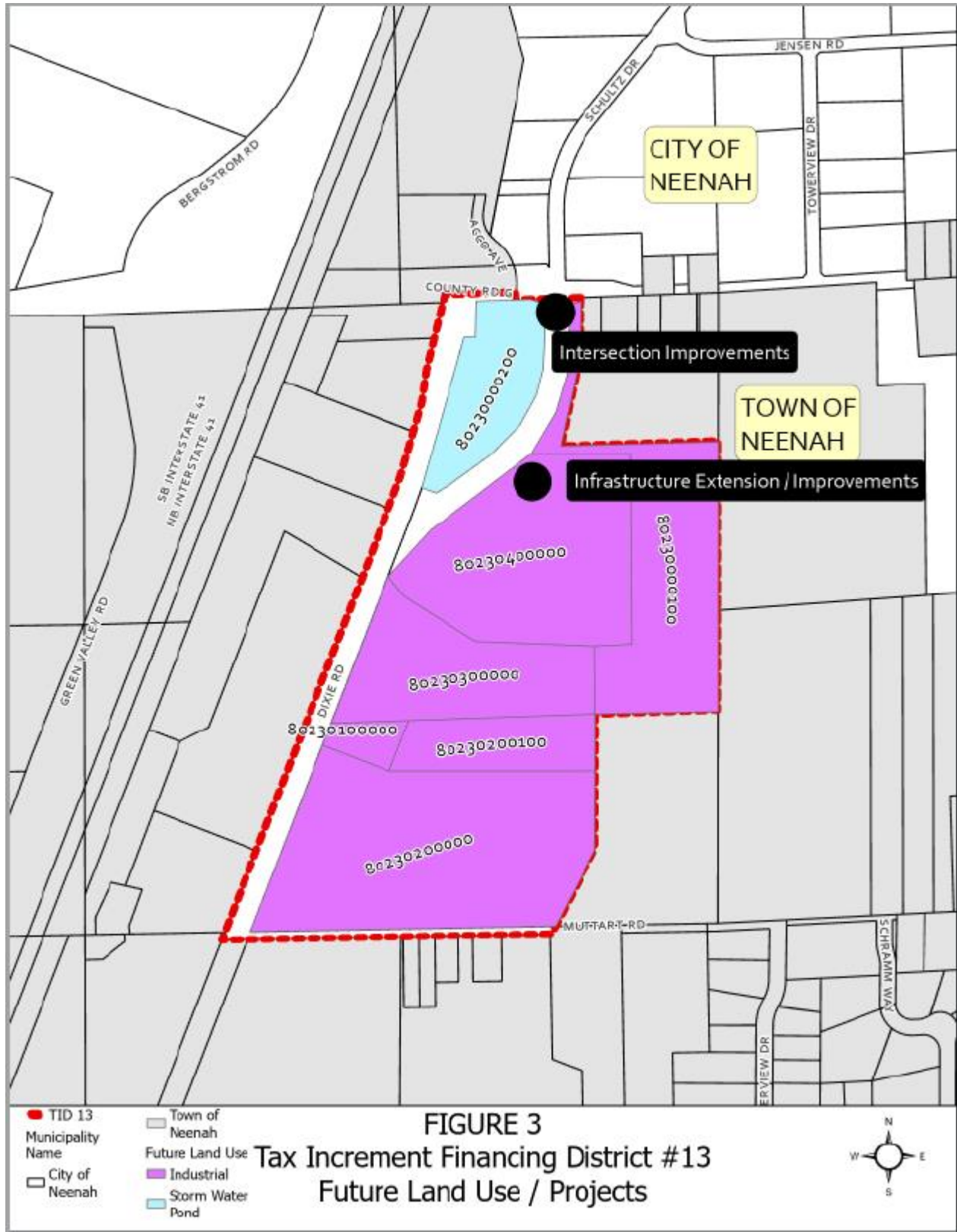


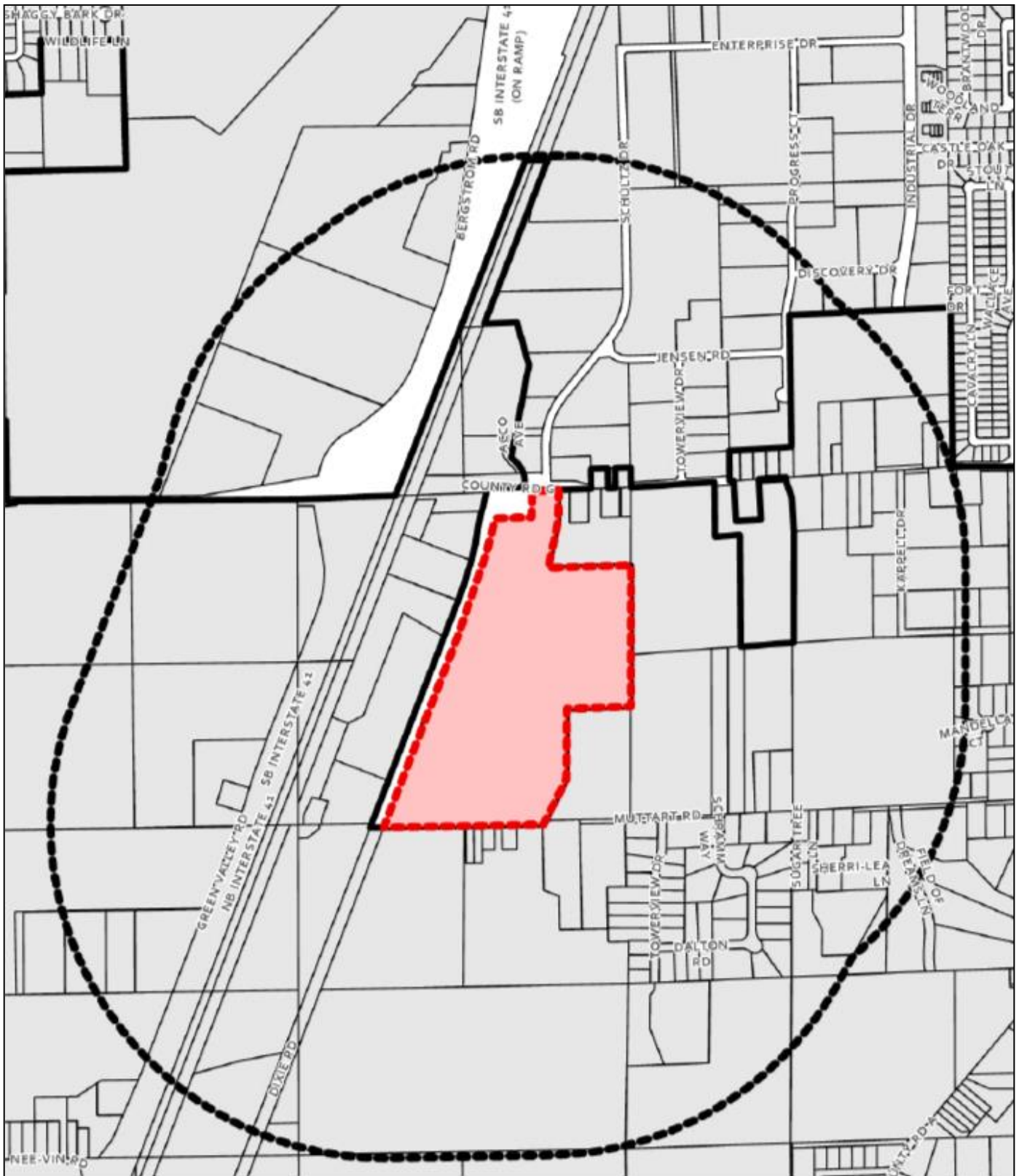
- TID 13
- Municipality Name
- City of Neenah
- Town of Neenah

FIGURE 1
Tax Increment Financing District #13
TID Boundary









-  TID 13
-  Municipality Name
-  City of Neenah
-  Half Mile Buffer

FIGURE 4
Tax Increment Financing District #13
Half-Mile Buffer



APPENDIX B
FINANCING & FEASIBILITY PLAN

APPENDIX B
FINANCING AND FEASIBILITY PLAN
TAX INCREMENTAL FINANCING DISTRICT #13

	Years			Project Costs				Other Costs		Capital Borrowing		Total Annual Plan Costs	Projected Revenues			Total Annual Plan Revenues	Total Cumulative Plan Revenues	Net Excess Revenue Over Costs	Cumulative Revenue Over Costs	
	TID Year	Value Base Year	Increment Collection Year	Revel. Assistance Incentives	Property Assembly	Utility & Access Improve.	Planning & Project Support	Beautification/ Signage/ Public Space	Admin/ Interest	Other	Debt Service Principal		Debt Service Interest	Property Tax Increment Projected	Computer Exemption Payment					Land Lease/ Other
	1	2024	2025	\$0	\$900,000	\$0	\$15,000	\$0	\$0	\$0	\$63,068	63,068	\$0	\$0	\$0	\$0	\$0	(\$63,068)	(\$63,068)	
	2	2025	2026	270,000	0	0	65,000	0	40,000	1,000	0	63,420	374,420	205,440	0	0	205,440	205,440	(168,980)	(232,048)
	3	2026	2027	270,000	0	2,035,000	15,000	0	40,000	1,000	296,000	124,470	731,470	397,440	0	0	397,440	602,880	(334,030)	(566,078)
	4	2027	2028	270,000	0	0	10,000	50,000	40,000	1,000	313,000	112,410	736,410	557,440	0	0	557,440	1,160,320	(178,970)	(745,048)
	5	2028	2029	270,000	0	0	10,000	0	40,000	1,000	323,000	99,630	733,630	557,440	0	0	557,440	1,717,760	(176,190)	(921,238)
	6	2029	2030	270,000	0	0	10,000	0	40,000	1,000	337,000	86,340	734,340	557,440	0	0	557,440	2,275,200	(176,900)	(1,098,138)
	7	2030	2031	270,000	0	0	10,000	0	40,000	1,000	335,000	72,420	718,420	557,440	0	0	557,440	2,832,640	(160,980)	(1,259,118)
	8	2031	2032	270,000	0	0	10,000	0	40,000	1,000	348,000	58,320	717,320	557,440	0	0	557,440	3,390,080	(159,880)	(1,418,998)
	9	2032	2033	270,000	0	0	10,000	0	40,000	1,000	362,000	43,590	716,590	557,440	0	0	557,440	3,947,520	(159,150)	(1,578,148)
	10	2033	2034	270,000	0	0	10,000	0	40,000	1,000	381,000	28,170	720,170	557,440	0	0	557,440	4,504,960	(162,730)	(1,740,878)
	11	2034	2035	270,000	0	0	0	0	40,000	1,000	225,000	11,910	547,910	557,440	0	0	557,440	5,062,400	9,530	(1,731,348)
	12	2035	2036	270,000	0	0	0	0	40,000	1,000	230,000	5,160	546,160	557,440	0	0	557,440	5,619,840	11,280	(1,720,068)
	13	2036	2037	130,000	0	0	0	0	40,000	1,000	0	0	171,000	557,440	0	0	557,440	6,177,280	386,440	(1,333,628)
Projected Closure Date	14	2037	2038	0	0	0	0	0	40,000	1,000	0	0	41,000	557,440	0	0	557,440	6,734,720	516,440	(817,188)
	15	2038	2039	0	0	0	0	0	40,000	1,000	0	0	41,000	557,440	0	0	557,440	7,292,160	516,440	(300,748)
	16	2039	2040	0	0	0	0	0	40,000	1,000	0	0	41,000	557,440	0	0	557,440	7,849,600	516,440	215,692
	17	2040	2041	0	0	0	0	0	40,000	1,000	0	0	41,000	557,440	0	0	557,440	8,407,040	516,440	732,132
Current Maximum Closure Date	18	2041	2042	0	0	0	0	0	40,000	1,000	0	0	41,000	557,440	0	0	557,440	8,964,480	516,440	1,248,572
	19	2042	2043	0	0	0	0	0	40,000	1,000	0	0	41,000	557,440	0	0	557,440	9,521,920	516,440	1,765,012
	20	2043	2044	0	0	0	0	0	40,000	1,000	0	0	41,000	557,440	0	0	557,440	10,079,360	516,440	2,281,452
	Totals			\$3,100,000	\$900,000	\$2,035,000	\$165,000	\$50,000	\$760,000	\$19,000	\$3,150,000	\$768,908	\$7,797,908	\$10,079,360	\$0	\$0	\$10,079,360	\$2,281,452	n/a	

\$3,150,000

APPENDIX C
 SCHEDULE OF PROJECTED TAX INCREMENTS
 APPORTIONED AMONG TAXING ENTITIES

APPENDIX C
 SCHEDULE OF PROJECTED TAX INCREMENTS
 APPORTIONED AMONG TAXING ENTITIES
 TAX INCREMENT DISTRICT #13

			** ESTIMATED APPORTIONMENT among TAXING ENTITIES **				
Tax TID Year	Incremen Collection Year	Projected Tax Increment	Neenah School District 35.37%	City of Neenah 39.32%	Winnebago County 21.14%	Fox Valley Technical College 4.17%	State of Wisconsin 0.00%
1	2024	\$0	\$0	\$0	\$0	\$0	\$0
2	2025	205,440	72,664	80,779	43,430	8,567	0
3	2026	397,440	140,575	156,273	84,019	16,573	0
4	2027	557,440	197,167	219,185	117,843	23,245	0
5	2028	557,440	197,167	219,185	117,843	23,245	0
6	2029	557,440	197,167	219,185	117,843	23,245	0
7	2030	557,440	197,167	219,185	117,843	23,245	0
8	2031	557,440	197,167	219,185	117,843	23,245	0
9	2032	557,440	197,167	219,185	117,843	23,245	0
10	2033	557,440	197,167	219,185	117,843	23,245	0
11	2034	557,440	197,167	219,185	117,843	23,245	0
12	2035	557,440	197,167	219,185	117,843	23,245	0
13	2036	557,440	197,167	219,185	117,843	23,245	0
14	2037	557,440	197,167	219,185	117,843	23,245	0
15	2038	557,440	197,167	219,185	117,843	23,245	0
16	2039	557,440	197,167	219,185	117,843	23,245	0
17	2040	557,440	197,167	219,185	117,843	23,245	0
18	2041	557,440	197,167	219,185	117,843	23,245	0
19	2042	557,440	197,167	219,185	117,843	23,245	0
20	2043	557,440	197,167	219,185	117,843	23,245	0
TOTALS		\$10,079,360	\$3,565,070	\$3,963,204	\$2,130,777	\$420,309	\$0

NOTE: Estimated apportionment percentages are based upon the actual apportionment of taxes for the 2023 Tax Collection Year (2022 Tax Levy).



Dept. of Legal & Administrative Services
Office of the City Attorney
211 Walnut St. • P.O. Box 426 • Neenah WI 54957-0426
Phone: 920-886-6106 • Fax: 920-886-6100
CITY ATTORNEY

June 7, 2024

Mr. Chris Haese
Director of Community Development & Assessment
211 Walnut Street
Neenah, WI 54956

Re: Tax Increment District No. 13

Dear Mr. Haese:

You have asked me for a legal opinion as to the legal sufficiency and statutory compliance of the project plan for the creation of Tax Incremental District No. 13 in the City of Neenah. I have reviewed the Project Plan for said district as well as the appendices attached thereto in relation to their compliance with the provisions of Section 66.1105, Wis. Stats. It is my opinion that the TID No. 13 Project Plan is in compliance with all of the provisions of Section 66.1105, Wis. Stats., dealing with the creation of tax incremental financing districts. This opinion is being offered in accordance with the requirements of Section 66.1105(4)(f), Wis. Stats.

If you have any questions concerning this matter, please contact me at your convenience.

Sincerely,

James P. Walsh
Interim City Attorney
City of Neenah



M E M O R A N D U M

DATE: June 25, 2024
TO: Chairman Lendrum and members of the Public Services and Safety Committee
FROM: Brad Schmidt, AICP – Community Development Department
RE: Housing Study and Needs Assessment – Stantec Consulting Services, Inc.

The Community Development Department recommends Stantec Consulting Services, Inc (Stantec) to assist in the creation of a housing study and needs assessment for a cost not to exceed \$40,000. Stantec was one of ten professional consulting firms who responded to the request for proposal, with project costs ranging from \$25,000 - \$60,000.

What's a Housing Study and Needs Assessment?

A housing study and needs assessment is a study that analyzes population, demographic, economic, and housing data to provide an overview of a community's housing market and projects future housing demand based on population growth, demographic changes, and other factors. In addition, a housing study will develop specific strategies to strengthen Neenah's housing market, identify barriers to housing development in the Municipal Code, and identify creative solutions to improving housing affordability and increasing the supply and types of housing in the city.

How were the proposals reviewed?

The housing study proposals were evaluated by an internal review team based on the following review criteria:

- Demonstration of a clear understanding of the scope of services listed in the Request for Proposals (RFP).
- Evaluation of relevant housing study examples.
- The project team's experience related to housing studies.
- Ability to complete the project in the required timeline.
- Project cost.

The review team then narrowed the proposals and interviewed four firms to better understand their overall approach to the project, data collection and analysis methodologies, and final report layout with an emphasis on strategy development. Finally, several of Stantec's most recent clients (cities) were interviewed to determine whether Stantec met their expectations and to gain insight into Stantec's ability to develop a housing study that provided the creative strategies to meet the housing needs of the community.

Why Stantec?

Stantec met all the qualification criteria the review team developed to objectively review and compare proposals amongst the 10 firms that submitted a proposal. Stantec's proposal includes a detailed work plan which identifies a clearly defined step-by-step process with a robust data collection phase using publicly available US Census data, City housing data and

third-party data (CoStar and Replica) to better understand Neenah’s ownership and rental housing markets. In addition, the proposal includes a qualitative data collection phase where housing stakeholders will be interviewed, and a community survey will be conducted to gauge the public on housing matters. Stantec’s data analysis methodology also stood out, specifically their housing gap assessment which provides a real-time overview of Neenah’s housing supply and demand. The assessment is also able to provide a breakdown of housing needs by income level, providing information on Neenah’s housing affordability.

Stantec is an industry leader in developing housing studies and have created housing studies in Wisconsin and throughout the United States. Their project team has decades of experience and is led by a housing and city planning expert with over 20 years of experience. The item that stood out the most in their approach, however, is their focus on developing creative strategies to meet the local housing needs of the community which include case studies of how those strategies have worked in other communities.

Timeline

MONTH	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER
PHASE	Kickoff	Analysis	Strategies	Document	
Task 1: Project Management and Coordination					
1.1 KICK-OFF MEETING WITH CITY STAFF	█				
1.2 SITE TOUR	█				
1.3 ONGOING COORDINATION WITH CITY STAFF	█	█	█	█	█
Task 2: Stakeholder Engagement					
2.1 HOUSING STUDY COMMITTEE		█	█		
2.2 STAKEHOLDER AND DEVELOPER INTERVIEWS	█	█	█		
2.3 PRESENTATION TO CITY COUNCIL					█
2.4 HOUSING SURVEY		█	█		
Task 3: Demographic and Economic Analysis					
3.1 DEMAND DRIVERS	█	█	█		
3.2 POPULATION DEMOGRAPHICS	█	█	█		
3.3 ECONOMIC BASE AND EMPLOYEE DEMOGRAPHICS	█	█	█		
Task 4: Housing Market Analysis					
4.1 MARKET CONTEXT MAP	█	█	█		
4.2 DEVELOPMENT TRENDS	█	█	█		
4.2 MARKET DYNAMICS	█	█	█		
Task 5: Housing Inventory					
5.1 HOUSING INVENTORY ANALYSIS	█	█	█		
Task 6: Housing Gap Analysis					
6.1 HOUSING GAPS BY TENURE, TYPE, SIZE, AND AFFORDABILITY			█	█	
6.2 QUALITATIVE HOUSING GAP CONSIDERATIONS			█	█	
6.3 HOUSING NEEDS FORECAST			█	█	
Task 7: Housing Strategies and Action Plan					
7.1 HOUSING STRATEGIES			█	█	
Task 8: Housing Study Document					
8.1 DRAFT REPORT FOR REVIEW				█	█
8.2 FINAL REPORT					█

Recommendation

An appropriate motion is to recommend Common Council direct staff to enter into a contract with Stantec Consulting Services, Inc for the services related to the preparation of a housing study and needs assessment at a not-to-exceed cost of \$40,000, with funding provided by the City’s CDBG program.



Request for Proposals

City of Neenah, WI

Issued: April 22, 2024

Housing Study and Needs Assessment

Contact: Brad Schmidt, AICP
Deputy Director of Community Development
920.886.6126 | BSchmidt@NeenahWI.Gov
www.NeenahWI.gov

INTRODUCTION

The City of Neenah desires to conduct a city-wide housing study and needs assessment. The results of this housing study will help elected officials, city staff, stakeholders and community members develop a meaningful sense of the housing market, as well as an understanding of key housing issues affecting the City. The report is intended to offer community leaders and stakeholders a basis for formulating community-specific housing priorities, policy alternatives and intervention strategies, including land use and zoning decisions.

COMMUNITY BACKGROUND

Located along the northern shores of Lake Winnebago in northeastern Wisconsin, the City of Neenah has a population of 27,238 (2020 US Census). Neenah is part of the Oshkosh-Neenah MSA which has a population of 171,730 (2020 US Census). Neenah is home to several major employers including Plexus Corporation, ThedaCare Regional Medical Center, Alta Resources Company, Menasha Corp, and Neenah Enterprises, Inc. Owner-occupied housing accounts for about 64 percent of all occupied housing in the city. However, renter-occupied housing has increased between 2010 and 2020. Between 2010 and 2023, the city averaged 42 new single-family dwelling units per year compared to 29 multi-family dwelling units over the same time period. The city continues to see more interest in multi-family and townhouse development, as the costs associated with single-family development increase and the availability of suitable developable land decreases.

SCOPE OF SERVICES

The study shall include an assessment of existing housing conditions, demographic and housing market demands, and identify critical housing gaps and issues. The study should include an outlook of anticipated housing demands over the next 10 years. It is expected the study will review the City's [Zoning Code](#) and [Subdivision Ordinance](#) to identify opportunities to increase housing options and diversify housing types. Finally, the study shall include recommendations which are consistent with the goals and objectives of the [City's Comprehensive Plan 2040](#).

The study should help answer the following questions:

- What is the existing state of the housing market and housing stock in the city? How has the local housing market changed over the last 10 years?
- What are the current, 5-year, and 10-year housing needs in the city? Where do gaps exist in terms of housing type and price range of housing? What changes should be made to address these gaps? How do population, employment and economic projections and anticipated changes in demographics impact the housing needs in the future?

- What impact does the addition of new multi-family housing have on the existing rental housing stock and market? What is the City's absorption rate for new rental housing units annually?
- Are there changes that can be made to the City's Zoning Code or Subdivision Ordinance which can help increase the number of housing units and increase the variety of housing types? What modifications to the Zoning Code or Subdivision Ordinance are needed to implement the recommendations of the Housing Study?
- How can the city partner with developers to make housing more affordable? What barriers exist to reducing the costs of owner-occupied housing and what can the city do to increase home ownership while reducing the costs of home ownership?
- Are the housing needs for workforce housing and housing for sensitive population being met? What gaps exist in housing for these populations and how should the city address these gaps?

Necessary Study Components:

- Demographic Review
- Inventory of existing housing stock
- Housing Market Analysis
- Housing Demand
- Housing needs analysis and prioritization
- Summary of results from focus groups, community surveys and interviews with stakeholders
- Recommendations:
 - Plan to address housing gaps.
 - City Zoning Code/Subdivision Ordinance modifications
 - Housing Assistance Programs
 - Housing Related Investments
 - Marketing Efforts
- Examples of innovative housing programs in similarly situated communities.

SCHEDULE:

The city would like to have a completed study done and available for business and community use by the end of 2024. The City reserves the right to revise the following tentative schedule:

RFP disseminated to potentially interested firms	April 22, 2024
Proposal due	May 24, 2024
Evaluation of proposals	May 24, 2024 – June 3, 2024
Recommendation by the City Finance Committee to Common Council	June 11, 2024
Common Council approves consultant	June 19, 2024
Execution of contract for services	June 19, 2024 – June 26, 2024
Notice to proceed	June 26, 2024
Milestone dates provided by consultant as part of proposal (include preliminary findings and plan refinements)	*****
Final report to the city	November 15, 2024

RESPONSIBILITIES OF THE CITY

The City of Neenah will provide the following services as part of the total project:

- a. The city will provide access to present and historic housing records (e.g. building permit and assessment records) and maps.
- b. Existing City plans and research:
 - a. City of Neenah Zoning Code and Subdivision Ordinance
 - b. City of Neenah Comprehensive Plan (Updated in March 2024)
- c. Upon request, the City's GIS Coordinator can provide GIS support and data for the projects. The city intends to work with the selected consultant to keep mapping costs to a minimum.
- d. Staff will assist in project management and administration. Staff will attend all meetings with the Consultant as a liaison between the Public and the Consultant, upon Consultant's request. To keep costs related to travel at a minimum, virtual meetings are accepted as part of this proposal.
- e. Staff will coordinate and schedule all meetings involving the Consultant. City staff will mail agendas, meeting minutes and meeting information packets.

SUBMISSION

Proposal Content:

The City of Neenah respectfully requests a proposal from your firm for the provision of the services identified above. The brief proposal shall include the following:

1. A statement of the consultants understanding that demonstrates knowledge of the project requirements.
2. A description of the consultant's technical approach to the project, including an outline of the sequence of tasks, major benchmarks and milestone dates.
3. A brief summary, with resumes attached, of key staff on the project team who will be directly involved in the project. Staff resumes should focus on individuals who will have primary responsibility for performance of the work with less emphasis on firm principals.
4. A description of similar project experience involving key staff to be involved in the project. The consultant agrees to provide references upon request.
5. Proposed use of City staff as well as any equipment, materials or additional data that will be expected from the city at the onset of the project.
6. Agreement to accomplish the project within the time frame contained in this RFP.
7. Estimated cost of the services to be provided under this proposal.
8. Proposed services to be sub-contracted if any, anticipated subcontractors, and anticipated costs for these services.

Any additional terms or conditions, which are deemed necessary for entering into a contract with the City, should be attached or incorporated as part of the proposal.

All proposals become the property of the City of Neenah and will not be returned. The City reserves the right to reject any or all proposals, to waive technicalities, or to negotiate further with a responder who appears to most nearly meet the City's desires.

EVALUATION

Selection will be based upon the proposals submitted and will be ranked primarily based upon the following criteria:

1. Consultant's understanding and technical approach to the project.
2. Consultant's ability to meet project schedule.
3. Pertinent experience and qualifications of the project team.
4. Relative value of the services to be provided. (Cost will not be the primary determining factor but will be a consideration)

DELIVERABLES

The final report should be delivered to the City of Neenah Community Development Department as a PDF file. An electronic copy of the final report presentation materials should

be provided as well.

SUBMISSION DEADLINE AND DELIVERY

Proposals are due in the City of Neenah Community Development Office, 211 Walnut Street Room 313 Neenah, Wisconsin 54956, no later than **May 24, 2024**. Preference for submission of the proposals is in digital format by email (BSchmidt@NeenahWI.gov), but hard copy proposals will also be accepted. All proposals will be evaluated by an internal project review team.

CONTACT

All inquiries shall be directed to Brad Schmidt, Deputy Director of Community Development at BSchmidt@NeenahWI.gov or (920) 886-6126.

Stantec's Proposal for Housing Study and Needs Assessment

May 24, 2024



PREPARED FOR: CITY OF NEENAH



Cover Letter



May 24, 2024

Attention:

Brad Schmidt,
Deputy Director of
Community Development
City of Neenah
City of Neenah Community
Development Office,
211 Walnut Street, Room 313,
Wisconsin 54956

Regarding:

Request for Proposals (RFP):
Housing Study and Needs
Assessment for the City of
Neenah, Wisconsin

Office Locations

733 Marquette Avenue
Suite 1000
Minneapolis, Minnesota 55402

Main Contact:

Tom Leighton, AICP, EDFP
Project Manager
733 Marquette Avenue
Suite 1000
Minneapolis, Minnesota 55402
612-712-2154
tom.leighton@stantec.com

Dear Mr. Schmidt and members of the selection committee,

Thank you for the opportunity to submit a proposal for the City of Neenah's Housing Study and Needs Assessment. Housing availability is one of the most pressing issues of our time, and your Request for Proposals (RFP) speaks to your need for a housing-related analysis that leads to insights about how to address local challenges. In the RFP, you noted the need for workforce housing, and housing for sensitive populations. And you were interested in whether regulatory strategies and development partnerships can play a role in addressing local needs.

Addressing housing challenges requires two things—a sharp analysis of current and forecasted market dynamics, and the identification of a broad range of innovative strategies and solutions.

Because of the depth and universality of housing issues across our region, Stantec's Development Economics Team has put an intense focus on developing new analytical methodologies. We have built a library of strategies, best practices, and case studies to support communities at every scale. We don't take a generalized approach to housing studies. Our approach, analysis, and strategic research will be customized to your situation and needs.

Our analytical methodologies are legitimately cutting-edge, providing a clearer and more current understanding of housing gaps than what is typical. And we don't want this study to sit on the shelf. The primary outcome of our work will be a toolkit of actionable strategies that can be considered for meeting local needs and supporting growth. Developed collaboratively with you, it will include solutions, case studies, and best practices that encompass policy, zoning, and other regulatory strategies; context setting, predevelopment, and financial strategies; ownership and partnership building strategies.

Beyond these technical qualifications, we take pride in being skilled communicators, facilitators, and consensus builders—factors particularly relevant to housing strategies' complex arena. Through our work, we've utilized all kinds of creative community engagement strategies—which can play a role in housing studies to understand local conditions more deeply, educate the public, and put a human face on local housing needs.

Our team is excited to work with you to identify strategies for addressing Neenah's housing challenges. If you have any questions or require additional information, please do not hesitate to contact us.

Sincerely,

STANTEC CONSULTING SERVICES INC.

Tom Leighton, AICP, EDFP
Project Manager
612-712-2154
tom.leighton@stantec.com



INTRODUCTION

We understand the development dynamics and the developer perspective through direct experience from supporting developers on single-family subdivisions and a range of multifamily products.

Firm Overview

Since 1954, our local strength, knowledge, and relationships, coupled with world-class expertise, have allowed us to go anywhere to meet our clients' needs in more creative, personalized ways. The Stantec community unites more than 26,000 employees working in over 400 locations across 6 continents. We're planners, scientists, designers, engineers, and project managers, innovating together at the intersection of community, creativity, and client relationships. Our interdisciplinary teams undertake projects that advance the quality of life in communities across the globe. From rural to urban, we lay the foundation for creating the communities of today and of the future.

Planning and economic development require problem solving. To create careful and thoughtful options for communities, we consider site conditions, public input, client needs, and project requirements. We understand the value of process, collaboration, and consensus building among stakeholders, while never losing sight of client and project goals.

The core of this project team is based in Minneapolis, and includes the leadership of Stantec's national Development Economics Team. The Development Economics Team leads projects and supports project teams across North America at scales that range from site-specific to metropolitan, and in settings from small rural communities to dense urban cores. We are closely connected to a set of Wisconsin based colleagues across many professional disciplines, and have worked with them on multiple projects in eastern Wisconsin in locations like Green Bay, Brillion, New Holstein, Beloit and Madison.

COMPANY INFORMATION

Consultant Name

Stantec Consulting Services Inc.

Year Established

1954

Type of Ownership

Corporation

Business Address(s)

733 Marquette Avenue, Suite 1000
Minneapolis, Minnesota 55402

Proposal Main Contact

Tom Leighton, AICP, EDFP
Project Manager

612-712-2154

tom.leighton@stantec.com

Please see the following pages for Tom's qualifications (page 15) and resume (page 16).

OUR HOUSING STUDY PRACTICE

Because the need is so pressing in communities across the country, Stantec has made a commitment to work with local communities on housing issues. That commitment is evident in the housing study we undertook for Wabasha, Minnesota—a community of 2,500 people—and the work we did for the Indianapolis Metropolitan Planning Organization—representing a population of over 2 million. That commitment has led us to invest time in methodological approaches to housing studies that make our studies more current and insightful in ways that we believe are industry leading.

We believe we provide a distinctive product and process in two specific areas.

- **Gap analysis.** As described in the work plan that follows, we have developed a computer-based machine learning methodology for estimating current market characteristics for the entire housing inventory of a community, and aligning that with the needs and financial capacity of the local population—yielding an absolutely current picture of what housing needs are generally being met and what needs are not.
- **Strategic guidance.** The value of this study is that it sets you up to meet local housing needs. That's why we have put a priority on the strategic elements of housing studies. We identify and assemble strategic actions for your consideration, and facilitate good discussions so you can digest those and prioritize what seems like a fit for your situation. Through doing this work, we've developed a deep library of best practices and case studies.

We believe these complementary strengths makes our work distinctive among firms that do housing study projects. And by leverage computer coding technologies in our initial data analysis, we gain efficiencies in those processes that allow us to maintain fees that are competitive with those that of other firms.



Our team has administered and written local zoning and subdivision regulations and we understand how they can shape or inhibit housing development.

Work Plan

The following details how we plan to execute this project based on our understanding of Neenah's context, challenges, and opportunities. We will work with you to refine the work plan as needed to best meet your goals and objectives for the project.

Task 1: Project Management and Coordination

1.1: KICK-OFF MEETING WITH CITY STAFF

We will launch the project with a kick-off meeting with City staff to review the scope and schedule in detail, confirm project goals and expectations, and plan the stakeholder outreach. We will also confirm project management protocols regarding communications, data exchanges, invoicing, etc.

1.2: SITE TOUR

An initial site tour is a critical step in getting familiar with the City of Neenah and your local housing context. We will arrange a site tour with City staff that could be scheduled at the same time as the kick-off meeting.

1.3: ONGOING COORDINATION WITH CITY STAFF

We will set recurring project management meetings with City staff at appropriate intervals such as bi-weekly. These meetings will occur virtually.

Task 2: Stakeholder Engagement

2.1: HOUSING STUDY COMMITTEE

When housing studies are intended to set the stage for strategic action, we recommend utilizing a steering

committee or advisory committee so that a contingent of stakeholders is informed about your housing context, and is exposed to some of the best practices in housing strategy. After the housing study is completed, committee members can be an important source of local support for taking action. Alternatively or additionally it can be helpful to share research and strategic options with the Common Council itself in work sessions or smaller meetings.

As desired, this proposal assumes up to three times with a local housing committee, and/or work sessions or briefings with the Common Council. We commonly will meet with the housing committee or attend Common Council work sessions three times during the process, first at the project kickoff, and then for workshop sessions after the research and analysis phase, and to discuss proposed housing solutions.

2.2: STAKEHOLDER AND DEVELOPER INTERVIEWS

We will use an extensive set of third-party data resources Stantec will work with City staff and the housing committee to identify additional stakeholders and people familiar with the local housing market. These meetings yield insights about housing market dynamics and inform us about housing-related programs or initiatives that are already in place. Stakeholders might include public officials, developers, property managers, housing advocates, neighborhood representatives, business owners, and other people familiar with local housing needs and market dynamics.

We will facilitate these conversations in focus group or individual interview format as appropriate. This proposal assumes an estimated one focus groups and ten individual

interviews.

2.3: PRESENTATION TO CITY COUNCIL

In addition to any Common Council engagement requested in the course of the study, key findings and recommendations of the final housing study deliverable will be presented to the Neenah Common Council at the conclusion of the study.

2.4: HOUSING SURVEY

Housing surveys can serve important purposes in a housing study. They can bring additional information to the table from the direct experience of local residents. They can educate members of the community about housing needs in a way that reduces stigma around certain housing types. And they can humanize the Neenah residents who have housing needs, helping people to see that it is their own neighbors that may be facing challenges. We have employed housing surveys in several housing studies, and it has yielded important and interesting findings. We will look forward to tailoring that to your needs and housing context.

Task 3: Demographic And Economic Analysis Of Residents And Workers

The demographic character of Neenah residents and the broader metropolitan area are important to understand because they bear on the demand for housing for people of different ages and income levels. Understanding the economic base of the City and region is important in projecting housing demand into the future

3.1: DEMAND DRIVERS

Stantec will analyze drivers of housing demand represented by population growth, employment growth, and demographic shifts.

3.2: POPULATION DEMOGRAPHICS

Stantec will analyze and describe the demographic characteristics of Neenah residential population with respect to characteristics such as:

- Age/life stages
- Household/family types
- Race/diversity
- Education
- Income
- Home values
- Tenure
- Housing cost burden

3.3: ECONOMIC BASE AND EMPLOYEE DEMOGRAPHICS

Stantec will describe Neenah's economic and job base— noting employment trends, industry mix, employment inflow/outflow, and demographic characteristics of people who work in Neenah.

Data Sources. Stantec will use various census products and proprietary data sources for the demographic and economic base analyses, including Decennial Census and American Community Survey (ACS) products, OnTheMap, LODS & LEHD data, ESRI Business Analyst, and Replica data.

Task 4: Housing Market Analysis

4.1: MARKET CONTEXT MAP

Stantec will build an illustrative map highlighting community assets and locational context features that would be relevant to and of interest to builders or developers considering housing development in Neenah.



↑ Tom and a colleague created the hands-on community engagement process called the "Corridor Housing Initiative," which has won national and local awards and recognitions.

The map may identify retail or storefront districts, major arterial roads or highways, major employers or employment districts, parks and recreational features, and schools.

The market context map is utilized in market research to orient prospective developers to the location and community assets of Neenah. It has ongoing value after the completion of the housing study for developer recruitment.

4.2: DEVELOPMENT TRENDS

Through building permit data, Costar information, rental licensing information (if available), and information from City staff, Stantec will collect information relevant to the development and preservation of new housing over the last decade. We will illustrate the trendline of housing development by housing types, and project that into the future.

4.3: MARKET DYNAMICS

Rental rates and vacancy levels are market demand indicators for rental housing. Sale prices are market demand indicators for ownership housing. Stantec will analyze these data and others. We will build our understanding of the dynamics of housing development, and the potential for attracting various types of new multifamily housing to Neenah, through research interviews with developers that have worked in Neenah or nearby communities.

Data Sources: Stantec will use local building permit records, Costar data, assessor records, and rental licensing information (if available)—supplemented with local knowledge and research interviews—to characterize development trends and market dynamics in the rental housing market.

Task 5: Housing Inventory

5.1: HOUSING INVENTORY ANALYSIS

Neenah's existing housing inventory will be analyzed through a series of maps and tables to understand the range and number of housing options that already exist in Neenah. Maps will highlight types of housing, including senior housing developments, affordable housing developments, housing by a decade of development, and if the data exists, housing conditions.

We will seek to provide a complete tabular inventory of all the multifamily housing of ten or more units that are existing or under development, paying particular attention to any age-restricted senior housing and rent-restricted affordable housing. This property will include distinguishing characteristics such as rents, vacancies, and amenities.

Data Sources: Stantec will use two primary information sources for the Housing Analysis.

1. City or County parcel data
2. Costar—a development market information base with national coverage

These data sources will be supplemented by local community knowledge to fill in the information gaps.

Task 6: Housing Gap Analysis

6.1: HOUSING GAP ANALYSIS BY TENURE, TYPE, SIZE AND AFFORDABILITY

Stantec has developed a cutting edge housing gap analysis that to our knowledge is unique in the industry—the purpose of which is to provide a much more detailed understanding of the alignment between Neenah's population and its existing housing stock. In brief, we use computer modeling and all available current housing market data to estimate values, bedroom counts, and rent rates for every residential property in Neenah's housing inventory. We use a different set of information sources to categorize Neenah's current household makeup by the size and cost of housing they need.

When we align those two analyses, we have absolutely up-to-date and detailed information about the types of housing that are abundant and that are lacking, thus illuminating our understanding of local housing needs across those parameters.

6.2: QUALITATIVE CONSIDERATIONS

In addition to the detailed housing gap analysis described above, we will summarize what we've learned about housing needs through other aspects of the analysis, including the stakeholder interviews. We will describe Neenah subpopulations that have housing needs, such as residents in particular life stages, or workforce households needed to support area employers.

6.3: FORECAST OF HOUSING NEEDS

Based on what is learned above, we will forecast the housing needs in Neenah for the upcoming five to ten years by housing type and affordability for both ownership and rental housing. We will also estimate and forecast demand for senior housing development.

ENGAGEMENT- ANALYTICAL PHASE

We like to pause and digest the findings from the preceding analysis with our clients at the conclusion of the analytical phase, or in installments along the way. The conclusion of the analytical phase is also an idea time to present what we've learned to a housing committee or Common Council in a workshop format for discussion and feedback.

Feedback received in these discussions will lead to refining the analysis.

Task 7: Housing Strategies and Action Plan

Stantec puts a great emphasis on the part of a housing study that focuses on the opportunities for undertaking strategic action to meet local housing needs. We have deep expertise in identifying best practices and developing innovative solutions—and in facilitating constructive

conversations with staff and decision makers about those strategic opportunities.

7.1: DRAFT REPORT FOR REVIEW

Based on our analytical findings and identification of housing needs, as well as input from City staff and housing committee members, we will develop a menu of candidate strategies for consideration—and we will associate those strategies with case studies or best practices from other locations where possible. Strategies may span a broad spectrum of housing development and preservation actions, including:

- Regulatory strategies, such as modifications to land use, zoning requirements, or other regulations
- Incentives programs, financial or otherwise
- Partnership approaches
- Property ownership strategies
- Context building actions that increase the attractiveness of the city or parts of the city for new development
- Site preparation and positioning

For each strategy, we will describe it and the need it is intended to address, note any related programs or practices that are already being done in Neenah, identify resources required for implementation, and provide one or more case studies or best practices.

Stantec has an existing Housing Solutions Library, assembled from our previous housing study work, that will be the source of some candidate housing strategies. Strategies will also originate from the suggestions of Neenah staff and Housing Committee members. All of these strategies will be explored and customized to the Neenah context through additional research interviews.

ENGAGEMENT- HOUSING STRATEGIES PHASE

At the completion of Task 7, we will present a robust menu of candidate strategies for you to consider, focused on addressing some of the identified needs of the Neenah community. This can be structured as a presentation/workshop with a Housing Committee and/or Common Council.

Feedback received in these discussions will provide guidance for refining the strategies.

Task 8: HOUSING STUDY DOCUMENT

8.1: DRAFT REPORT FOR REVIEW

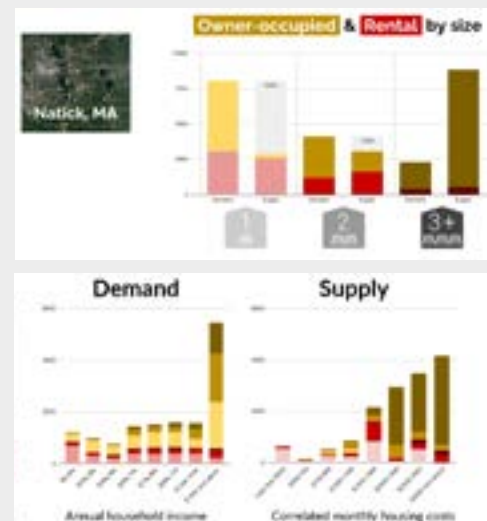
strategies in a visually appealing draft Housing Study document for review and comment by City staff and housing committee members.

8.2: FINAL REPORT

After collecting feedback and vetting feedback as needed with City staff, we will make revisions and issue a final report for official submittal and approval.

Our needs assessment methodology utilizes newly available, big data sources to construct a comprehensive model of the local housing demand and supply that is more detailed, accurate, and up to date than conventional approaches.

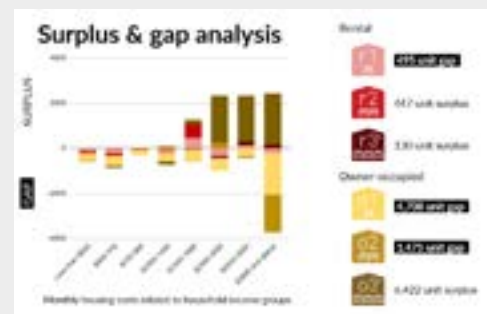
This methodology illuminates housing needs and opportunities with unprecedented clarity across the income spectrum and range of housing typologies. Incorporating recent local and regional migration and housing development trends, we can also project where gaps may narrow or widen in the coming years as well as where opportunities may exist for new development despite gaps in other areas.



Example housing demand and supply by affordability, tenure, and size

The example graph below highlights shortages and surpluses across housing types and costs (housing gap by monthly cost, tenure, and bedroom count).

Readings below the line indicate housing that is under supplied relative to the community's existing needs; readings above the line indicate housing that is adequately or oversupplied.



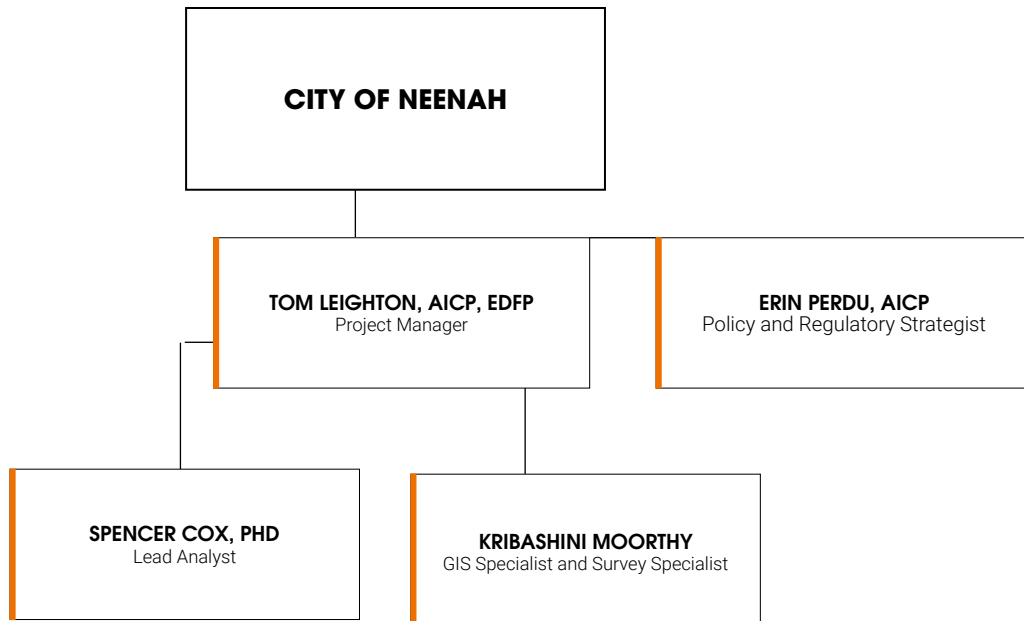
- o3 = Owner-occupied 3+ bedroom units
- r2 = Renter-occupied 2 bedroom units
- r3 = Renter-occupied 3+ bedroom units
- o1 = Owner-occupied 1 bedroom units
- o2 = Owner-occupied 2 bedroom units
- r1 = Renter-occupied 1 bedroom units

B. Schedule/Timeline

MONTH	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	
PHASE	Kickoff	Analysis			Strategies	Document
Task 1: Project Management and Coordination						
1.1 KICK-OFF MEETING WITH CITY STAFF	■					
1.2 SITE TOUR		■				
1.3 ONGOING COORDINATION WITH CITY STAFF		■	■	■	■	
Task 2: Stakeholder Engagement						
2.1 HOUSING STUDY COMMITTEE			■			
2.2 STAKEHOLDER AND DEVELOPER INTERVIEWS		■	■	■		
2.3 PRESENTATION TO CITY COUNCIL					■	
2.4 HOUSING SURVEY			■	■		
Task 3: Demographic and Economic Analysis						
3.1 DEMAND DRIVERS		■	■	■		
3.2 POPULATION DEMOGRAPHICS		■	■	■		
3.3 ECONOMIC BASE AND EMPLOYEE DEMOGRAPHICS		■	■	■		
Task 4: Housing Market Analysis						
4.1 MARKET CONTEXT MAP		■	■	■		
4.2 DEVELOPMENT TRENDS		■	■	■		
4.2 MARKET DYNAMICS		■	■	■		
Task 5: Housing Inventory						
5.1 HOUSING INVENTORY ANALYSIS		■	■	■		
Task 6: Housing Gap Analysis						
6.1 HOUSING GAPS BY TENURE, TYPE, SIZE, AND AFFORDABILITY				■		
6.2 QUALITATIVE HOUSING GAP CONSIDERATIONS				■		
6.3 HOUSING NEEDS FORECAST				■		
Task 7: Housing Strategies and Action Plan						
7.1 HOUSING STRATEGIES				■	■	
Task 8: Housing Study Document						
8.1 DRAFT REPORT FOR REVIEW					■	
8.2 FINAL REPORT					■	

C. Key Personnel and Organizational Chart

A brief introduction to each of our team members and resumes have been provided on the following pages.



Our Team

Our multidisciplinary team will be led by Tom Leighton, who brings deep experience in managing housing studies for communities across our region. In addition to his role as project manager for our team, Tom is co-leader of Stantec’s Development Economics team, which provides market analysis, development intelligence, and implementation strategies in support of projects across North America.

In addition to Tom’s expertise, our team includes professionals who bring a diverse set of experience to this study, including specialized expertise in the areas of housing gaps analysis, mapping, data analysis and policy and zoning experts..

PROJECT MANAGER QUALIFICATIONS

Tom Leighton, an urban planner and economic development specialist, has been leading implementation-oriented planning and community development projects across the country for over twenty years. His experience encompasses dozens of projects that include housing-related market analysis or housing strategies since 2015—key examples of which are highlighted in this proposal. He is an expert in a broad spectrum of market research and development analysis, with the facilitation and communication skills that help decision-makers, stakeholders, and community members. This proactive communication approach contributes to a meaningful sense of the housing market, an understanding of key housing issues, and a platform for strategy development and policy decisions.

KEY PERSONNEL RESUMES



TOM LEIGHTON, AICP, EDFFP
PROJECT MANAGER AND
HOUSING STRATEGIES LEAD

YEARS OF EXPERIENCE: 24

EDUCATION

Master in Design Studies (MDesS) in Real Estate and the Built Environment, Harvard University Graduate School of Design, Cambridge, Massachusetts

Master of Arts (MA) in Public Affairs, University of Minnesota Humphrey School, Minneapolis, Minnesota

Bachelor of Arts in Natural Science, St. John's University, Collegeville, Minnesota

REGISTRATIONS

Certified Planner #018262, American Institute of Certified Planners

Economic Development Finance Professional #1216-024, National Development Council

RELEVANT EXPERIENCE

Minot Housing Needs and Market Study |Minot, ND | Project Manager/Analytical Leader

Tom acted as the project manager and analytical leader for the Minot Housing Needs and Market Study for analyzing the housing stock and its ability to meet local needs, building resiliency in that product to external economic and natural events,. Tom led the team to explore and recommend housing strategies for meeting local needs and weathering future economic shocks.

New Brighton | New Brighton, MN | Project Manager/Analytical Leader

Tom acted as the project manager and analytical leader for the New Brighton Housing Study. New Brighton contracted Stantec to study the housing inventory and market, identify housing gaps and suggest strategies the City could pursue to attract more housing production across various housing formats.

Brillians Work Redevelopment Plan |Brillion, WI | Project Manager

The once economic anchor of City of Brillion with an iron foundry and manufacturing activity and powerhouse, became obsolete over time warranting redevelopment owing to its central location. Stantec was selected to create a development vision for the site. Tom served as the project manager for redevelopment of master planning process, led the reseach and market analysis for prospective residential, retail and industrial development on the site resulting in a redevelopment plan.

Beloit Area Communities Housing Demand Analysis | Beloit, WI | Project Manager/ Chief Analyst

Tom served as project manager and chief analyst. The project employed demographic research, market demand analysis, forecasting, and other analytical methodologies—as well as structured interviews with area housing developers—to arrive at estimated levels of demand for different housing types.

Revitalizing South Commercial Street| Neenah, WI | Chief Analyst

Neenah's South Commercial Street was an aging mixed commercial corridor resulting in blight and disinvestment. The City of Neenah hired Stantec to create a plan for the same, to identify offer proactive strategies for redevelopment. Tom provided research and analysis to understand market and development conditions for the area – in the residential, office and retail sectors along with development opportunity analysis to identify sites along the corridor where redevelopment would be both feasible and impactful, for attracting additional development and business and residential investment.

Housing Development Projects | Minneapolis, MN, Marshall, MN, Willmar, MN, and Watertown, SD | Market Analyst

Tom has had numerous opportunities to support developers with housing and mixed-use projects in roles that range from providing specific services—such as market analysis, entitlements, or proforma development—to overall project management. Recent projects include the following.

- In 2017 he supported a local first-time developer in developing a mixed use housing project on a property he owned on Lake Street in South Minneapolis.*
- In 2018-2019, Tom served as the local project manager for an experienced San Francisco based developer on two ambitious upscale apartment developments, both in Northeast Minneapolis. One included office and retail components.*
- In 2020-2021, Tom supported a greater Minnesota based developer with a set of workforce apartment buildings in Marshall, Willmar, and Watertown, South Dakota.

Tom provided proforma, market analysis and grant pursuit services to a based first-time developer who is working to redevelop his property in Minneapolis.



ERIN PERDU, AICP
POLICY AND REGULATORY STRATEGIST

YEARS OF EXPERIENCE: 26

EDUCATION

Master of Urban and Regional Planning, University of Michigan, Michigan

Master of Science, Natural Resources, University of Michigan, Michigan

Bachelor of Science, Earth Systems, Stanford University, California

REGISTRATIONS

Certified Planner #015898

RELEVANT EXPERIENCE

Zoning Diagnosis and Ordinance Revisions | Mahtomedi and North St. Paul, MN

Erin leads zoning updates for her zoning administration clients, most recently in Mahtomedi and North St. Paul, Minnesota. Those updates included a diagnosis and overhaul of ordinances as they align with Comprehensive Plan goals, including those related to housing needs and affordability. Specific ordinance revisions related to housing.

Unified Development Ordinance | Town of Holly Springs, NC

Erin served as project manager and lead author of a new Unified Development Ordinance which included zoning and subdivision regulations. The new code was designed to be heavily graphic, easy to use, and greatly streamlined from the previous version. Erin and the Stantec team drafted regulations in line with the Town's recently adopted Land Use and Character Plan, including: districts that allowed a wider variety of housing types; increased densities in several districts; site design standards that make sure mixed use is developed with pedestrians and quality-of-life in mind. To encourage development in accordance with the city's vision, the new UDO also includes a greatly streamlined review process for reviewing land use and development applications, particularly those that follow UDO standards.



SPENCER COX, PHD
LEAD ANALYST

YEARS OF EXPERIENCE: 7

EDUCATION

PhD, University of Minnesota/ Department of Geography, Environment and Society, Twin Cities, Minnesota

Bachelor of Arts, Economics and Environmental Studies, Middlebury College, Middlebury, Vermont

RELEVANT EXPERIENCE

Minot Housing Gap Analysis | Minot, ND | Housing Data Analyst

Collected, analyzed, and visualized data on economic development drivers, demographic changes, and housing market indicators to understand housing gaps in Minot, ND. Applied innovative big data and machine learning techniques to model supply and demand to understand precise housing gaps now and over the next 10 years.

Mesquite Housing Gap Analysis | Mesquite, TX | Housing Data Analyst

Gathered, analyzed, and visualized data on economic development drivers, demographic changes, and housing market indicators for the City of Mesquite, Texas. Applied an innovative machine learning model to predict rents and home values, thereby creating market-leading detail on housing supply in the region. Analysis identified major housing gaps for the city at different price points and housing market types and created a portfolio of strategies to induce needed development.

NKADD Housing Gap Analysis | Northern Kentucky | Housing Data Analyst

Worked with team to develop novel methodologies to clean, analyze, and visualize complex housing and demographic data. Leveraged statistical models of real-time rents to produce a rent and bedroom size estimate for the designated study region. Created interactive data visualizations and data dashboards for client. Automated housing gap methodologies using Python scripting, increasing analytical efficiency.

MPO Housing Gap Analysis | Indianapolis, IN | Housing Data Scientist

Applied innovative methodologies to predict real-time housing supply and demand by housing tenure, income, and housing cost using big-data analytic techniques. Communicated housing gap information through interactive visualizations that give deep insight into real-time housing needs. This analysis is central to providing a snapshot of the current housing market that goes beyond public surveys.



YEARS OF EXPERIENCE: 2

EDUCATION

Master of Urban and Regional Planning, University of Minnesota, Minnesota

Master of Engineering in Remote Sensing and GIS, Anna University, Chennai, India

Bachelor in Civil Engineering, Anna University, Chennai, India

RELEVANT EXPERIENCE

Owatonna Comprehensive Plan | Owatonna, MN | Data Support

Assisted the team with summarizing existing conditions and participating in community engagement events along with analysis of engagement surveys.

Metropolitan Council SWLRT Development Impact Analysis | Research Support

Kribashini collaborated with colleagues, cities, and Metropolitan Council staff to analyze the impacts of the Southwest Light Rail Transit project construction and land acquisitions on several properties along the project corridor. The analysis compared properties in the before, during construction, and after acquisition conditions for land use impacts such as zoning and building requirements, overall property function, access, parking, loading, and any issues unique to each property identified along the way. Kribashini assisted creating the reports for each property that are used in legal proceedings.

Safe Routes to School, Cheyenne | Cheyenne, WY | GIS Analyst

Kribashini leads the GIS to create maps for Safe Routes to School in Cheyenne Wyoming. This involves analyzing the existing conditions and mapping the proposed improvements for all the schools in Cheyenne Metropolitan Area.

MnDOT Corridor Context Guides | MN | Data Analyst

Analyzed transportation corridors throughout the Twin Cities Metro area. Performed Demographic analysis to identify future opportunities and constraints beyond the transportation infrastructure that may need to be targeted priorities for corridor reconstruction from an equity perspective.

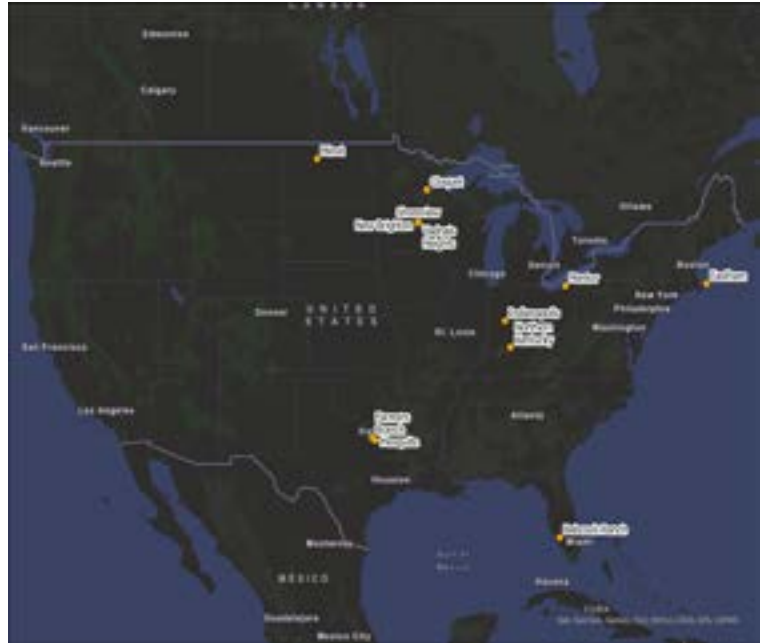
D. SIMILAR PROJECT EXPERIENCE

RECENT PROJECTS

In recent years our team has been immersed in housing-related market analysis and strategic problem-solving. As an example, we have recently concluded, or are currently involved in, several projects that demonstrate our strength in both small cities and larger regions. These communities include:

- Minot Housing Study (North Dakota)
- Central Indiana Housing Study (Indianapolis metropolitan area, IN)
- Cloquet Housing Study Cloquet, MN)
- Northern Kentucky Regional Housing Study (8 Northern KY rural counties)
- Beloit Housing Demand Analysis (Beloit, WI, region)
- Wabasha Housing Study (Wabasha, MN)
- Janesville Housing Study (Janesville, MN)
- New Brighton Housing Study (New Brighton, MN)
- Shoreview Housing Study (Shoreview, MN)
- Farmers Branch Housing Study (Farmers Branch, TX, as part of the comprehensive plan contract)

Having experience working with both public agencies as well as private developers, we understand housing issues from multiple perspectives.



The map shows the recent housing projects that are done and are currently being done.



Value: \$10,000
Year Completed: 2022
Key Personnel: Tom Leighton

BELOIT AREA COMMUNITIES HOUSING DEMAND ANALYSIS

Beloit, Wisconsin

The City of Beloit and surrounding municipalities are home to a diverse and growing business community, but the supply of housing is not keeping pace with business growth. New employees at both the workforce and executive levels are having trouble finding a home or apartment.

Stantec was contracted to build an understanding of housing needs, analyze the ways the recent housing development is and is not meeting that demand, and provide housing demand forecasts.

Tom served as project manager and chief analyst. The project employed demographic research, market demand analysis, forecasting, and other analytical methodologies—as well as structured interviews with area housing developers—to arrive at estimated levels of demand for different housing types.



Value: \$145,000
Year Completed: 2024
Key Personnel: Tom Leighton

MINOT HOUSING STUDY

Minot, North Dakota

Minot's housing market has been heavily impacted by exterior forces. The floods of 2011 demolished 25% of its single family stock in some of the most affordable neighborhoods in the City. The oil boom stimulated tremendous housing growth from 2009 to 2014, and the subsequent wave of outmigration resulted in slow absorption of those housing units until just the last few years. A further wave of workers will be coming to Minot in the next five or ten years to execute the upgrade of the nuclear missile silos distributed around the county.

Stantec was hired to analyze the housing stock and its ability to meet local needs, building resiliency in that product to external economic and natural events, and propose strategies for meeting local needs and weathering future economic shocks. Tom served as the project manager for the project. The research and analysis phase of the project is complete and the team prepared a range of strategies for creating and preserving the housing that addresses local needs.



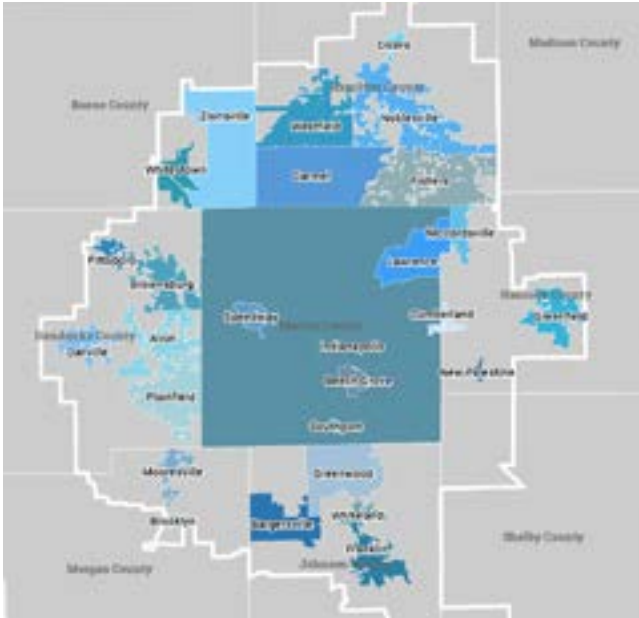
Value: \$35,000
Year Completed: 2023
Key Personnel: Tom Leighton

NEW BRIGHTON HOUSING STUDY

New Brighton, Minnesota

As a fully developed suburb on the north side of the Twin Cities, New Brighton offers a broad mix of housing types, and yet faces challenges associated with its aging single-family homes and a concentration of 1960s-era apartment buildings. New multifamily development is desired, particularly affordable options for its community and workforce.

The Stantec team was hired to complete a housing study and develop a detailed understanding of New Brighton's housing inventory, its market and development context, the housing opportunities and challenges, and housing needs. Tom led the team to explore and recommend housing strategies that would advance housing goals and meet community needs. The project employed market research, mapping analysis, and other analytical methodologies. Structured interviews were conducted with developers familiar with the City to understand the viability of different housing formats in New Brighton, and how to improve development outcomes.



CENTRAL INDIANA HOUSING STUDY

Indianapolis, Indiana

Stantec is performing a regional housing study to help the IMPO understand the market and socioeconomic forces driving regional housing trends and disparities; identify housing gaps across the affordability spectrum; and develop a toolkit to help communities expand housing access and equity at local and regional levels. The process includes a robust series of stakeholder meetings, including recurring touchpoints with all the IMPO's 36 member communities to help them not only address housing issues and opportunities locally but also compare notes and collaborate with each other.

To complete the gap analysis, Stantec is processing a unique combination of public and proprietary data with cutting-edge data science techniques to create an unprecedentedly accurate, detailed, and up-to-date picture of both housing supply and demand across the region.

Value: \$205,000

Year Completed: 2023

Key Personnel: Jeff Sauser, Tom Leighton, and Spencer Cox

SHOREVIEW HOUSING STUDY

Shoreview, Minnesota



Shoreview is a fully developed suburb north of St. Paul. Its natural amenities and strong schools make it an attractive location for new housing development.

It is starting to see development of high-end apartment buildings, and that has raised questions about other housing needs in the community that are not being met.

Stantec was hired to undertake a housing study to develop a detailed understanding of the City's housing inventory, its market and development context, its housing opportunities and challenges, and its housing needs, and utilize that information to sharpen the City's housing strategies and programs to advance housing goals and meet community needs.

Tom served as the project manager and primary researcher for the project. The project employed market research, mapping analysis, and other analytical methodologies. Structured interviews were conducted with housing developers familiar with Shoreview to understand their perceptions of the Shoreview

Value: \$28,000

Year Completed: 2022

Key Personnel: Tom Leighton and Kristin Baldonado



Value: \$150,000

Year Completed: 2013-2022

Key Personnel: Tom Leighton (*prior to joining Stantec*)

HOUSING DEVELOPMENT PROJECTS

Minneapolis, Marshall, and Willmar, Minnesota and Watertown, South Dakota

Tom has had numerous opportunities to support developers with housing and mixed-use projects in roles that range from providing specific services—such as market analysis, entitlements, or proforma development—to overall project management. Recent projects include the following.

- In 2017 he supported a local first-time developer in developing a mixed use housing project on a property he owned on Lake Street in South Minneapolis.*
- In 2018-2019, Tom served as the local project manager for an experienced San Francisco based developer on two ambitious upscale apartment developments, both in Northeast Minneapolis. One included office and retail components.*
- In 2020-2021, Tom supported a greater Minnesota based developer with a set of workforce apartment buildings in Marshall, Willmar, and Watertown, South Dakota.

Tom provided proforma, market analysis and grant pursuit services to a based first-time developer who is working to redevelop his property in Minneapolis.

E. Other Information

Proposed use of City staff as well as any equipment, materials or additional data that will be expected from the city at the onset of the project.

We have all technical competencies and graphic/document capabilities in house. Your support in organizing meetings and connecting us with stakeholders will be much appreciated. And we will make an information request to you at the beginning of the process, and would look to you to provide as much of that information as you can.

Agreement to accomplish the project within the time frame contained in this RFP.

We are committed to meeting your project timeline expectations for this project.

Estimated cost of the services to be provided under this proposal.

The proposed fee for this project is \$40,000.

Proposed services to be sub-contracted if any, anticipated subcontractors, and anticipated costs for these services

Our proposal team doesn't include any subconsultants.

Any additional terms or conditions, which are deemed necessary for entering into a contract with the City, should be attached or incorporated as part of the proposal

No additional terms or conditions are proposed.



Design with
community in mind