CITY OF APPLETON

HOUSING DEVELOPMENT POLICY GUIDE

MARCH | 2024

GREEN BICYCLE CO.
Building conscious communities

ACKNOWLEDGEMENTS

Green Bicycle Co. is proud to have had the opportunity to prepare this Housing Development Policy Guide in partnership with the City of Appleton, with input, guidance and collaboration from City of Appleton Community and Economic Development Department staff, Mayor Jake Woodford, and members of the Mayor's Taskforce on Housing Development Policy.

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EXECUTIVE SUMMARY

Green Bicycle Co. conducted a review of City of Appleton housing-centric policy materials and facilitated engagement activities with key internal and external stakeholders to identify opportunities for refinement and improvement of City of Appleton housing-centric policies, processes and communication to reduce barriers to housing-centric development and encourage near-term and long-term housing-centric investment in the community. Together with Community and Economic Dept. staff and the Mayor's Taskforce on Housing Development Policy, the following eighteen recommendations were formed:

THEME		RECOMMENDATIONS
01 | Vision	Create a community vision that acknowledges the need for housing-centric development and investment and form policy that supports it.	01.1 Identify target areas or corridors for housing development and leverage policy and actionable steps to increase investment. 01.2 Utilize a regional perspective in developing and implementing housing-centric policy. 01.3 Communicate future housing density intention to support internal decision making.
02 | Process	Encourage a positive development approval experience for housing-centric projects.	02.1 Create a project point of entry and entitlement flow chart for housing-centric projects. 02.2 Audit of policy, process-related and published materials to ensure alignment and consistency. 02.3 Inventory and assess accessibility of policy, process-related and published materials. 02.4 Consider the opportunity to further define the role of case manager within CED to facilitate the entitlement process. 02.5 Better utilize existing technology across departments to improve efficiencies. 02.6 Prepare for future technology/software upgrades by formalizing processes and procedures. 02.7 Evaluate current internal meeting processes and their efficacy.
03 | Activation	Encourage activation of existing housing-centric policy.	03.1 Create standard operating procedures for existing housing-centric policies. 03.2 Evaluate the implementation and/or market impact potential during new policy development.
04 | Proactiveness	Encourage a proactive approach to catalyzing housing-centric development and investment.	04.1 Leverage existing resources and organizations to incentivize housing development. 04.2 Advocate to expand existing State funding opportunities. 04.3 Evaluate capacity, ability, and desire to utilize tax increment financing to incentivize housing development. 04.4 Create an inventory of funding opportunities and develop a utilization program.
05 | Communication	Proactively engage with the community to better communicate changes to housing-centric policies and processes.	05.1 Regularly provide opportunities for staff to engage with elected and appointed officials to increase understanding of housing-centric policies and processes. 05.2 Actively market pro-housing policy changes to the community.

The Areas of Focus section features examples of how specific recommendations can be activated through additional evaluation of an idea or concept, or the creation of informational tools, to assist the City in supporting housing-centric development.

Lastly, an Innovative Guide Element was created, which addresses the potential for repositioning Public Institutional sites for future housing (re)development opportunities.

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ABOUT

In the fall of 2023, Green Bicycle Co. partnered with the City of Appleton to develop a Housing Development Policy Guide. The Guide focuses on recommendations to the City based on stakeholder feedback and seeks to identify ways to improve policies, processes, and communication to support housing-centric development and investment in the community.

A market study completed for the City of Appleton ("City") in 2022, as part of the College North Neighborhood Plan by RDG Planning & Design, demonstrated that the City would need to deliver approximately 3,000 new housing units between 2020 and 2030, or approximately 300 units annually, to accommodate the current needs of the community and its projected future growth. Per the City of Appleton 2022 Growth Report, there were 179 housing units delivered that year. The gap in the number of housing units needed to meet current and future demand and the units being delivered is representative of the larger housing shortage and affordability issues being experienced by communities locally, regionally, and nationally.

In collaboration with Community and Economic Development Department ("CED") staff and members of the Mayor's Taskforce on Housing Development Policy ("Taskforce"), Green Bicycle Co. ("GBC") focused its initial efforts on reviewing housing-centric municipal policy and process related materials and facilitating a variety of stakeholder engagement activities. GBC and the City sought to identify potential barriers to housing-centric development and investment based on an understanding of current policy and market conditions, as well as the feedback gathered from internal and external stakeholders.

The result is a Guide that includes eighteen recommendations organized under the umbrella themes of vision, process, activation, proactiveness and communication. The Areas of Focus section features examples of how specific recommendations can be activated through additional evaluation of an idea or concept, or the creation of informational tools, to assist the City in supporting housing-centric development. Lastly, an Innovative Guide Element was created, which addresses the potential for repositioning public-institutional sites for future housing (re)development opportunities.

APPROACH

The development of the Guide required GBC to utilize a collaborative approach by leveraging the networks and expertise of CED staff and Taskforce members to, 1) encourage exceptional stakeholder participation and feedback, and 2)craft effective recommendations to improve City policies, processes and communication as it relates to housing-centric development. The consistent meeting structure and communication between GBC, CED staff and Taskforce members throughout the project resulted in the creation of useful and relevant Guide elements.

Municipal Policy + Process Review

Review of housing-centric reports, relevant comprehensive plan chapters and materials, standard operating procedures, ordinances and applications/review process forms.

Stakeholder Engagement Plan

Establish key internal (municipal staff) and external (housing market experts and community leaders) stakeholder list and engagement plan.

See Appendix A for the Stakeholder Engagement Plan.

Stakeholder Engagement Activities

Conduct surveys, interviews, focus group meetings with internal and external stakeholders.

Summary of Findings + Draft Recommendations

Organize and evaluate stakeholder feedback. Create draft recommendations based on municipal policy and process review and summary of findings.

See Appendix B for the Summary of Findings.

Final Recommendations, Areas of Focus + Innovative Guide Element

Refine draft recommendations into final recommendations based on CED staff and Taskforce input. Create examples of actionable exercises and tools to demonstrate activation of the Guide recommendations.

RECOMMENDATIONS

Feedback from internal and external stakeholders was consolidated, evaluated, organized and taken into consideration with the information gleaned from the municipal policy and process review efforts to craft final recommendations.

It is the intent of these recommendations to assist the City in positioning itself to capture near term and long term housing-centric investments to support the growth of the community.

Stakeholder Survey Highlight

Top 4 noted barriers to development:

- Project Costs
- Approval Process
- Land Availability
- Community Push-back (NIMBY)

VISION.

THEME | 01

Create a community vision that acknowledges the need for housing-centric development and investment and form policy that supports it.

The City has demonstrated its ability to leverage planning efforts to develop new housing-centric policy. As part of future comprehensive planning initiatives, the City should encourage the creation of a community vision that acknowledges the need to support higher density, housing-centric development and ensure subsequent recommendations align with the community's housing-centric needs and goals, as well as market opportunities.

Stakeholder Feedback

"Identify opportunities for density and update future land use and zoning"

"Market rate product at a saturation point [with respect to] higher end apartments "

"To advance mixed use development, advocate to update the [...] Housing Tax Credit Funding"

The Housing Tax Credit, or HTC, is a dollar-for-dollar reduction of federal income taxes owed by owners/investors in qualified projects for tenants whose incomes are at or below 60% of County Median Income (CMI), administered by WHEDA.

RECOMMENDATIONS

THEME | 01

01.1 Identify target areas or corridors for housing development and leverage policy and actionable steps to increase investment.

AREA OF FOCUS

Establish areas or corridors of desired investment that align with the housing vision. Encourage housing development by aligning policy mechanisms (e.g. comprehensive plan, future land use map, corridor plans and zoning ordinances) to bolster support of projects during the review and approval process.

01.2 Utilize a regional perspective in developing and implementing housing-centric policy.

Evaluate opportunities for housing-centric development that the City is uniquely positioned to capture, to meet the needs of the housing market that are going unmet in the region. Consider opportunities to encourage and provide support to higher density housing development, as well as in-fill and redevelopment opportunities.

01.3 Communicate future housing density intention to support internal decision making.

Prioritize interdepartmental collaboration in the creation of new housing-centric policy, to better evaluate, understand and accommodate higher-density land uses as it relates to infrastructure capacity, emergency services, etc., to support housing development.

PROCESS.

THEME | 02

Encourage a positive development approval experience for housing-centric projects.

The City, through adjustments to various internal processes, can better position itself to encourage housing-centric development by instituting a culture of collaboration and problem solving to demonstrate to potential investors (e.g. local, regional, and national developers) that the appropriate communication, policy, and process measures are in place to facilitate a transparent, timely and successful review and approval of housing-centric projects.

Stakeholder Survey Highlight

- About 30% of respondents agreed (yes) that resources, forms and communication were accessible and adequate for their housing-centric project needs
- Specific commentary varied but communication-centric feedback was noteworthy and included:
  - Improve interdepartmental communication & review coordination
  - Establish clear expectations between staff/review consultant & developer
  - Establish communication hierarchy

RECOMMENDATIONS

THEME | 02

02.1

Create a project point of entry and entitlement flow chart for housing-centric projects.

AREA OF FOCUS

Establish clear processes for the review and approval of all housing-centric projects to ensure transparency and consistency from project to project. Creating flow charts that illustrate these processes (i.e. contacts, timing and requirements) and making them available to the community reinforce expectations for both internal and external stakeholders.

02.2

Audit of policy, process-related and published materials to ensure alignment and consistency.

Review policies (ordinances, plans, etc.), administrative rules (non-published, internal policies), standard operating procedures, and published guide materials to ensure consistency, as well as identify potential conflicts and misalignments. An on-going audit program will aid in supporting the effort to maintain consistent policy interpretation and enforcement, which can result in accelerated approval schedules for housing-centric projects.

02.3

Inventory and assess accessibility of policy, process-related and published materials.

Ensure that policy, administrative rules, standard operating procedures and published guide materials for housing-centric projects are up-to-date and are accessible to internal and external stakeholders. In circumstances where publishing information on a public platform is not preferred, ensure the materials and/or necessary information is readily accessible to internal stakeholders and can be effectively communicated to external stakeholders when inquired upon.

02.4 Consider the opportunity to further define the role of case manager within CED to facilitate the entitlement process.

Evaluate the opportunity to elevate and further define the role of case manager within the Community and Economic Development Department to better facilitate the entitlement process for housing-centric projects. The case manager role would require the individual to work with staff of all departments involved in the project entitlement process to ensure consistent standards of policy interpretation, enforcement, and communication.

02.5 Better utilize existing technology across departments to improve efficiencies.

Provide new and current employees with educational training and resources on how to utilize current technology. Understanding how each department involved in the review and approval of a housing-centric project utilizes technology and information sharing resources, and establishing a streamlined process, will allow for greater access to relevant, up-to-date information and materials and for those materials to be accessed interdepartmentally.

02.6 Prepare for future technology/software upgrades by formalizing processes and procedures.

Develop a staff training program for future software integration, to ensure efficiencies related to materials and information access, management, and sharing. Software training opportunities will aid in facilitating a smooth integration of new technology platforms and its ability to be utilized to its full capacity and across departments.

02.7 Evaluate current internal meeting processes and their efficacy.

Assess the goals and objectives for current and future internal meetings related to the review and approval of housing-centric projects. Directors, or staff responsible for facilitating certain internal meetings, should evaluate if current meetings are achieving their intended goals and determine if the current meeting structure and those participating is the most efficient and effective means to achieving the goals of the meetings. Consider consolidating meetings with common projects or participants for efficiency.

ACTIVATION.

THEME | 03

Encourage activation of existing housing-centric policy.

The City has taken proactive steps to support the development of housing-centric projects through the completion of planning efforts and amendments to zoning ordinances. The City should take measures to ensure these policies are being utilized in the community by ensuring the goals, capabilities and implementation parameters are well understood by staff and effectively communicated internally and externally.

Stakeholder Interview Highlight

"Policy updates, like removing mandatory parking, removes the bureaucratic barrier, but the demand for parking still exists. It would be great to collaborate with the City for parking options."

RECOMMENDATIONS

THEME | 03

03.1 Create standard operating procedures for existing housing-centric policies.

AREA OF FOCUS

Establish a system for the creation of standard operating procedures and general approval flow charts to support the implementation of newly formed policy. Encourage interdepartmental collaboration and feedback to ensure the policy and associated procedures for review and approval of housing-centric projects are consistently interpreted and implemented and able to be shared with the community, when appropriate.

03.2 Evaluate the implementation and/or market impact potential during new policy development.

Assess the capacity in which new, or amended, policy is intended to affect housing-centric development during the policy creation process and establish timing and implementation goals to measure the policy's impact and effectiveness.

PROACTIVENESS.

THEME | 04

Encourage a proactive approach to catalyzing housing-centric development and investment.

The City possesses a variety of tools and programs that have been created to encourage housing development in the community. A proactive approach should be taken by the City to ensure individuals and organizations are aware of the benefits afforded by these tools and programs so they can be utilized to the fullest capacity to support housing-centric development.

Development and Housing Funding Opportunities

- 2023 Wisconsin Workforce Housing Loan Programs
  - Connect with WHEDA for guidance.
  - Act 15 - Main street housing rehabilitation revolving loan fund.
  - Act 14 - Residential housing infrastructure revolving loan fund and program.
  - Act 18 - Commercial-to-housing conversion revolving loan fund and loan program.
  - Act 17 - Housing rehabilitation loans. (City Promote)
- HOME-American Rescue Plan (City Collaborate)
  - HOME-ARP Rental Housing Development
  - HOME-ARP Nonprofit Operating and Capacity Building
  - HOME-ARP Supportive Services

RECOMMENDATIONS

THEME | 04

04.1 Leverage existing resources and organizations to incentivize housing development.

AREA OF FOCUS

Analyze programs and funding opportunities available to government agencies (e.g. City of Appleton) and consider how to partner with the private sector to utilize programs and funding resources to support or overcome barriers to housing-centric development.

04.2 Advocate to expand existing State funding opportunities.

Consider partnering with agency representatives to advocate for the expansion of various program implementation parameters to encourage the broader utilization of funding opportunities for housing-centric projects in the community.

04.3 Evaluate capacity, ability, and desire to utilize tax increment financing to incentivize housing development.

Assess the opportunities to integrate tax increment financing districts as a tool to support and incentive housing-centric development. Additionally, establish a plan to analyze existing tax increment districts to determine if the Affordable Housing TID Extension program would be available to support future affordable housing initiatives in the community.

04.4 Create an inventory of funding opportunities and develop a utilization program.

Create a consolidated inventory of current housing-centric funding opportunities available to the City and develop a plan to publish and market to the community and key stakeholders to encourage housing-centric development.

COMMUNICATION.

THEME | 05

Proactively engage with the community to better communicate changes to housing-centric policies and processes.

The City has identified the need for housing-centric development to support the near term and long term growth of the community. Strategic and on-going outreach efforts should be established to communicate with key stakeholders the actions (i.e. creation of new policy, evaluation of internal review and approval processes, refinement and accessibility of informational resources, etc.) being taken to support and encourage housing-centric development.

Stakeholder Survey Highlight

- Respondent awareness of recent changes in housing policy to encourage housing-centric development ranged from 20%-40%
- Preferred methods of staying informed of policy changes: City website and social media

RECOMMENDATIONS

THEME | 05

05.1 Regularly provide opportunities for staff to engage with elected and appointed officials to increase understanding of housing-centric policies and processes.

AREA OF FOCUS

Create a standard engagement program to allow elected and appointed officials to be better acquainted with housing- centric policy updates by including, but not limited to, a summary of the policy or initiative, how it is intended to impact housing-centric development in the community and how it is intended to be implemented in the community.

05.2 Actively market pro-housing policy changes to the community.

Create a marketing plan to effectively communicate key aspects of housing-centric policy and process changes to the community, to stimulate interest and encourage investment in housing-centric projects in the community.

AREAS OF FOCUS

The Areas of Focus section of this guide provides the City with an applicable representation of an exercise or tool, that is directly related to furthering a recommendation made from each theme in the previous section. An additional "Innovative Guide Element" was crafted in regards to the potential of repositioning public-institutional land uses for future housing-centric development.

THEME	AREA OF FOCUS
01	Evaluate the alignment of policies (e.g. comprehensive plan materials, future land use and zoning materials) to support housing-centric development along the Wisconsin Avenue Corridor.
02	Create a sample infographic that summarizes the subdivision plat process.
03	Create a sample infographic that summarizes what an accessory dwelling unit (ADU) is and the approval process.
04	Assess the Appleton Redevelopment Authority (ARA) and explore opportunities to activate and utilize its power/duties.
05	Create a presentation template for CED staff to utilize in communicating policy and/or process updates to decision-making bodies.
INNOVATIVE GUIDE ELEMENT	Evaluate the repositioning of sites designated Public Institutional for future housing opportunities, when appropriate.

THEME | 01

Create a community vision that acknowledges the need for housing-centric development and investment and form policy that supports it.

RECOMMENDATION | 01.1

Identify target areas or corridors for housing development and leverage policy and actionable steps to increase investment.

AREA OF FOCUS

Evaluate the alignment of policies (e.g. comprehensive plan materials, future land use and zoning materials) to support housing-centric development along the Wisconsin Avenue Corridor.

The policy-alignment exercise is a high level evaluation of how the current physical conditions along the Wisconsin Avenue Corridor and existing policy are potentially hindering housing-centric investment. The assessment and following considerations are intended to provide the City with opportunities to pursue alignment of vision and policy and activation through traditional planning methods, as well as an alternative approach through the introduction of a form-based code overlay.

WISCONSIN AVENUE CORRIDOR

Green Bicycle Co. recommends the City of Appleton seek to align policy, when possible, or introduce new policy to encourage the desired outcome of planning related activities and to bolster the development of, and investment in, housing-centric projects in strategic areas of the community like the Wisconsin Avenue Corridor.

Evaluation

There are several policy-related documents that influence the current and future planned land uses along the approximately one mile stretch of Wisconsin Avenue corridor between Richmond Street and Meade Street (the "Corridor"). GBC reviewed the following policy-related documents and evaluated their alignment with the City's interest in supporting housing-centric development in the Corridor.

POLICY	OBSERVATIONS
Comprehensive Plan 2010-2030	Housing is not included as a key component of the Community Vision.
Comp Plan, Chapter 5: Housing and Neighborhoods	The objectives of the chapter support the need for housing-centric development and investment.
Comp Plan, Chapter 15: Wisconsin Avenue Corridor Plan	The plan supports the development of housing-centric projects within the Corridor, specifically the area designated for Residential Mixed-Use.
Future Land Use Map	The map designates future Mixed-Use, which supports housing-centric development, but does not adequately address the need for transitional buffer areas from the Corridor to the immediately adjacent, lower-density residential areas.
Municipal Code, Chapter 23 Zoning	The majority of Corridor parcels are zoned C-2 General Commercial, which does not permit residential development as a standalone use.

Assessment

Although a portion of the Corridor is identified for mixed-use, housing-centric development as part of the Wisconsin Avenue Corridor Plan, and the Future Land Use Map reflects a Mixed-Use designation for the entire Corridor, the current commercial zoning does not support or permit standalone residential uses outlined in the Corridor Plan.

Assessment (cont'd)

Additionally, the small lot sizes, lack of common ownership, and immediate adjacency of the Corridor to neighborhoods dominated by one- and two-family homes, create considerable barriers to overcome without policy modifications or City intervention, when housing-centric development is desired.

Considerations

The following are considerations the City can evaluate further to encourage alignment of policies and support housing-centric development along the Corridor.

Comprehensive Plan. Utilize the upcoming comprehensive planning process to establish a community vision which acknowledges the housing needs of the community and update the Wisconsin Avenue Corridor Plan. A comprehensive plan with a community vision that supports housing investment and an updated corridor plan will aid in prioritizing new policy and/or adjustments needed to encourage housing-centric development.

- Create a community vision
- Confirm the vision via comprehensive planning activities
- Update the Wisconsin Avenue Corridor Plan
- Identify key properties for (re)development
- Conceptualize catalytic, housing-centric project(s)
- Create plan to acquire and reposition land for (re)development*
- Facilitate proactive rezoning of parcels to accommodate housing-centric projects

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Form-Based Code. Establish a form-based code overlay for the Corridor to alleviate the current use restrictions dictated by the commercial zoning designation. Form-based code will allow the City to determine the desired building form (i.e. size and intensity)and how it interacts with the streetscape to support the mixed-use land uses that exist within the Corridor, as well as future uses, including housing-centric projects. The overlay area should extend to the north and south of the Corridor to allow for necessary transitions into the less dense, residential areas, which currently do not exist.

Resources:
Form-Based Codes Institute
Congress for the New Urbanism

A form-based code is a land development regulation that fosters predictable built results and a high-quality public realm by using physical form (rather than separation of uses) as the organizing principle for the code. A form-based code is a regulation, not a mere guideline, adopted into city, town, or county law. A form-based code offers a powerful alternative to conventional zoning regulation.

Congress for New Urbanism

Funding tools to support and catalyze mixed-use, housing-centric projects along the Corridor include:

- Appleton Redevelopment Authority - Create a Corridor Land Banking Plan*
- Tax Incremental Financing - Establish a Mixed-Use or Blighted TIF District

THEME | 02

Encourage a positive development approval experience for housing-centric projects.

RECOMMENDATION | 02.1

Create a project point of entry and entitlement flow chart for housing-centric projects.

AREA OF FOCUS

Create a sample infographic that summarizes the subdivision plat process.

The sample infographic document created summarizes and outlines the major components of the plat review process. The document is intended to assist the City in creating and executing a streamlined development review process by consolidating information related to project point of entry, approval milestones, department information and project requirements. The document summarizes the process per the municipal code, however City staff and departments involved in the subdivision plat review process should collaborate to confirm internal processes and expectations reflect what is published. An infographic document is a simple, yet effective resource for communicating complex processes to internal staff, governing bodies and developers interested in pursuing a subdivision development in the community.

IMPORTANT NOTE
This is a proposed process and will prompt Subdivision Ordinance Amendments.

CITY OF APPLETON

SUBDIVISION PLAT PROCESS

Phase 1 Info Gathering & Scoping

- Developer contacts CED staff for requirements and to learn next steps
- Typical info: future land use, zoning, parkland (or fee in lieu), trail connectivity, street access, officially mapped roadways, utilities, stormwater, fire code, annexation (if needed), etc.
- Identify outside review agencies that need to be consulted
- Internal communication among various City departments (CED, DPW, PRFM, Fire, Attorney)

Community and Economic Development Dept. (CED)
CED staff will lead the subdivision plat process and facilitate necessary coordination efforts with the other involved City depts.

DPW	PRFM	FD	Atty

Phase 2 Concept Review & Refinement

- Developer provided concept plan to CED (Planner that fielded initial inquiry to act as case manager)
- Concept shared with internal City team; Each dept. reviews concept against applicable plans, policies, and regulations
- CED facilitates any troubleshooting and compiles comments across all depts.; Internal communication via shared folder
- CED prepares draft Development Agreement
- Meeting with Developer to discuss City staff comments and begin development agreement negotiations
- Repeat Phase 2 as needed

City
Goal is to catch and communicate any big issues during concept review. Changes are costly later on.

Phase 3 Preliminary Plat

- Developer submits Pre-Plat and related materials to CED
- Development agreement approval must track with Pre-Plat (and other legislative actions, such as rezoning)
- Plan Commission, Municipal Services Committee, and Finance Committee review and make recommendations prior to action at Common Council

City
- Plan Commission: Pre-Plat, Rezone, Comp Plan or Park
- Muni Services Committee: Street Cross Section, Trail, Side Path
- Finance Committee: Development Agreement

Phase 4 Final Plat & Approval

- Complete any required changes, updates, or amendments identified in the preliminary plat process
- Developer submits Final Plat and related materials to CED
- Plan Commission reviews and makes recommendations prior to action at Common Council

City
After Final Plat Approval, the Final Plat and Development Agreement both need to be recorded.

Community and Economic Development Dept.
[Name], [Title]
[Phone]
[Email]

THE SUBDIVISION PLAT PROCESS AND REGULATIONS ARE PUBLISHED IN THE MUNICIPAL CODE OF THE CITY OF APPLETON IN ACCORDANCE WITH WISCONSIN STATE STATUTES. THIS INFOGRAPHIC IS ADAPTED FROM THE CODE (THAT WILL BE UPDATED). FOR COMPLETE INSTRUCTIONS ON THE PLAT PROCESS PLEASE REFER TO THE MUNICIPAL CODE.

THEME | 03

Encourage activation of existing housing-centric policy.

RECOMMENDATION | 03.1

Create standard operating procedures for existing housing-centric policies.

AREA OF FOCUS

Create a sample infographic that summarizes what an accessory dwelling unit (ADU) is and the approval process.

The sample infographic document is an educational tool created to activate existing policy by illustrating the basics of accessory dwelling units (ADU) and the approval process for an ADU project per the municipal code. The document is meant to be informative and easily navigable to community members interested in pursuing an ADU project in the community.

The process outlined in this document is based on the City of Madison's approval process. To ensure accuracy and consistency, CED staff should confirm the process being published aligns with ordinance provisions and internal processes. Communities with noteworthy resources related to ADUs include: Madison, WI, San Francisco, CA, and Portland, OR.

Consider adding a project resources component to future ADU web-based resources to allow interested community members easy access to pertinent property information, checklists, applications and project partners references (e.g. architects, contractors, etc.)

CITY OF APPLETON
COMMUNITY AND ECONOMIC DEVELOPMENT DEPT.

ADU BASICS

WHAT ?

ACCESSORY DWELLING UNIT (ADU) means an attached or a detached dwelling unit, which provides complete independent living facilities for one or more individuals and includes permanent provisions for living, sleeping, eating, cooking, and sanitation.

WHERE ?

ADU's may be permitted in the R-1A, R-1B, R-1C, R-2 and R-3 residential zoning districts in conjunction with an existing built or proposed to be built single-family detached dwelling or two-family-zero lot line dwelling.

TYPES.

*Junior ADU is the only situation where bathing/sanitation facilities can be shared with the primary dwelling unit.

NEXT STEPS ?

Interested in an ADU for your property?
The following page provides an overview of the ADU review, approval and inspections process for the City of Appleton.

Community and Economic Development Dept.
[Name], [Title]
[Phone]
[Email]

CITY OF APPLETON
COMMUNITY AND ECONOMIC DEVELOPMENT DEPT.

ADU PROCESS

1 Make Contact

Contact the Community and Economic Development Dept. (CED) to confirm your planned project is doable given zoning and lot constraints.

2 Preliminary Review

Schedule a meeting with CED staff for a preliminary review of your project plans for compliance with applicable regulations.

3 Apply for Permit(s)

Coordinate with your licensed contractors to apply for your project building permit(s) with CED.

4 Obtain Permits

Upon completion of the preliminary review, contractors will be required to pay for the permit(s) and are able to pick up approved plans.

Construction can begin when necessary permits are received and posted in a visible location on the project.

5 Coordinate Inspections

CED inspector contact information will be provided upon issuance of project permits. Final inspections must be approved for all project permits.

6 Project Completion

upon completion of your projects and all permits are closed, a certificate of occupancy will be issued.

THIS GUIDE IS MEANT TO BE SUMMARIZING IN NATURE AND NOT A COMPLETE ADU RESOURCE. SEE SECTION 23-55 & 23-56, MUNICIPAL CODE OF THE CITY OF APPLETON, WISCONSIN OR CONTACT THE COMMUNITY AND ECONOMIC DEVELOPMENT DEPT. FOR COMPLETE ORDINANCE AND PROCESS RELATED INFORMATION.

THEME | 04

Encourage a proactive approach to catalyzing housing-centric development and investment.

RECOMMENDATION | 04.1

Leverage existing resources and organizations to incentivize housing development.

AREA OF FOCUS

Assess the Appleton Redevelopment Authority (ARA) and explore opportunities to activate and utilize its power/duties.

The Appleton Redevelopment Authority (ARA) exercise is intended to outline and guide potential next steps towards positioning the ARA to actively acquire and position strategic property for future development.

In addition to summarizing organizational next steps, examples of redevelopment authority program activation and resources from other communities are provided, including budget and funding mechanisms.

APPLETON REDEVELOPMENT AUTHORITY

Green Bicycle Co. recommends the City of Appleton utilize the Appleton Redevelopment Authority (ARA) to facilitate property acquisitions and proactively position and market the sites for future housing-centric development.

The active pursuit of strategic property acquisitions would expand upon the ARA's current activities, which include the approval to issue bonds for the Exhibition Center and the creation of a Business Enhancement Grant program.

ARA Next Steps

Mission/Purpose. Establish a mission or purpose statement for the ARA. Display it on the website and meeting agendas, and use it to guide program creation.

Redevelopment Plans. Create redevelopment plans that align with neighborhood and corridor plans. Consider reviewing existing redevelopment plans.

Budget. An initial budget should be established to begin the program. It will evolve into a revolving fund as properties are acquired and sold.

Initial ARA Budget Options:

- Line-item from City Budget, one-time or annual.
- Contribution from healthy fund balance.
- Community Development Block Grant (CDBG) funds.
- Lump sum from closed TID if part of the TID plan. TID plan could be amended.
- One year of full TIF increment for affordable housing from closed TID.
- Traditional Loan.
- Pursue other grants.

City of Milwaukee's Redevelopment Authority mission and programs to achieve the mission.

The mission of the Redevelopment Authority is to eliminate blighting conditions that inhibit neighborhood reinvestment, to foster and promote business expansion and job creation, and to facilitate new business and housing development. Toward that end, the Redevelopment Authority:

- Prepares and implements comprehensive redevelopment plans
- Assembles real estate for redevelopment
- Is empowered to borrow money, issue bonds and make loans
- Can condemn property (eminent domain) in furtherance of redevelopment objectives

The Redevelopment Authority relies upon the Department of City Development for the professional, technical and administrative support necessary to carry out its mission.

ARA Next Steps (cont'd)

Programs. Be proactive in positioning sites for (re)development by acquiring properties.

- Acquiring properties will allow the City of Appleton to build a land bank, position catalytic projects in a timely manner, bridge the gap for brownfield or redevelopment projects, plan for future development, and market properties.
- Existing resources may be offered as incentives for developments that are in line with the current vision.

CED Staff. Collaborate with CED staff on Appleton Redevelopment Authority programs. For example, market ARA property and provide key information such as current zoning and funding opportunities to increase developer interest.

Implement. Use Redevelopment Plans to guide aquisitions and investments.

Additional Funding. Oversee additional funding programs such as the EPA Brownfield grant described in Innovative Guide Element Section for Public Institutional sites.

City of Appleton Comprehensive Plan 2010-2030, ARA recommendations:

- 5.2.5 Support the efforts of the Appleton Redevelopment Authority (ARA) to condemn and acquire dilapidated properties in order to create desirable residential redevelopment sites.
- 5.2.6 Fund the ARA at a level that allows it to use statutory powers to acquire and consolidate properties to make them more attractive for redevelopment by private developers.

City of Green Bay

List of parcels owned by the Redevelopment Authority of the City of Green Bay. Parcels listed can be utilized in various ways from new development to the expansion of non-buildable lots to neighboring parcels.

HOUSES | RESIDENTIAL LOTS | OTHER LOTS | LARGE DEVELOPMENT SITES

Address	Parcel ID	Lot Size	Current Zoning	Plan/ Incentive	Asking Price
300 S Ashland Avenue	3-622	39' x 123'	OR - Office Residential	Single family home **Grant May Be Available** (Conditional Use Permit required)	$11,500

THEME | 05

Proactively engage with the community to better communicate changes to housing-centric policies and processes.

RECOMMENDATION | 05.1

Regularly provide opportunities for staff to engage with elected and appointed officials to increase understanding of housing-centric policies and processes.

AREA OF FOCUS

Create a presentation template for CED staff to utilize in communicating policy and/or process updates to decision-making bodies.

The sample presentation created is intended to be used as an orientation and/or continuing education tool to inform decision-making officials on new and existing policies and processes related to housing-centric development and investment in the community.

CED and City staff will have a platform to communicate information related to the development, interpretation, coordination and implementation of policies and processes that guide their review, and ultimately, recommendations to members of committees, commissions and council for specific development projects.

The process outlined in the presentation included reflects the subdivision plat process from the Area of Focus 2 infographic.

CED UPDATE

[NAME], [TITLE]
Community and Economic Development Dept.
2024

AGENDA

Mission
Team
Topic
Subdivision Plat Process

OUR MISSION

Deliver programs, administer regulations, and provide resources to:

- Present Appleton as a **leader** in the Fox Cities in which to live and do business,
- Promote **comprehensive and smart growth** concepts to ensure land use compatibility and quality built environments,
- **Enhance and diversify** the tax base through new construction and reinvestments in existing areas,
- Support improvements in the housing stock and **advance the quality of our neighborhoods**,
- Partner with the community in initiatives that **promote Appleton** as a vibrant area and improve the lives of Appleton's citizens.

MEET THE TEAM

Director
Kara Homan

Deputy Director
David Kress

Principal Planner
Don Harp

Principal Planner
Jessica Titel

Principal Planner
Lindsey Smith

ED Specialist
TBD

Inspection Supervisor
Kurt Craanen

Commercial Inspector
Dan Meissner

Residential Inspector
Rich Hamlet

Erosion Control Insp.
Dan Faust

CED UPDATE

IMPORTANT NOTE
This is a proposed process and will prompt Subdivision Ordinance Amendments.

SUBDIVISION PLAT PROCESS

State Statute
Chapter 236 of the Wisconsin State Statute

Local Ordinance
Chapter 17 of the Municipal Code of the City of Appleton, Wisconsin

Jurisdictional Collaboration
WDNR, WISDOT, County, etc.

SUBDIVISION PLAT PROCESS

CED UPDATE

Phase 1 Info Gathering & Scoping

- Developer contacts City staff for requirements and to learn next steps
- Typical info: future land use, zoning, parkland (or fee in lieu), trail connectivity, street access, officially mapped roadways, utilities, stormwater, fire code, annexation (if needed), etc.
- Identify outside review agencies that need to be consulted
- Internal communication among various City departments (CED, DPW, PRFM, Fire, Attorney)

Community and Economic Development Dept. (CED)
CED staff will lead the subdivision plat process and facilitate necessary coordination efforts with the other involved City depts.

DPW	PRFM	FD	Atty

Phase 2 Concept Review & Refinement

- Developer provided concept plan to CED (Planner that fielded initial inquiry to act as case manager)
- Concept shared with internal City team; Each dept. reviews concept against applicable plans, policies, and regulations
- CED facilitates any troubleshooting and compiles comments across all depts.; Internal communication via shared folder
- CED prepares draft Development Agreement
- Meeting with Developer to discuss City staff comments and begin development agreement negotiations
- Repeat Phase 2 as needed

City
Goal is to catch and communicate any big issues during concept review. Changes are costly later on.

SUBDIVISION PLAT PROCESS

CED UPDATE

Phase 3 Preliminary Plat

- Developer submits Pre-Plat and related materials to CED
- Development agreement approval must track with Pre-Plat (and other legislative actions, such as rezoning)
- Plan Commission, Municipal Services Committee, and Finance Committee review and make recommendations prior to action at Common Council

City

- Plan Commission: Pre-Plat, Rezone, Comp Plan or Park
- Muni Services Committee: Street Cross Section, Trail, Side Path
- Finance Committee: Development Agreement

Phase 4 Final Plat & Approval

- Complete any required changes, updates, or amendments identified in the preliminary plat process
- Developer submits Final Plat and related materials to CED
- Plan Commission reviews and makes recommendations prior to action at Common Council

City

After Final Plat Approval, the Final Plat and Development Agreement both need to be recorded.

SUBDIVISION PLAT PROCESS

QUESTIONS?

FUTURE TOPICS

- Accessory Dwelling Unit (ADU)
- Rezoning
- TBD
- TBD

THANK YOU

COMMUNITY AND ECONOMIC DEVELOPMENT DEPT.

CITY OF APPLETON INCORPORATED 1857 WISCONSIN

INNOVATIVE GUIDE ELEMENT

Evaluate the repositioning of sites designated Public Institutional for future housing opportunities, when appropriate*.

The concept of Public Institutional site re-use and/or redevelopment was introduced to the project as part of the Scenario Planning Exercise during the Focus Group Meetings. Participants reiterated the importance of the City to take proactive measures in facilitating repositioning projects. This exercise summarizes the avenues the City could pursue in assessing, supporting and implementing a program to reposition Public Institutional sites for future housing-centric (re)development.

*The City is not encouraging / forcing the closure of places of worship, schools, etc. The focus is that when these closures or consolidations occur, the buildings are often located within existing neighborhoods and typically lend themselves to adaptive reuse for residential.

Development and Housing Funding Opportunities

EPA Brownfield Grants (City Lead)

- Assessment Grants provide funding for brownfield inventories, planning, environmental assessments and community outreach.
- Cleanup Grants provide funding to carry out cleanup activities at brownfield sites owned by the applicant.
- Multipurpose Grants are appropriate for communities that have identified through community engagement efforts a discrete area (such as a neighborhood, a number of neighboring towns, a district, a corridor, a shared planning area or a census tract) with one or more brownfield sites.
- Revolving Loan Fund (RLF) Grants provide funding for a grant recipient to capitalize a revolving loan fund and to provide loans and subgrants to carry out cleanup activities at brownfield sites.
- Job Training Grants provide environmental training for residents impacted by brownfield sites in their communities.

WEDC Brownfield Grant

- Wisconsin's Brownfields Grant Program provides funds to assist with the assessment and remediation of environmental contamination of abandoned, idle or underused industrial or commercial facilities or sites.

WEDC Community Investment Development Grant

- The CDI Grant Program will support urban, small city and rural community (re)development efforts by providing financial incentives for shovel-ready projects with emphasis on, but not limited to, downtown community-driven efforts.

INNOVATIVE GUIDE ELEMENT

Green Bicycle Co. recommends the City of Appleton take a proactive and methodical approach to reposition Public Institutional sites for housing-centric projects.

GBC outlines steps the City can take to support redevelopment opportunities as churches, schools, and hospitals become available for purchase.

Support Redevelopment of Public Institutional Sites

Inventory. Use GIS to identify Public Institutional Sites.

Assess. Create a ranking or scale to evaluate properties. Potential factors: active, inactive, for-sale, or vacant. Other factors may include: ownership, market value, environmental or structural concerns, surrounding neighborhood, or historic preservation.

Examples. Evaluate neighboring community examples including the City of Oshkosh - school to senior apartment redevelopment and City of Kaukauna - Post Office demolition to workforce housing development.

According to the American Planning Association Planning Magazine article from Summer 2023 issue titled "Beyond Faith: How planners can help resurrect aging and empty church properties, support communities, and expand housing opportunity." by Nadia Milan, PhD, and Rick Reinhard,

"A Protestant denomination in New Jersey rated its 500-plus churches on 10 factors and reported that 20 percent were in critical condition, with tiny congregations, precarious finances, and deteriorated real estate. Forty percent were right behind in serious condition."

The City of Seattle created an Incentive Zoning Program, a voluntary program in which developers provide specific amenities in exchange for extra floor area or height beyond the base amount allowed for their building by the Land Use Code.

Developers that provide the affordable units may receive a 10 percent density bonus, a subsidy of $5,000 to $10,000 per affordable unit for up to 50 percent of the total affordable units, a reduction in parking requirements, and an expedited permitting process.

Support Redevelopment of Public Institutional Sites (Cont'd)

Project Support. Include projects in neighborhood and/or redevelopment plans. Purchase the property. Identify funding opportunities. Update zoning for redevelopment. Create and market "request for proposal" for (re)development. Consider creating a "density bonus" for (re)development opportunities. opportunities.

Historic Preservation. Consider creating criteria for evaluating the historic preservation potential of a project. Note: it does not need to be a National Registry property to be worth of saving. Does it add to the character of the neighborhood?

Affordable Housing Developers. Create a reference resource with examples of completed adaptive re-use projects in the City.

Match Maker. If an institutional organization would like to lead the (re)deveopment project, connect them with developers that will assist with the process.

Project Preparation. Consider purchasing the property and preparing it for (re)development with environmental and structural evaluation, zoning updates, funding opportunities, promote surrounding amenities (e.g. public transportation), and market studies.

Focus Group Highlight with respect to redevelopment: "Mixed use location but the City would need to "drive the bus" and bring the right people to the table."

Partner with institutional organizations, or purchase their property, to help move the project forward. Consider ways to minimize development risk for institutional organizations that may not be familiar with the entitlement or development process.

Considerations for cities to plan for Public Institutional site transitions

1. Convene a forum or work group of interested religious groups, hospital organizations, school district administrators, and other nonprofits, that might be considering property transitions.
2. Dedicate a process team or staff team to provide technical assistance to public institutions that are considering property transitions.
3. Evaluate and update neighborhood plans or redevelopment plans to consider which Public Institutional sites are potentially going to experience a property transition in the coming years.

Adapted from "It's Time for City Planners To Be Proactive About Church Property Transitions" by Kurt Paulsen

APPENDICES

APPENDIX A
STAKEHOLDER ENGAGEMENT PLAN

APPENDIX B
SUMMARY OF FINDINGS

APPENDIX A

STAKEHOLDER ENGAGEMENT PLAN

Stakeholder Engagement Plan

A component of the Housing Development Policy Guide

November 17, 2023

Reviewed by CED Staff: November 30, 2023

Presented to the Mayor's Taskforce on Housing Development Policy: December 6, 2023

Prepared By

Chelsea Couette &
Heather Cleveland, AICP

Green Bicycle Co. ("GBC")
1117 N 8th Street
Sheboygan, WI 53081

GREEN BICYCLE CO.
Building conscious communities

Prepared For

City of Appleton &
Mayor's Taskforce on Housing Development Policy

Community & Economic Development Department ("CED")
100 N Appleton Street
Appleton, WI 54911

CITY OF APPLETON INCORPORATED 1857 WISCONSIN

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06. NEXT STEPS

APPENDICES

Appendix A - Internal Stakeholder List

Appendix B - External Stakeholder List

Appendix C - Internal Stakeholder Survey & Interview Form

Appendix D - External Stakeholder Survey & Interview Form

Photo Credit: Fox Cities Convention and Visitors Bureau

Introduction

The stakeholder engagement plan is an integral component for the development of the Housing Development Policy Guide ("Guide"). The Stakeholder Engagement Plan will identify strategies to develop, gather, organize and evaluate relevant data and feedback from internal (e.g. municipal staff) and external (e.g. housing experts and community leaders) stakeholders. By engaging with strategically identified internal and external stakeholders, the feedback collected will support our understanding of existing policy and process deficiencies, housing market gaps and future housing development potential. To then develop recommendations for impactful municipal policy and process adjustments, and, ultimately, aid the City of Appleton ("City") to capture its portion of regional housing growth, development and investment.

The feedback generated by the internal and external stakeholder engagement activities will then be evaluated, assessed, and organized by GBC into the draft recommendations and, ultimately, refined into the final recommendations with implementation guidelines and outcome opportunities in the Housing Development Policy Guide.

Stakeholder Identification

GBC, working with City staff and the Task Force, assembled two stakeholder lists, internal and external. The two-pronged approach to stakeholder engagement allows for both the municipal and non-municipal perspectives to be considered and integrated into the Guide recommendations. Leveraging the guidance and insight of City staff and the Task Force in assembling the stakeholder lists was important for the inclusion of individuals who may not have otherwise been represented or identified to participate in stakeholder engagement activities. The established relationships of City staff and Task Force members with the stakeholders will also be integral in garnering support, feedback and participation as stakeholder engagement activities progress over the course of the project.

Internal Stakeholders

Internal stakeholders include City staff from various departments who are involved in the review and approval process of housing-centric projects in the City. CED staff provided a list of approximately twenty-one individuals to be included in the internal stakeholder engagement efforts.

See Appendix A - Internal Stakeholder List

External Stakeholders

External stakeholders are individuals who are involved in various sectors of the housing industry in the City and greater Fox Cities region, as well as those individuals involved in community development and outreach through nonprofit and other community-based organizations. CED staff and Task Force members collaborated to develop a list of approximately ninety-four individuals from diverse sectors of the housing industry to be included in the external stakeholder engagement efforts.

See Appendix B - External Stakeholder List

Stakeholder Engagement Activities

Internal Stakeholder Engagement Activities

City staff, as internal stakeholders, will include department leaders, as well as their teams and individuals who are involved with and contribute to housing-centric projects at various phases of the project planning, review, approval and inspection process. The goals for internal stakeholder engagement are to identify any policy or procedural deficiencies that currently exist and develop recommendations for policy, procedural and/or communication adjustments that would result in the easing of said deficiencies to encourage additional development and investment in housing-centric projects in the City.

Internal stakeholder engagement methods will include online surveys and interviews. Both methods will focus on the topics of policy, process and procedures, interdepartmental collaboration, friction, recommendations for improvement and examples of best practices. It is imperative that consistency be maintained in both methods of engagement in regard to online survey and interview topics in order to distinguish trends and develop meaningful recommendations.

See Appendix C - Internal Stakeholder Survey & Interview Form

External Stakeholder Engagement Activities

The housing industry encompasses many asset classes (e.g. single family, multi-family, owner-occupied, renter-occupied, accessory dwelling units, etc.) and a diversity of professionals from many different sectors (e.g. developer, home builder, general contractor, real estate brokerage, engineer, architect, lender, nonprofit, trade association, economic development, etc.). The external stakeholder list includes individuals who are employed within the various housing industry sectors, as well as community leaders who have an understanding of the housing needs in the City. The feedback and perspectives of the external stakeholders will be another integral component when developing recommendations for the Guide.

The goal for external stakeholder engagement is to gain valuable insight into historical housing trends from housing industry professionals and community leaders, in addition to identifying current market conditions and opportunities for future housing development in the City. External stakeholder feedback will also assist in the development of recommendations to alleviate any potential deficiencies in current municipal policy, processes and communications, to further the City's ability to attract and grow investment in housing-centric projects.

External engagement methods will include online surveys, interviews and focus group meetings. All methods of engagement will focus on the topics of housing market insight and development potential, policy, process and procedures and recommendations for improvement. Again, maintaining consistency across engagement methods will be necessary in order to distinguish trends and develop meaningful recommendations.

See Appendix D - External Stakeholder Survey & Interview Form

Focus Groups & Scenario Planning Exercise

Within the larger external stakeholder list, members of the Task Force selected certain individuals to participate in focus group meetings. These individuals were selected because they represent a cross-section of experience and are intended to generate good input and conversation in regard to the housing industry in the City and region.

Focus Group attendees will be provided the online survey at the same time it is circulated to the larger external stakeholder group, estimated to be early December and prior to the focus group meetings. Results of the online survey, to-date, will be evaluated by GBC prior to the focus group meetings, and additional questions will be derived from the survey results to aid in facilitating conversation and additional feedback during the focus group meetings.

Participants in the focus group meetings will be presented with the selected site(s) for the Scenario Planning Exercise for the Guide and will be asked to provide feedback and recommendations for potential housing (re)development opportunities based on professional experience and market conditions. The feedback will then be integrated into the Scenario Planning section of the Guide with additional input from GBC on policy, approval procedures and potential funding opportunities to support the development recommendations made during the Scenario Planning Exercise.

Stakeholder Engagement Summary Table

Below is a summary of the stakeholder engagement activities. In an effort to increase stakeholder responsiveness to the various engagement methods, the Director of Community and Economic Development will work with GBC to prepare and circulate an email to the internal and external stakeholders describing the project in more detail and introducing the GBC team and engagement activity participation being requested.

STAKEHOLDER	ENGAGEMENT METHOD	ENGAGEMENT FORMAT	TARGETED ENGAGEMENT	MATERIALS REQUIRED	FOLLOW-UP	TARGET ENGAGMENT OUTREACH START DATE	TARGET ENGAGEMENT COMPLETION DATE
Internal (21)	Online Survey	Email	85%	Internal Stakeholder Survey	GBC to make up to 3 efforts to coordinate and facilitate engagement with internal and external stakeholders	Week of 12/4/23	1/19/24
	Interview	In-Person Meeting or Via Zoom	3 Group Interviews				1/5/24
External (94)	Online Survey	Email	60%	External Stakeholder Survey			1/19/24
	Interview	In-Person Meeting or Via Zoom	4 Interviews				
	Focus Group	In-Person Meeting or Via Zoom	Approx. 7 Attendees Per Group	Survey Results (to-date) + Scenario Planning Exercise Materials			

Next Steps

The feedback generated by the internal and external stakeholder engagement activities will then be evaluated, assessed, and organized by GBC into the draft recommendations and, ultimately, refined into the final recommendations with implementation guidelines and outcome opportunities in the Housing Development Policy Guide.

Appendix A

Internal Stakeholder List

First Name	Last Name	Title	Dept.	Email	Phone #	Suggested Engagement Strategy
Amanda	Abshire	Deputy City Atty	Attys Office	amanda.abshire@appleton.org	920-832-6423	Survey
Chris	Behrens	City Atty	Attys Office	chris.behrens@appleton.org	920-832-6423	Survey
Conner	Deeg	DPW Asst Traffic Engineer	DPW	connor.deeg@appleton.org	920-832-5942	Survey
Dan	Meissner	Commercial Inspector	CED	daniel.meissner@appleton.org	920-832-6418	Interview Group 3
Dan	Faust	Erosion Control Inspector	CED	dan.faust@appleton.org	920-832-5879	Survey
Dani	Block	DPW Director	DPW	blockdl@appleton.org	920-832-6482	Interview Group 1
David	Kress	Deputy CED Director	CED	david.kress@appleton.org	920-832-6428	Interview Group 1
Derek	Henson	Fire Inspector	FD	derek.henson@appleton.org	920-832-3934	Survey
Don	Harp	Principal Planner	CED	don.harp@appleton.org	920-832-6466	Survey
Eric	Lom	DPW Traffic Engineer	DPW	eric.lom@appleton.org	920-832-3958	Survey
Jake	Woodford, Mayor	Mayor/Chair of Plan Commission	Mayor's Office	jake.woodford@appleton.org	920-832-6400	Survey
Jessica	Titel	Principal Planner	CED	jessica.titel@appleton.org	920-832-6476	Interview Group 2
Kara	Homan	CED Director	CED	kara.homan@appleton.org	920-832-6408	Interview Group 1
Kurt	Craanen	Inspection Supervisor	CED	kurt.craanen@appleton.org	920-832-6413	Survey
Lindsey	Smith	Principal Planner	CED	lindsey.smith@appleton.org	920-832-3943	Interview Group 2
Mark	Layah	Asst. City Engineer	DPW	mark.lahay@appleton.org	920-832-6486	Survey
Matt	Rehbein	Econ Dev Specialist	CED	matthew.rehbein@appleton.org	920-832-6463	Survey
Pete	Neuberger	City Engineer/Deputy DPW Director	DPW	peter.neuberger@appleton.org	920-832-6485	Interview Group 1
Rich	Hamlet	Residential Inspetor	CED	hamletrj@appleton.org	920-832-6416	Interview Group 3
Sue	Olsen	Engineer	DPW	sue.olson@appleton.org	920-832-6473	Survey
Tom	Flick	Parks	PRFM	tom.flick@appleton.org	920-832-3915	Survey

Appendix B

External Stakeholder List

First Name	Last Name	Organization	Email	Phone #	Sector	Suggested Engagement Strategy	Provided By	
Abby	Maslanka	Martenson & Eisele			Engineer	Focus Group 1	Heidi Zich	HBA Fox Cities
Amy	McGowan**	Habitat for Humanity FC			Non Profit	Survey	Task Force Member	
Amy	Oelhafen	Pfefferle Companies			Real Estate Brokerage	Focus Group 3 - Comm	Kara Homan	City of Appleton
Andrew	Dane	Private Developer/PC Member			Developer	Survey	Kara Homan	City of Appleton
Andy	Andersen	Appletree Homes			Home Builder	Interview	Kara Homan	City of Appleton
Andy	Dumke	Alliance Development			Developer	Survey	Kara Homan	City of Appleton
Anne	Higgins	Appleton Redevelopment Authority				Survey	Kara Homan	City of Appleton
Becky	Bartoszek*	Fox Cities Chamber				Survey	Task Force Member	
Becky	Heldt	Advocap			Non Profit	Survey	Kara Homan	City of Appleton
Ben	Bruns	Boldt Construction			General Contractor	Survey	Lindsey Smith	City of Appleton
Ben	Hamblin	McMahon			Engineer	Survey	Kara Homan	City of Appleton
Brandon	Robaidek	Robert E. Lee & Associates, Inc.			Engineer	Survey	Kara Homan	City of Appleton
Brent	Dahlstrom	Merge Urban Development			Developer	Focus Group 3 - Comm	Kara Homan	City of Appleton
Brian	Calmes	Calmes & Rohm Construction			Home Builder	Focus Group 2	Heidi Zich	HBA Fox Cities
Brian	Julius	Nicolet National Bank			Lender	Focus Group 1	Jennifer Sunstrom	NE WI Realtors Assoc
Carl	Romenesko	Romenesko Developments			Developer	Interview	Jennifer Sunstrom	NE WI Realtors Assoc
Carrie	Kuiper	Outagamie Co. Housing Authority				Survey	Kara Homan	City of Appleton
Cheryl	Ellis	Prospera Credit Union			Lender	Focus Group 2	Heidi Zich	HBA Fox Cities
Chris	Badtke	CD Smith			General Contractor	Survey	Lindsey Smith	City of Appleton
Colin	Cassady	Alexander Company			Developer	Survey	Dave Kress	City of Appleton
Corey	Krueger	Star Service Realty			Real Estate Agent	Survey	Dave Kress	City of Appleton
Dave	Voss, Jr.	Miron Construction			General Contractor	Survey	Lindsey Smith	City of Appleton
David	Baehr	American Realtors			Real Estate Agent	Survey	Kara Homan	City of Appleton
Debra	Dillenberg	Appleton Housing Authority				Survey	Kara Homan	City of Appleton
Denise	Fenton*	Appleton City Alderperson				Survey	Task Force Member	
E-Ben	Grisby	Celebrate Diversity Fox Cities			Non Profit	Survey		
Eric	Broten**	Fox Cities Chamber				Survey	Task Force Member	
Ernesto	Gonzalez	Casa Hispania			Non Profit	Survey	Kara Homan	City of Appleton
Ethan	Fett	Blue Sky Contractors			General Contractor	Focus Group 3 - Comm	Kara Homan	City of Appleton
Fanni	Xie	Northeast Wisconsin Chinese Association (NEWCA)			Non Profit	Survey		
Garritt	Bader	GB Real Estate Investments			Developer	Survey	Dave Kress	City of Appleton
Gene	Schleusner	Consolidated Construction Co.			General Contractor	Survey	Lindsey Smith	City of Appleton
Heidi	Zich*	HBA Fox Cities			Trade Association	Survey	Task Force Member	
Howie	**Fuerst**	**Habitat for Humanity**			**Non Profit**	**Survey**	**Kara Homan**	**City of Appleton**
Jake	Czarnik-Neimeyer, Rev.	Zion Lutheran Church				Survey	Kara Homan	City of Appleton
Jason	Haen	Van's Construction			Home Builder	Focus Group 1	Jennifer Sunstrom	NE WI Realtors Assoc
Jason	Tadych	Tadych Investment Partners			Developer	Survey	Kara Homan	City of Appleton
Jeff	Heiting	Jeff Heiting Builder			Home Builder	Focus Group 1	Kara Homan	City of Appleton
Jeff	Rustick	Schuler & Associates Inc.			Engineer	Survey	Kara Homan	City of Appleton
Jeff	Schultz	Martenson & Eisele			Engineer	Focus Group 2	Kara Homan	City of Appleton
Jennifer	Sunstrom*	NE WI Realtors Association			Trade Association	Survey	Task Force Member	
Jeremy	Olmstead	Van's Realty & Const.			Home Builder	Survey	Kara Homan	City of Appleton
Jill	Hendricks	Vision Realty & Development			Developer	Focus Group 2	Heidi Zich	HBA Fox Cities
Jim	Lundberg	Point of Beginning			Engineer	Survey	Kara Homan	City of Appleton
Jim	Sehloff	Davel Engineering			Engineer	Survey	Kara Homan	City of Appleton
Joel	Ehrfurth	Mach IV Engineering & Surveying			Engineer	Survey	Kara Homan	City of Appleton
John	Davel	Davel Engineering			Engineer	Focus Group 1	Kara Homan	City of Appleton
John	Ross	JROSS and Associates			Real Estate Brokerage	Focus Group 3 - Comm	Kara Homan	City of Appleton
John	Weyenberg*	Habitat for Humanity FC			Non Profit	Survey	Task Force Member	
Jon	Huss	Star Service Realty			Home Builder	Survey	Jennifer Sunstrom	NE WI Realtors Assoc
Jon	Searles*	WHEDA NE Rep			Economic Development	Survey	Task Force Member	
Josh	Brusewitz	Greenfire			General Contractor	Survey	Lindsey Smith	City of Appleton
Juan	Corpus	New North, Inc.			Non Profit	Survey		
Katie	Olson	ESTHER Fox Valley			Non Profit	Survey	Kara Homan	City of Appleton
Kip	Golden	CR Structures			General Contractor	Focus Group 3 - Comm	Kara Homan	City of Appleton
Kou	Vang	Hmong American Partnership			Non Profit	Survey	Kara Homan	City of Appleton
Kristen	Gondek	People of Progression			Non Profit	Survey	Kara Homan	City of Appleton
Kurt	Coenen	North Edgewood Estates Development			Developer	Survey	Dave Kress	City of Appleton
Lisa	Cruz	Multicultural Coalition Inc			Non Profit	Interview		
Lisa	Schmidt	Keller Williams/Schmidt Bros. Custom Homes			Real Estate Agent	Survey	Kara Homan	City of Appleton
Lisa	Strandberg	Pillars, Inc.			Non Profit	Survey	Kara Homan	City of Appleton
Long	Vue	New Hmong Professionals			Non Profit	Survey		
Maiyoua	Thao	Thao Enterprises			Community Organization	Survey	Kara Homan	City of Appleton
Marcus	McGuire	Marcus McGuire Homes			Home Builder	Focus Group 2	Heidi Zich	HBA Fox Cities
Marisssa	Downs	Mosaic Property Ventures			Developer	Interview	Kara Homan	City of Appleton
Mary	Winkel	Coldwell Banker TREG			Real Estate Agent	Survey	Heidi Zich	HBA Fox Cities
Matt	Cremer	Tegethoff Development			Developer	Focus Group 3 - Comm	Kara Homan	City of Appleton
Matt	Mrochinski	Excel Engineering			Engineer	Survey	Kara Homan	City of Appleton
Matthew	Cole					Survey	Kara Homan	City of Appleton
Mike	Kohlbeck	McMahon Associates			Engineer	Survey	Kara Homan	City of Appleton
Olumuyiwa	Adeboye, Dr.	African Heritage, Inc.			Non Profit	Survey	Kara Homan	City of Appleton
Pat	Kaster	River City Realtors			Developer	Focus Group 1	Jennifer Sunstrom	NE WI Realtors Assoc
Pat	Leigl	Salvation Army - housing provider			Non Profit	Survey	Kara Homan	City of Appleton

Phil	Romenesko	Romenesko Development			Home Builder/Developer	Survey	Kara Homan	City of Appleton
Ralph	Grebe	North Central Construction			General Contractor	Survey	Lindsey Smith	City of Appleton
Rich	Christensen	Associated Bank			Lender	Focus Group 2	Jennifer Sunstrom	NE WI Realtors Assoc
Rich	Van Sistine	Coldwell Banker/Van Sistine Homes, LLC			Builder/Real Estate Agent	Focus Group 2	Jennifer Sunstrom	NE WI Realtors Assoc
Sabrina	Robins,	ABACOR, LLC			Consultant	Survey	Task Force Member	
Sam	Statz, Dr.*	Hoffman Constsuction			General Contractor	Focus Group 3 - Comm	Kara Homan	City of Appleton
Scott	Grabau	Mark Winter Homes			Home Builder	Survey	Kara Homan	City of Appleton
Scott	Sheppard	We Energies			Energy/Utility	Survey	Dave Kress	City of Appleton
Shannon	Meyer	Cypress Homes			Home Builder	Focus Group 1	Jennifer Sunstrom	NE WI Realtors Assoc
Sridevi	Buddi	IndUS of the Fox Valley			Non Profit	Survey		
Steve	Wille	Hoffman Construction			General Contractor	Survey	Lindsey Smith	City of Appleton
Tami	McLaughlin	World Relief Fox Valley			Non Profit	Survey		
Tim	Ceman	Noble Assets				Survey	Kara Homan	City of Appleton
Tim	Rinn	Consolidated Construction Company			General Contractor	Survey	Dave Kress	City of Appleton
Tim	Wittmann	Davel			Engineer	Survey	Kara Homan	City of Appleton
Todd	Brokl	Appleton Redevelopment Authority				Survey	Kara Homan	City of Appleton
Tom	Boldt	BOLDT			General Contractor	Focus Group 3 - Comm	Kara Homan	City of Appleton
Tom	Klister*	FORE Development Inc.			Developer	Focus Group 3 - Comm	Task Force Member	City of Appleton
Tom	Kopps	Linked Living Homes				Survey	Kara Homan	City of Appleton
Tom	McHugh	Score Realty Group			Real Estate Agent	Focus Group 1	Jennifer Sunstrom	NE WI Realtors Assoc
Tom	Rooney*	Mark Winter Homes			Home Builder	Survey	Task Force Member	

Appendix C

Internal Stakeholder Survey & Interview Form

Internal Stakeholder Survey

The City of Appleton Community and Economic Development Department (CED) has partnered with Green Bicycle Co. (GBC) to develop a Housing Development Policy Guide. The guide, when completed, will focus on making recommendations to improve policy, process and communication to promote the development of higher density, more affordable housing options in the City of Appleton. In turn, the Department of Community and Economic Development seeks to encourage residential development that wisely uses the City infrastructure, capital, and service delivery resources and accelerates development of all housing products and types across the income spectrum in the community.

As a City of Appleton staff member involved in the review, approval and inspection of housing-centric projects your input as an Internal Stakeholder in the development of the Housing Development Policy Guide is requested. Your feedback will support GBC and the City of Appleton in identifying internal operation deficiencies and aid in forming recommendations for impactful municipal policy and procedural adjustments to ease barriers to development and favorably position the City of Appleton for on-going and future housing growth and investment.

The City of Appleton has expressed a willingness to receive feedback to facilitate the improvement of policy, process and communication by key stakeholders to improve the opportunities for near-term and long-term development of housing-centric projects in the City.

Deadline to complete this survey is Friday, January 19, 2024.

1. First Name, Last Name

_____

2. Department or Office

Mark only one oval.

- Community and Economic Development Development
- Department of Public Works
- Fire Department
- Police Department
- Parks, Recreation, and Facilities Management Department
- City Attorney's Office
- Mayor's Office
- Other: _____

3. Years with the City

Mark only one oval.

- Less than 1 year
- 1-5 years
- 6-10 years
- Over 10 years

4. Years of relevant experience

Mark only one oval.

- Less than 1 year
- 1-5 years
- 6-10 years
- Over 10 years

5. Have you worked for other municipalities?

Mark only one oval.

- Yes
- No

6. If yes, which municipalities?

_____

Policy

Statutes, ordinances, zoning code, etc.

7. How are policy changes communicated to you?

Check all that apply.

Check all that apply.

- [ ] Staff meetings
- [ ] Internal newsletters
- [ ] Public meetings
- [ ] Word of mouth
- [ ] City of Appleton website
- [ ] Newspaper
- [ ] Television
- [ ] Social media
- [ ] Other: _____

8. Are you aware of the recent changes in policy to encourage housing development? Check all that apply.

Check all that apply.

- [ ] Zoning Code. Amended CBD zoning in 2018 to allow ground floor residential (except along College Ave.) and standalone residential development.
- [ ] Zoning Code. Updated the C-1 zoning district in 2020 to accommodate mixed-use infill and redevelopment.
- [ ] Quality of Life. Completed the Downtown Streetscape Design Guide in 2021 to inform decisions as street reconstruction projects occur.
- [ ] Zoning Code. Amended the C-1 Neighborhood mixed use district (increased lot coverage, reduced parking requirements, no maximum MF density, reduced setbacks, encourage parking to the rear of the buildings)
- [ ] Zoning Code. Accessory Dwelling Units are now allowed in residential districts.
- [ ] Zoning Code. Allow for zero lot line duplex in R-2 and R-3 zoning districts.
- [ ] Zoning Code. Increased density in the R-3 district.
- [ ] Zoning Code. Subdivision Code Chapter 17 - Change timeline for parkland dedication fee to be paid at time of building permit instead of prior to subdivision plat being signed.
- [ ] Zoning Code. There are no parking requirements in the CBD district, the C-1 district reduces the required parking by 50% and the zoning code allows for a 20% administrative parking reduction/adjustment in all districts.
- [ ] Plan. Completed College Avenue North Plan to reimagine this neighborhood and identify redevelopment opportunities. Market study completed to identify gaps in the housing market.
- [ ] Other

9. How have the recent changes in policies impacted your work?

_____

_____

_____

_____

_____

10. How often do you find yourself educating colleagues or the community about City of Appleton housing policies (existing and new)?

Mark only one oval.

- Daily
- Weekly
- Monthly
- Never

11. Are all of your departments policies accessible for colleagues and community to view?

Mark only one oval.

- Yes
- No
- Maybe

12. How often does your department review current policies?

Mark only one oval.

- Quarterly
- Annually
- Other: _____

13. Do you have additional comments on City of Appleton housing policies?

Processes

Standard operating procedures, informal procedures, etc.

14. Which of the following entitlement processes do you interact with most frequently?

Mark only one oval per row.

	Daily	Weekly	Monthly	Never
Annexation Process (No electors reside in territory)				
Annexation Process				
Certified Survey Map (CSM) Application				
Final Plan Check List				
Lot Line Adjustment Application				
Preliminary and Final Plat Submittal Form				
Preliminary Play Check List				
Public Hearing and Informal Public Hearing Notice Matrix				
Rezoning Application				
Site Plan Review				
Special Use Permit				

Special Use Permit Application				
Street Vacation Procedures				
Rezoning Timeline				
Comprehensive Plan Amendment				

15. Does your department have a specific point-person for the department's role in the entitlement process for external stakeholders?

Mark only one oval.

- Yes
- No

16. If yes, who?

First Name, Last Name, Title

17. Do you know how to access the CED standard operating procedures?

Mark only one oval.

- Yes
- No

18. Would you be able to convey accurately the appropriate entitlement process to a colleague or client, if inquired upon?

Mark only one oval.

- Yes
- No

19. What could make communication of standard operating procedures easier?

20. Are there other procedures that should be formalized or addressed? If so, what are they?

21. Are there other (non-CED) Standard Operating Procedures your department utilizes with respect to the housing development process?

22. Does your department have a document to provide to the community or online that outlines the entitlement process?

Mark only one oval.

- Yes
- No
- Maybe

Collaborations

Interdepartmental communication and coordination.

23. How often do you interact with another department on a housing related project?

Mark only one oval.

- Daily
- Weekly
- Monthly
- Never

24. Would you characterize your interaction with other departments as formal or informal?

Mark only one oval.

- Formal
- Informal

25. How comfortable are you contacting another department to discuss a housing related project?

Mark only one oval.

- Yes
- No
- Somewhat
- Neutral
- Not applicable

26. Is the existing internal meeting structure for the entitlement process effective and beneficial?

Mark only one oval.

- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly agree

Friction

Areas of redundancy, lag time, vagueness or confusion of responsibility, etc.

27. Which of the following have you experienced?

Check all that apply.

- [ ] Redundancy
- [ ] Lag time
- [ ] Vagueness
- [ ] Confusion of responsibility
- [ ] Other: _____

28. If so, please provide examples.

The examples you provided will be used to make improvements.

_____

_____

_____

_____

_____

Recommendations for Improvement

Improve efficiencies in processes, increase transparency in communication, etc.

29. Do you have any recommendations to improve City of Appleton housing development policies, processes or procedures?

These can include examples from the City of Appleton or other communities.

_____

_____

_____

_____

_____

30. Any other comments.

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Appendix D

External Stakeholder Survey & Interview Form

External Stakeholder Survey

The City of Appleton Community and Economic Development Department has partnered with Green Bicycle Co. (GBC) to develop a Housing Development Policy Guide. The guide, when completed, will focus on making recommendations to improve policy, process and communication to promote the development of higher density, more affordable housing options in the City of Appleton. In turn, the Community and Economic Development Department seeks to encourage residential development that wisely uses the City infrastructure, capital, and service delivery resources and accelerates development of all housing products and types across the income spectrum in the community.

As a professional in the City of Appleton and Fox Cities region housing industry and community leader, your input as an External Stakeholder in the development of the Housing Development Policy Guide is requested. Your feedback will support GBC and the City of Appleton in identifying market gaps and future housing development potential, as well as aid in forming recommendations for impactful municipal policy and procedural adjustments to favorably position the City of Appleton for on-going and future housing growth and investment.

The City of Appleton has expressed a willingness to receive feedback to facilitate the improvement of policy, process and communication by key stakeholders in the community to improve the opportunities for near-term and long-term development of housing-centric projects in the City.

Deadline to complete this survey is Friday, January 19, 2024.

1. First name, last name

_____

2. Company/Organization Name

_____

3. What sector of the housing industry are you involved in?

Check all that apply.

Check all that apply.

- [ ] Developer
- [ ] Home Builder
- [ ] General Contractor
- [ ] Real Estate Brokerage
- [ ] Engineer
- [ ] Architect
- [ ] Lender
- [ ] Non-Profit
- [ ] Trade Association
- [ ] Economic Development
- [ ] Community Leader
- [ ] Other

4. Years of experience in the housing industry.

Mark only one oval.

- ( ) Less than 1 year
- ( ) 1-5 years
- ( ) 6-10 years
- ( ) Over 10 years

5. Have you completed, or are in the process of completing, a housing-centric project in the City of Appleton?

Mark only one oval.

- ( ) Yes
- ( ) No

6. If yes, please select all that apply.

Check all that apply.

- [ ] Subdivision land development
- [ ] Single-family home(s)
- [ ] Townhomes
- [ ] Apartments
- [ ] Condominiums
- [ ] Other: _____

7. When was your most recent housing project in the City of Appleton completed?

Mark only one oval.

- ( ) Less than 1 year ago
- ( ) 1-5 years ago
- ( ) 6-10 years ago
- ( ) Over 10 years ago

Housing Market Insight & Development Potential

Based on your professional expertise and understanding of the City of Appleton housing market and community, please respond to these market-based questions accordingly.

8. What housing type is currently in highest demand in the City of Appleton?

Mark only one oval per row.

	1 - highest demand	2	3 - lowest demand
Detached Single-family homes			
Middle Housing (townhomes, duplexes, triplexes, quadplexes)			
Apartments			

9. What housing type is currently under-represented, given potential market demand in the City of Appleton?

Select all that apply.

Check all that apply.

- [ ] Detached Single-family homes
- [ ] Middle Housing (townhomes, duplexes, triplexes, quadplexes)
- [ ] Apartments

10. What form of ownership is currently in highest demand in the City of Appleton?

Mark only one oval.

- House
- Condominium
- Other: _____

11. What form of occupancy (ownership or rental) is currently under-represented, given potential market demand in the City of Appleton?

Select all that apply.

Check all that apply.

- [ ] House - Ownership
- [ ] House - Rental
- [ ] Middle Housing - Ownership
- [ ] Middle Housing - Rental
- [ ] Apartment - Rental
- [ ] Other: _____

12. The College North Neighborhood Plan (link) was completed in 2022. In that plan a housing market study anticipates between 2,850-3,250 housing units (includes all housing types) were needed to meet the needs of the community (City of Appleton) between 2020 and 2030. Do you agree with this estimate?

Mark only one oval.

- Yes
- No
- Maybe

13. In order to achieve the anticipated future housing unit demands in the community by 2030, what type of housing should be prioritized in the City of Appleton?

Select all that apply.

Check all that apply.

- [ ] Detached single-family homes
- [ ] Middle Housing (townhomes, duplexes, triplexes, quadplexes)
- [ ] Apartments
- [ ] Other: _____

14. What barriers to development of housing-centric projects do you believe exist in the City of Appleton?

Select all that apply.

Check all that apply.

- [ ] Policy
- [ ] Approval Process
- [ ] Project Costs
- [ ] Financing
- [ ] Land Availability
- [ ] Environmental Conditions
- [ ] Community Push-back (NIMBY)
- [ ] Code Enforcement
- [ ] Other: _____

15. The College North Neighborhood Plan (link) included the following **owner-occupied** housing price point categories, how would you prioritize these in the City of Appleton?

Mark only one oval per row.

	1-highest priority	2	3	4	5-lower priority
Affordable Low: <$125,000					
Affordable Moderate: $125,000-$200,000					
Moderate market: $200,000-$250,000					
Market: $250,000-$400,000					
High Market: Over $400,000					

16. The College North Neighborhood Plan (link) included the following **renter-occupied** housing categories by monthly rent, how would you prioritize these in the City of Appleton?

Mark only one oval per row.

	1-highest priority	2	3	4-lower priority
Low: Less than $650				
Affordable: $650-$1,000				
Market: $1,000-$1,500				
High Market: $1,500+				

17. Are you aware that the City of Appleton allows new single family home subdivisions with fifty (50) feet wide lots (a historically typical width)?

Mark only one oval.

- Yes
- No

18. Are you aware that the City of Appleton does not have a maximum residential density in the CBD, C-1, and C-2 zoning districts?

Mark only one oval.

- Yes
- No

19. Please share any input or concerns regarding this matter.

20. Do you have interest in pursuing a housing project in the City of Appleton?

Mark only one oval.

- Yes
- No
- Maybe

21. If yes or maybe, please provide more details.

Optional.

Policy

Statutes, ordinances, zoning code, etc.

22. Has the City of Appleton, from a policy perspective, positioned itself to encourage housing-centric development?

Mark only one oval.

- Yes, keeping up with state and national changes
- Yes, but could do more
- Neutral
- No, but are trying
- No

23. Provide feedback.

Optional.

_____

24. How would you rate the accessibility (i.e. clarity and ability to comprehend) existing City of Appleton housing policies (e.g. statutes, ordinances, zoning code, etc.)?

Mark only one oval.

- Very Accessible
- Somewhat Accessible
- Not Accessible
- Not Applicable

25. Are you aware of the recent changes in housing policy to encourage housing-centric development?

Check all that apply.

Check all that apply.

- [ ] Zoning Code. Amended CBD zoning in 2018 to allow ground floor residential (except along College Ave.) and standalone residential development.
- [ ] Zoning Code. Updated the C-1 zoning district in 2020 to accommodate mixed-use infill and redevelopment.
- [ ] Quality of Life. Completed the Downtown Streetscape Design Guide in 2021 to inform decisions as street reconstruction projects occur.
- [ ] Zoning Code. Amended the C-1 Neighborhood mixed use district (increased lot coverage, reduced parking requirements, no maximum MF density, reduced setbacks, encourage parking to the rear of the buildings)
- [ ] Zoning Code. Accessory Dwelling Units are now allowed in residential districts.
- [ ] Zoning Code. Allow for zero lot line duplex in R-2 and R-3 zoning districts.
- [ ] Zoning Code. Increased density in the R-3 district.
- [ ] Zoning Code. Subdivision Code Chapter 17 –Change timeline for parkland dedication fee to be paid at time of building permit instead of prior to subdivision plat being signed.
- [ ] Zoning Code. There are no parking requirements in the CBD district, the C-1 district reduces the required parking by 50% and the zoning code allows for a 20% administrative parking reduction/adjustment in all districts.
- [ ] Plan. Completed College Avenue North Plan to reimagine this neighborhood and identify redevelopment opportunities. Market study completed to identify gaps in the housing market.
- [ ] Other

26. What is your preferred method to be and to stay informed on the City of Appleton housing policy updates (e.g. housing policy updates, zoning ordinance changes, available funding or tax incentives, plan updates, etc.

Check all that apply.

Check all that apply.

- [ ] Newspaper
- [ ] Television
- [ ] Social Media
- [ ] Trade Newsletters
- [ ] City of Appleton website
- [ ] Public meetings
- [ ] Other: _____

Funding

Incentives

27. Have you utilized any of the following to complete your project(s) in Appleton?

Check all that apply.

Check all that apply.

- [ ] Tax Increment Financing (TIF)
- [ ] American Rescue Plan Act (ARPA)
- [ ] Community Development Block Grant (CDGB)
- [ ] Wisconsin Economic Development Corporation (WEDC) Programs
- [ ] Wisconsin Housing & Economic Development Authority (WHEDA)
- [ ] PACE
- [ ] Other: _____

28. Was the City helpful to guide and advise in the use of incentives to assist in making your project feasible?

Mark only one oval.

- Very
- Somewhat
- Not helpful
- Not applicable

29. Are there incentive programs for housing development you've utilized in other Wisconsin communities that the City of Appleton should consider?

Please list or describe.

Processes

Project Submittal, Review and Approval (standard operating procedures, informal procedures) - this section applies to individuals and organizations who have gone through or are going through the municipal project approval process and is most likely to include developers and home builders.

30. Does the City of Appleton provide adequate resources (i.e. materials and communication) to navigate the various approval processes for housing-centric projects?

Mark only one oval.

- Yes
- No
- Somewhat
- Not Applicable

31. Are the necessary housing-centric project application forms readily accessible?

Mark only one oval.

- Yes
- No
- Somewhat
- Not Applicable

32. Are the housing-centric project approval timelines accurately communicated during the project submittal, review and approval process or when inquired upon?

Mark only one oval.

- Yes
- No
- Somewhat
- Not Applicable

33. Are the housing-centric project expectations clearly communicated by City of Appleton staff during the approval process?

Mark only one oval.

- Yes
- No
- Somewhat
- Not Applicable

34. Does the City designate a reliable and responsive point of contact for communication during the review and approval process of housing-centric projects?

Mark only one oval.

- Yes
- No
- Somewhat
- Not Applicable

35. If yes, what department did that person work in?

Select all that apply.

Check all that apply.

- [ ] Community and Economic Development Department
- [ ] Department of Public Works
- [ ] Fire Department
- [ ] Police Department
- [ ] Parks, Recreation, and Facilities Management Department
- [ ] City Attorney's Office
- [ ] Mayor's Office
- [ ] Other: _____

36. How would you rate the City of Appleton's responsiveness to general and/or complex inquiries related to housing-centric projects?

Mark only one oval.

- Very responsive
- Somewhat responsive
- Nuetral
- Not Responsive

37. Please provide any additional comments or concerns regarding the submittal, review and approval processes for housing-centric projects in the City of Appleton.

Recommendations for Improvement

Improve policy, create efficiencies in processes, and increase transparency in communication and expectations.

38. If you have completed, or are currently completing, a housing-centric project in the City of Appleton, please indicate if you've experienced any of the below during the project review and approval process.

Check all that apply.

- [ ] Vagueness or confusion regarding expectations
- [ ] Redundancy
- [ ] Lag time in responsiveness
- [ ] Other: _____

39. Do you have any recommendations to improve the City of Appleton housing-centric policy, processes, and/or communication?

These can include examples from other communities.

40. Any other comments.

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Stakeholder Engagement Plan

APPENDIX B

SUMMARY OF FINDINGS

Summary of Findings

A component of the Housing Development Policy Guide

The stakeholder engagement plan provided the framework for identifying key internal and external stakeholders and outlining engagement activities. Included in this section, is a synopsis of stakeholder engagement metrics, engagement activity processes, and feedback.

Stakeholder feedback from internal and external engagement activities was consolidated, evaluated, organized and taken into consideration with the information gleaned from the municipal policy and process review efforts to create draft recommendations and identify areas of focus, which are also included here.

Stakeholder Engagement

SUMMARY

STAKEHOLDER	ENGAGEMENT METHOD	AUDIENCE	TARGETED ENGAGEMENT	ACTUAL ENGAGEMENT
Internal	Online Survey	City Staff Members (21)	17 Respondents (85% ±)	17 Respondents (85% ±)
	Interview		3 Group Interviews	3 Group Interviews
External	Online Survey	Housing Market Business Experts & Community Leaders (94)	55-60 Respondents (60% ±)	53 Respondents (56% ±)
	Interview		4 Interviews	5 Interviews
	Focus Groups		3 Focus Group Meetings	3 Focus Group Meetings

Internal Stakeholder Engagement

GROUP INTERVIEWS

Group Interview Process & Information

Three Internal Stakeholder group interviews were conducted in-person during the stakeholder engagement period. City staff from the Community and Economic Development (CED) and Public Works Department (DPW) were requested to participate in the interview process. The groups, consisting of 2-4 participants each, combined CED and DPW staff with varied tenure and a range of professional experience, to facilitate meaningful conversation and feedback.

The initial interview structure was based on the questions and areas of interest outlined in the Internal Stakeholder Survey, however questions were adjusted during the interview process to be more conversational and conducive to a group setting.

Several topics of discussion were not directly related to housing, however based on feedback from Internal and External Stakeholders, a community that is encouraging of housing-centric projects and effectively communicates its policies and processes (internally and externally), is a community that is positively positioning itself for investment.

Individuals interviewed also had the opportunity to complete the Internal Stakeholder Survey, to provide additional feedback beyond what was included in the interview.

Interview feedback was combined with the feedback from other stakeholder engagement activities to form the Draft Recommendations and Areas of Focus to be considered by CED Staff and Taskforce members.

Internal Stakeholder Engagement

SURVEY

Respondent Information

- Approx. 36% of respondents have over 10 years of experience with the City.
- Approx. 75% of respondents have over 10 years of relevant experience.
- Approx. 67% of respondents have worked for a municipality or organization other than the City of Appleton.
  - Local, regional and national experience

Policy

- Top 3 ways policy changes are communicated: staff meetings, word of mouth and website
- Most, but not all, respondents were aware of recent policy changes to encourage housing development.
- 50% of respondents were unsure if their depts policies were available to other depts and the community,
- Respondents noted that policies are headed in the right direction to encourage housing development but are not well communicated/marketed.

Processes

- Approx. 67% of respondents noted there is not a specific point-person for the dept's role in the entitlement process or document that outlines the process for external stakeholders.
- 50% of respondents agreed they could convey accurately the appropriate entitlement process to a colleague or client, if inquired upon
- Respondents noted that policies should be made available across depts and reviewed for redundancies/conflicts
- Suggestions to improve communication included:
  - centralized policy and single-source technology
  - full entitlement process outlined with responsibilities/contacts. Make readily accessible.
  - annual refresh of policies and processes
  - consolidated location for forms, fees, guides with contacts on website
- Current processes to consider for improvement:
  - Plat Review Process
  - Rezone
  - Comp Plan Amendments
  - Internal meetings

Internal Stakeholder Engagement

SURVEY. Continued.

Collaborations

- Approx. 50% of respondents noted they interact with another dept on weekly basis for housing related projects and would categorize their interaction occurs on formal basis.
- Over 90% of respondents noted they were comfortable contacting another dept to discuss a housing related project.
- Only 33% of respondents agreed that the current internal structure for the entitlement process effective and beneficial.

Friction

- Vagueness & lag time were the leading areas of friction experienced by respondents.
- Specific examples of friction included:
  - code requirements vs. personal preference
  - lack of responsiveness when needed, which requires follow-up
  - lack of participation
  - inability to prepare for a meeting due to short timeline
  - vagueness when providing review comments and not sourcing specific code sections
  - inability to track where a project is in the review process due to outdated software and lack of procedures in place.

Recommendations for Improvement

- Respondents cited the following recommendations to improve City of Appleton policies, processes or communications for housing-centric projects:
  - Utilize project management software (upgraded technology) to better track the status of a project, forms and responsible parties
  - Inform and involve elected officials in development of policy, as well as the project entitlement processes
  - Re-structure the weekly meeting
    - Include site plan review, TRG and plat review
    - Prioritize projects base on interdepartmental collaboration
    - Offer virtual attendance
  - Update zoning and future land use map to encourage middle housing development
  - Interdepartmental coordination, review and approval when new policies and processes are development
- Inventory and audit of: code, policies, administrative rules, forms, contacts, etc.

External Stakeholder Engagement

INTERVIEWS

Interview Process & Information

Five External Stakeholder interviews were conducted during the stakeholder engagement period via Zoom and phone. CED Staff and Taskforce members selected individuals who represent diverse areas of expertise in housing-centric development and community leadership to be interviewed by GBC, which included:

- **Single-family subdivision developer & home builder**
- **Affordable housing developer**
- **Mixed-use & residential subdivision developer & home builder**
- **Non-profit director & community leader**
- **Faith & community leader**

The initial interview structure was based on the questions and areas of interest outlined in the External Stakeholder Survey, however interview questions were adjusted to be more in-depth and tailored to the individuals based on their areas of expertise and their work and/or involvement in the City and Fox Valley region. The interview process garnered varied, yet constructive feedback.

Individuals interviewed also had the opportunity to complete the External Stakeholder Survey, to provide additional feedback beyond what was included in their interview.

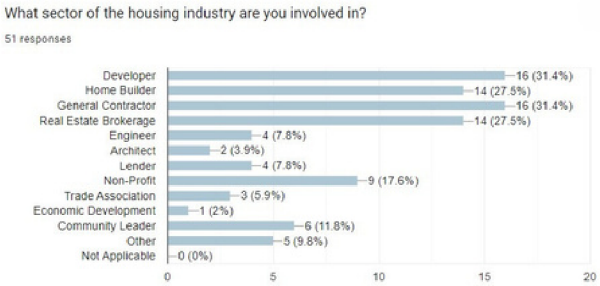
Interview feedback was combined with the feedback from other stakeholder engagement activities to form the Draft Recommendations and Areas of Focus to be considered by CED Staff and Taskforce members.

External Stakeholder Engagement

SURVEY

Respondent Information

- 53 survey respondents



- Approx. 73% of respondents have over 10 years of experience in the housing industry.
- Approx. 63% of respondents have or are in the process of completing a housing-centric project in Appleton.

Market Insight & Development Potential

- Based on responses, the housing type in highest demand & under-represented in the market: owner-occupied, detached single-family homes.
- Approx. 65% of respondents agreed with the College North Neighborhood Plan market study demand projection for 300 housing units annually 2020-2030.
- Top 3 housing types noted to prioritize to meet future housing needs: middle housing, detached single-family homes & apartments.
- Top 4 noted barriers to development: Project Costs, Approval Process, Land Availability & Community Push-back (NIMBY).
- Respondents cited prioritization of affordable housing (owner & renter-occupied) options over market & high market housing options.
- Approx. 61% of respondents are interested in pursuing a project in Appleton.

Policy

- Respondent awareness of the noted recent policy changes varied widely.
- City website and social media are the most preferred methods of staying informed of policy changes.

Funding

- Lower number of respondents have used an incentive tool for a housing project in Appleton.
- Notable respondent comments:
  - Public/Private Partnerships
    - Gap funding opportunities
  - TID Creation
    - Assistance for infrastructure costs
    - Development incentives
  - Lowering/waiving of fees & administrative costs

Processes

- Approx. 30-35% of respondents agreed (yes) that resources, forms & communication were accessible & adequate for their housing-centric project needs.
- Additional areas of processes-related feedback included:
  - Improve interdepartmental communication & review coordination
  - Maintain clear & consistent expectations between staff/review consultant & developer
  - Establish internal communication hierarchy

External Stakeholder Survey remained open to respondents until Tuesday, February 6, 2024.

External Stakeholder Engagement

FOCUS GROUP MEETINGS

Meeting Summary

Three External Stakeholder focus group meetings were conducted during the stakeholder engagement period. CED Staff and Taskforce members selected individuals who represent diverse, yet complementary areas of expertise in traditional and commercial housing development to participate in the focus group meetings (see below list of areas represented). Two, in-person meetings were held with experts in traditional, single-family subdivision development and home building. A third, virtual meeting was held with experts in the field of multi-family and affordable housing development and construction.

- **Single-family subdivision developers**
- **Commercial multi-family developers**
- **Home builders**
- **General Contractors**
- **Civil engineers**
- **Trade association representatives**
- **Lenders**
- **Commercial Brokers**

The initial intent of the focus group meetings was to inform attendees of the survey results (to-date) and present the selected greenfield, redevelopment and infill sites to facilitate a multi-disciplinary conversation around the development potential for the sites. It became evident during each meeting that participants were hesitant to provide development-related feedback and ideas, given the sites presented were privately-owned and some were in the process of being entitled for specific projects. However, conversations in regards to the impact of policy, process, and most importantly, communication, on the development process dominated each group. In that, the direction of the meetings pivoted to focus on how the City could better position itself to capture development by embracing problem solving, providing incentive programs and supporting projects throughout the entitlement process to lessen the burden of risk by developers and limiting the impact of community push back.

Individuals who participated in the focus group meetings were asked to complete the External Stakeholder Survey prior to the meetings. A follow up email with access to the survey was provided to meeting participants to encourage additional feedback, if they had not yet completed the survey.

Focus Group feedback was combined with the feedback from other stakeholder engagement activities to form the Draft Recommendations and Areas of Focus to be considered by City Staff and Taskforce members.

Draft Recommendations

Draft recommendations were created based on the internal and external stakeholder feedback from the various engagement activities.

1. Scheduled Review/Audit of Policy-related Materials
2. Policy Development & Implementation Procedures
3. Policy Intention & Communication/Marketing
4. Accessibility of Policy-related Materials
5. Scheduled Audit/Review of Website & Existing Informational Materials
6. **Project Point of Entry & Flow Chart**
7. Evaluation of Case Manager Role
8. Technology Utilization & Future Planned Upgrades
9. Subdivision Plat Review - Standard Operating Procedures/infographic
10. **ADU - Standard Operating Procedures/infographic**
11. Create a problem solving culture
12. Establishment of Internal Meeting Procedures
13. **Establish a vision for housing and make it happen**
14. Create plan to activate underutilized property for residential development
15. **Leverage the resources of the Appleton Redevelopment Authority (ARA) to incentivize housing development**
16. Regional perspective in developing & implementing housing-centric policy
17. Comprehensive approach for increasing future planned density
18. Advocate with WHEDA to expand program funding opportunities
19. Evaluate capacity, ability & desire to utilize TIF to incentivize housing development
20. Create an inventory of funding opportunities & utilization program
21. Establish clear & consistent communication internally & externally
22. Actively market pro-housing policy changes to community
23. **Education & communication of existing & future housing vision, policy & process changes to decision making bodies**
24. Simplify zoning code to encourage density and future land use map flexibility
25. Policy Development & Implementation Procedures
26. Community push back and NIMBY approach

Draft recommendations, bold text above, were identified as potential areas of focus. The following Areas of Focus section reflects the refined draft recommendations and further elaborates upon the associated areas of focus.

Areas of Focus

The draft recommendations and Areas of Focus were further refined and organized into five themes by GBC and presented to CED staff and Taskforce members for review.

1

Create a vision that encourages housing-centric development and investment and form policy that supports it.

- **Identify target areas or corridors for housing development and leverage policy and actionable steps to increase investment**
- Utilize a regional perspective in developing and implementing housing-centric policy
- Communicate future housing density intention to support internal decision making

TASK: Evaluate the alignment of the housing vision with comp plan, current land use, future land use and zoning materials

Wisconsin Avenue between Richmond Street & Meade Street

- Current site conditions
- Review comp plan, future land use, zoning
- Identify misalignments & opportunities

2

Encourage a positive development approval experience for housing-centric projects.

- **Create a project point of entry and entitlement flow chart**
- Audit of policy, process-related and published materials to ensure alignment and consistency
- Inventory and assess accessibility of policy, process-related and published materials
- Consider creating a Case Manager position to facilitate the entitlement process
- Better utilize existing technology across departments to increase efficiencies
- Prepare for future technology/software upgrades by formalizing processes and procedures
- Evaluate current internal meeting processes and their efficacy

TASK: Create an infographic that illustrates the development entitlement process

Plat Review Process

- Target audience: experienced/inexperienced developers, internal & external
- Responsible parties/depts & materials needed at each step

3

Encourage activation of existing housing-centric policy.

- **Create standard operating procedures for existing housing-centric policies**
- Evaluate the implementation and/or market impact potential during new policy development

TASK: Create infographic summary of the key Accessory Dwelling Unit (ADU) standard operating procedures elements

Accessory Dwelling Unit

- Educate what an ADU is, who might want one and how to do it
- Evaluate ideal situation/scenario to illustrate process
- Consider partnerships with local designers/builders
- Examples of ADU approvals/info from other locales

Areas of Focus

Continued.

4

Encourage a proactive approach to catalyzing housing-centric development and investment.

- **Leverage existing resources to incentivize housing development**
- Advocate to expand existing State funding opportunities
- Evaluate capacity, ability, and desire to utilize TIF to incentivize housing development
- Create an inventory of funding opportunities and develop a utilization program

TASK: Evaluate opportunities for the Appleton Redevelopment Authority to acquire and position sites for housing (re)development

Appleton Redevelopment Authority (ARA) Opportunities

- Current state of the ARA
- Areas for growth of services
- Example(s) of other Redevelopment Authorities
- Example of marketing materials for site redevelopment

5

Proactively engage with the community to better communicate changes to housing-centric policies and processes.

- **Regularly provide opportunities for staff to engage with elected and appointed officials to increase understanding of housing-centric policies and processes**
- Actively market pro-housing policy changes to the community

TASK: Example presentation of Plat Review Process for staff to utilize

Plat Review Process Presentation

- Overview of CED & DPW departments
- Summary of the plat review process
- Use as template for future process and/or policy updates

SCENARIO PLANNING EXERCISE

Innovative Guide Element

Considerations for repositioning P-I (Public-Institutional) sites for future housing redevelopment.

TASK: Evaluate the repositioning of land sites designated Public-Institutional for future housing opportunities.

Public-Institutional Repositioning Considerations

- Raze or Preserve
- Vision, Comp Plan, Land Use, Zoning
- Next Steps - Partnerships, Funding, Marketing
- Similar redevelopment project examples

Minor adjustments to themes, recommendations and areas of focus by GBC may occur as the final guide is assembled, with input from CED staff and Taskforce members during project updated meetings.

Summary of Findings

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