



# Vision 2025 Implementation Plan

Village of Shorewood

2015

This document is intended to outline actionable items and programs which have been identified through the Village of Shorewood's strategic planning process as being essential to the enactment of the Village's Vision 2025 Plan.

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“Visioning” is a term used to describe a strategic planning process that develops an image of what a community would like to be in the future and an implementation plan to get it there. In conjunction with the Village’s strategic financial planning initiatives, Shorewood actively participates in operational strategic planning processes. These processes ensure that the quality of life desired and provided through Village operations is also fiscally responsible and sustainable.

Village residents, businesses, staff and elected officials continuously strive to improve the Village of Shorewood. The elected body and staff of the Village work diligently to ensure that every effort is made to provide the community with what it wants and needs at the greatest possible value. As financial and operational challenges grow, Village staff and officials grow with them. Village governments throughout the region are working to share services, combine services and share knowledge to overcome challenges in all areas. Dedicated staff, knowledgeable and progressive elected officials and strategic planning efforts are invaluable in the battle for progress in an ever-changing world.



## 2.0 Purpose

This document is intended to outline actionable items and programs which have been identified through the Village of Shorewood's strategic planning process as being essential to the realization of outcomes contained in the Village's Vision 2025 Plan. This Plan consists of nine (9) vision statements compiled from interactions with the community, staff and elected officials which illustrate how the community sees itself in the year 2025. Along with these vision statements are goals which can be used to measure progress as well as to formulate strategies and tactics which may be utilized to reach these outcomes.

This document will help to communicate the history of the planning process and how the community's vision has been shaped. This is supplemental to the Vision 2025 Plan itself, but further outlines the process the community, staff and elected officials have undertaken to put this plan in motion to reach their goals. The Vision 2025 Implementation Plan is meant to serve as the operational document with which Village staff and elected officials will execute the tactics herein to ultimately reach the community's vision of its future.

Strategic planning is a cyclical process. The Village's Vision 2025 plan picks up where the Vision 2015 plan left off and will culminate in a new planning process carrying the Village even farther in the future. To facilitate the change needed to improve and reach the goals in the Vision 2025 plan, it will be necessary to assess each step, devising metrics to measure improvement and completion of selected items. This is a process of continuous improvement. It will require the combined efforts of all involved to execute, evaluate and proceed to the next step on all counts.

Staff has assembled an 18-month plan to begin implementing the initiatives indicated in the Vision 2025 plan. The 18-month implementation month is included in the appendix of this document. Staff will continually update the document annual and inform the Village Board of their implementation process as the plan is updated.

## 3.0 History

***Where are we now?  
Where are we going?***

***Where do we want to be?  
How do we get there?***

In 2005, the Village of Shorewood Board of Trustees undertook its first Village-wide visioning project with assistance from Public Management Partners LLP. Using US Census data from 2000 and other available information regarding Shorewood, these parties were able to answer the essential four questions above culminating in the Village's Vision 2015 plan.

In 2009, the Board reviewed the vision statements and revisited the implementation plan through a condensed process which updated the implementation plan but retained the vision statement. As the Vision 2015 plan was being implemented with great success, it became necessary to consider another round of strategic planning in order to continue long-lasting improvement.

In 2013, Public Management Partners, LLP returned to facilitate a village-wide visioning project that used data from the 2010 US Census and the American Community Survey 2007-2011 (5-Year estimates conducted by the US Census Bureau). Information was reviewed and included from the Village's current Comprehensive and Vision Implementation plans, survey results from a 2013 community-wide survey, resident entrance/exit surveys and a variety of other relevant information. This allowed for a very broad understanding of the Village's baseline after improvements made following the implementation of the Vision 2015 plan.

The Village then collected community input from five (5) focus groups and one (1) open-invitation community workshop to search for trends or issues that might not yet be observable as well as to test the community's understanding of retail market realities. This was a great opportunity to hear from residents and gather ideas for the future of the Village as well as data which could be included.



The Village Board, Manager and Department Heads met to develop vision statements and implementation plan goals and strategies. Public Management Partners, LLP assisted the Village Manager and staff in developing objectives and tactics to implement the Village Board's 2025 Vision. After additional community input, the Board adopted the Vision 2025 Plan.

## 4.0 Vision Statements and Goals

As a part of the visioning process, participants were asked to conceptualize what the Village of Shorewood would look like in the year 2025. This was meant to provide concrete outcomes to which goals could be formulated and vision statements could be more readily visualized. As a result, the following outcomes (vision statements) were identified by participants. These are supplemented by goals which will assist in the implementation of tactics to obtain the desired outcomes:

### ***In 2025, Shorewood will be:***

#### ***A vibrant urban community with:***

- ***Safe, friendly neighborhoods offering desirable housing options that attract diverse people of all ages and stages of life;***
  - ✓ Goal: Be the safest urban Milwaukee suburb.
    - i. Provide proactive and responsive police services
    - ii. Provide proactive and responsive fire and emergency medical services
    - iii. Engage the community in creating safe homes, neighborhoods and business environments
  - ✓ Goal: Be the urban Milwaukee suburb with a reputation for friendly and welcoming neighborhoods
    - i. Increase Shorewood's social capital within neighborhoods, the Village and the region
  - ✓ Goal: Lead the region in providing a variety of desirable housing options
    - i. Protect and add to the number of architecturally pleasing residential exteriors
    - ii. Protect the structural integrity of all housing units
    - iii. Diversify types of housing units
    - iv. Encourage market-appropriate interior improvements in older housing units
    - v. Encourage renovation/replacement of sub-standard housing units
    - vi. Minimize code and process impediments to property maintenance
- ***Opportunities to work in and to grow successful profit and non-profit businesses in and near Shorewood;***
  - ✓ Goal: Develop/support businesses in/near Shorewood that improve the economic health of Shorewood and the Milwaukee metro area
    - i. Retain, attract and develop successful businesses
  - ✓ Goal: Develop/support non-profit business and institutions in/near Shorewood
    - i. Develop partnerships that will support successful cultural institutions
    - ii. Develop partnerships that will support successful educational institutions
  - ✓ Goal: Support start-up and permitted home-based businesses
    - i. Encouragement development of appropriately supportive spaces
    - ii. Support artists with storefront retail potential
- ***Attractive and thriving local service, retail, and hospitality businesses;***
  - ✓ Goal: Increase number of jobs and total sales
    - i. Increase inventory of market-appropriate business spaces
  - ✓ Goal: Help drive customer traffic to businesses
    - i. Market Shorewood to potential customers
    - ii. Increase convenient access to businesses

- ***Excellent local schools and easy access to world-class centers of culture and higher education;***
  - ✓ Goal: Be an educated and culturally aware community where people want to live
    - i. Develop lifelong learning opportunities and programs in/near Shorewood
    - ii. Support local public and private school success
  - ✓ Goal: Invest in multi-modal transportation infrastructure meets transportation needs.
    - i. Invest in local transportation infrastructure tied to regional systems
    - ii. Provide safe, well-maintained streets
    - iii. Provide a variety of strong alternative transportation options
  - ✓ Goal: Be a leader in the use of non-auto transportation methods
    - i. Brand the Village as a community whose residents, businesses and visitors extensively use non-auto transportation
    - ii. Promote use of bicycles
  
- ***Strong multi-modal transportation infrastructure that meets transportation needs.***
  - ✓ Goal: Invest in multi-modal transportation infrastructure that meets transportation needs.
    - i. Invest in local transportation infrastructure tied to regional systems
    - ii. Provide safe, well-maintained streets.
    - iii. Provide a variety of strong alternative transportation options
  - ✓ Goal: Be a leader in the use of non-auto transportation methods.
    - i. Brand the village as a community whose residents, businesses, and visitors extensively use non-auto transportation
    - ii. Promote use of bicycles

***A welcoming community embracing new people, innovative ideas and engaging with others to continuously improve Shorewood and the Milwaukee metro area***

- ✓ Goal: Be a welcoming community
  - i. Welcome all newcomers to Shorewood
  - ii. Market Shorewood to targeted demographics
- ✓ Goal: Offer and celebrate opportunities to connect with and serve others
  - i. Facilitate neighbors getting to know each other
  - ii. Encourage participation in community activities and organizations
- ✓ Goal: Be a regional leader in innovation and creative initiatives
  - i. Test new and innovative ideas designed to improve Shorewood and the Milwaukee metro area

***A healthy community with clean air and water; access to excellent medical services; and businesses, facilities, spaces, and programs that promote personal health and wellness***

- ✓ Goal: Rank at the top of comparably-sized Wisconsin communities as measured by public health and personal wellness indicators.
  - i. Develop clean air and water policy and programs to improve local air and water indices
  - ii. Reduce number of air quality watches and advisories
  - iii. Support and expand access to high quality medical facilities & services
- ✓ Goal: Promote personal health and wellness
  - i. Recruit businesses and non-profits catering to personal health and wellness
  - ii. Expand public recreation amenities (parks and recreation programs)
  - iii. Promote proper use/disposal of prescription drugs

***An ecologically-responsible community with an appreciation for the lake, river, and other natural areas and a commitment to sustainability***

- ✓ Goal: Rank at the top of comparably sized Wisconsin communities when measured by formally developed standards of ecological practices
  - i. Develop policies and practices to support Shorewood's sustainability plan

- ✓ Goal: Residents are actively engaged in utilization and stewardship of the lake, river and other natural areas
  - i. Promote ecological awareness
  - ii. Promote use of lake, river and natural areas

***A financially responsible community with suitable and well-maintained public buildings and infrastructure, strong property values, a competitive tax rate, and a commitment to public service excellence***

- ✓ Goal: Be a financially responsible community
  - i. Integrate financial management with community needs to increase market value of real estate
  - ii. Deliver efficient and effective municipal services
- ✓ Goal: Serve the community with well-maintained public buildings and infrastructure
  - i. Maintain capital improvement and maintenance plan that provides a sustainable, “Steady state” annual commitment

***A well-governed community with leaders and citizens who value broad civic participation and maintain a long-range, disciplined view of the future***

- ✓ Goal: Commit to open and interactive involvement of all residents and property owners in civic responsibilities
  - i. Establish effective communication tools and methods
  - ii. Assure effective committee & commission participation
  - iii. Assure effective participation thru leadership development
- ✓ Goal: Regularly develop and update long range plans that have had leaders and citizens participating in the process
  - i. Maintain commitment to annual plan development process

## 5.0 Committees and Recommendations

### 5.1 Overview

After the preparation and adoption of the Vision 2025 Plan, it became apparent that the most constructive process for implementing it would be to go back to the community for input and ideas. To accomplish this, members of the community from all backgrounds were asked to participate in a six (6) month committee-based project. The Vision Plan 2025 was then broken-down into seven (7) focus areas with Department Heads assigned to these areas based on their expertise. Chair and Co-Chair responsibilities were given to these Department Heads and the recruitment process for community members and specialists began. The following sections detail the committees that were formed, the members and specialists involved and their detailed findings.

### 5.2 Business and Housing Development

The purpose of the Committee on Business and Housing Development was to find innovative ways in which to attract new businesses and development, maintain positive relationships with businesses, ensure proper maintenance for existing housing stock, and attract people to live and work in Shorewood and to generally promote Shorewood to existing and potential residents both commercial and otherwise. The table below conveys this committee's recommendations and timeline in which it is believed these recommendations may be implemented. These are coupled with the corresponding Vision statements.

| Business Development Committee Recommendations   |                           |   |
|--|---------------------------|---|
| <i>"In 2025 Shorewood will be a vibrant urban community with opportunities to work in and grow successful profit and non-profit businesses in and near Shorewood."</i> |                           |   |
| Recommendations  | Projected Completion Date | Notes   |
| <b>Create a Commercial Branding Program and Attract Businesses</b>   |                           |   |
| Label vacant commercial spaces on building façade directing people to more information   | 18 Months                 |   |
| Maintain current and comprehensive vacancy list on BID website   | 18 Months                 | Outreach to owners with long-term vacancies. Identify reasons for vacancy                         |
| Work with commercial building owners in tenant recruitment to decrease vacancies   | 18 Months                 |   |
| Explore criteria for historic building maintenance   | 2-3 Years                 |   |
| Recruit local restaurateur groups  | 18 Months                 | Current outreach through General Capital Group; special committee led by CDA, staff and residents |
| Survey Business Owners   | Ongoing                   |   |
| Understand Shorewood lease rates to region and impact on business recruitment, retention and growth  | 2-3 Years                 |   |
| Evaluate current business mix and demand for local, regional and national presence   | 2-3 Years                 | Identify destination businesses   |
| Encourage businesses that serve daytime customers  | Ongoing                   | Target recruiting for new office buildings and/or corporate headquarters                          |
| Focus on attracting businesses that provide living wage jobs   | 2-3 Years                 |   |
| Encourage businesses to own commercial property  | 3-4 Years                 |   |

| Coop with other business districts  | 3-4 Years                 | Target key demographics  |
|---|---------------------------|--|
| Recommendations   | Projected Completion Date | Notes  |
| Establish Farmers Market  |                           |  |
| Create exploratory committee to establish farmers market                      | 1-2 Years                 | <b>Completed in 2015</b>   |
| Transportation Improvements   |                           |  |
| Review 10 minute parking restrictions in 2200 block of E Capitol              | 18 Months                 |  |
| Evaluate current and future impact of Wilson Dr. on customer attraction       | 2-3 Years                 | Evaluate how corridor can better serve bicyclists; Opportunities for Estabrook Homes apartment owner to market to trail users  |
| Improve connections within commercial districts                               | 2-3 Years                 | Evaluate transportation methods for getting patrons around district without driving own vehicles and evaluate frequency; Improve bicycle connections, evaluate nodes for bike lanes and green boxes. |
| Add street parking  | 2-3 Years                 | Evaluate areas suitable for angled parking   |
| Improve Oakland and Kensington intersection                                   | 18 Months                 | Traffic study  |
| Evaluate feasibility of live-work models                                      | 18 Months                 | Research various models such as ArtSpace, Park East Enterprise Lofts, Milwaukee Home, Evaluate zoning  |
| Continue to improve parking in commercial areas                               | 3-4 Years                 | Provide shuttle service for employee parking to free up the street   |
| Encourage transit use   | Ongoing                   | Evaluate bus stop locations that would fit addition of bus shelters; develop plan for implementation   |
| Investigate providing express bus from Shorewood to downtown Milwaukee        | 18 Months                 | Evaluate providing for signature events, survey if demand for daily commute.   |
| Business Amenities  |                           |  |
| Assist with creating local crowd source funding for new or growing businesses | 18 Months                 | Develop committee to explore   |
| Explore demand for business incubator or lounge/shared office space           | 18 Months                 | Establish committee to explore and research current examples; Gather information on existing businesses; Create networking event   |
| Evaluate current and relevant events  | 2-3 Years                 | Identify events that focus on economic development and are hyper-local; Identify next wave of business practices   |
| Strengthen visual identity of commercial district                             | 2-3 Years                 | Explore naming different district nodes aligning with general usage; Identify ways to physically mark businesses participating in events   |
| Explore enhancing High School green space                                     | 3-4 Years                 | Work with High School to add public plaza at Oakland/Capitol; Add landscaping to soften lawn; Identify potential utilizations  |

**Housing Development Committee Recommendations**

***“In 2025 Shorewood will be a vibrant urban community with safe friendly neighborhoods offering desirable housing options that attract diverse people of all ages and stages in life.”***

| Recommendations   | Projected Completion Date | Notes  |
|---|---------------------------|--|
| <b>Property Development and Maintenance</b>   |                           |  |
| Support new development that attracts/retains Baby Boomers and young professionals  | 18 Months<br>Ongoing      | Market to development community; targeted marketing  |
| Evaluate current housing conditions and match to market demands for families  | 18 Months                 | Evaluate neighborhood improvement loan program match to current market   |
| Continue Village’s established proactive property enforcement and pre-sale inspections for all properties                               | 2-3 Years<br>Ongoing      | Determine how to continue implementation despite State law   |
| Enhance Annual landlord training event by including what the Village is doing. (Current program focuses only on tenant/landlord rights) | 2-3 Years                 | Educate duplex owners on rental market demand and importance of updating/ maintaining properties; Educate landlords about forming a coalition for understanding and responding to the market   |
| Evaluate impact of increased rental units on enrollment in Shorewood Schools  | 2-3 Years                 | Complete a study   |
| Evaluate policy on razing homes   | 2-3 Years                 | Evaluate zones that could be designated for re-development; Evaluate incentive program for attracting families to purchase homes in need of major renovations; Evaluate creating preservation districts  |
| Identify ways to improve neighborhoods  | 18 Months                 | Increase owner-occupied duplexes; Implement a rental inspection program  |
| Revisit creating a Neighborhood Improvement District within the Commercial District   | 2-3 Years                 |  |
| Evaluate feasibility of market for micro-housing  | 2-3 Years                 |  |
| Create Historical Districts   | 18 Months                 | Work with the Historical Society to re-evaluate historic districts   |
| <b>Transportation</b>   |                           |  |
| Continue with Village parking regulations that assist in curtailing overcrowding in rentals   | 2-3 Years<br>Ongoing      |  |
| Promote and improve multimodal transportation   | 18 Months<br>Ongoing      | Enhance awareness of Uber and Lyft services; Zipcar; Explore demand for a Downtown Milwaukee shuttle service; Implement bike share program; Improve bus stops; Partner with local government/ Organizations for increased awareness and educate community on accessibility to all modes of transportation. |
| <b>Community Improvement</b>  |                           |  |
| Evaluate aging housing stock and effect on aging in-place   | 2-3 Years                 | Understand impact of Shorewood Connects Programs and Elder Service Advisory Board priorities; Identify alternative housing demand  |
| Explore ways to increase diversity in the community   | 2-3 Years                 | Evaluate attracting workforce housing development  |

|  |  |  |
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❖ **Business and Housing Development Committee Members:**

- |                       |  |                 |
|-----------------------|--|-----------------|
| ○ Chris Swartz        | Village Manager                        | <i>Chair</i>    |
| ○ Ericka Lang         | Planning and Development Director      | <i>Co-Chair</i> |
| ○ Jim Plaisted        | Business Improvement District Director |                 |
| ○ Sig Strautmanis     | General Capital Partner                |                 |
| ○ Stephanie Sherman   | Local Entrepreneur                     |                 |
| ○ Mike Dawson         | Resident                               |                 |
| ○ Cathy Rapp          | Real Estate Broker                     |                 |
| ○ Allison Rozek       | Business Owner- Swanky Seconds         |                 |
| ○ Dr. William Holahan | Professor of Economics                 |                 |
| ○ Leonard Sobjck      | Real Estate in Shorewood               |                 |
| ○ John Heinen         | Resident                               |                 |
| ○ Juli Kaufman        | Real Estate Developer                  |                 |
| ○ Kevin Schmoldt      | Commercial Real Estate Broker          |                 |
| ○ Tammy Bockhorst     | Village Trustee                        |                 |

### 5.3 Communications and Community Spirit

In addition to identifying recommendations to further the Village towards its goals as outlined in the Vision 2025 Plan, this committee came up with the following “Ways to Experience the Village of Shorewood” list:

There is so much to do in Shorewood. We’ve created a “bucket list” of ideas that highlights a variety of fun activities. Use this list to help you decide which of the many experiences you want to have during your visit. You will never run out of options, this list is only a start! As you travel the Village, check off the ones you’ve completed.

1. Enjoy panoramic views of the lake front
2. Take in the captivating sight of a fabulous sunrise or sunset at Atwater Park
3. Shop the day away at a number of shops and boutiques
4. Rest, relax and rejuvenate at a spa
5. Spend a leisurely day of fun in the sun at Atwater Beach
6. Bike the Oak Leaf Trail
7. Attend a free, outdoor community concert
8. Obtain a map and complete the tree walk
9. Satisfy your sweet tooth at an ice cream shop or confectionary
10. Grab a cup of fresh brewed coffee and cozy up with a good book at a café
11. Take in the vibrant fall colors during a hike at Hubbard Park
12. Enjoy a picnic as you relax on the beach or in the park
13. Check out the nightlife in venues that range from cozy to lively pubs and taverns
14. Awaken your taste buds and delight your senses with a meal from a variety of venues
15. Relax at the Beer Gardens located in Hubbard and Estabrook Parks
16. Visit the Live Wall greening system located on the side of the Village Center
17. Participate in or attend the Criterium Bike Races
18. Watch an artist work during Plein Air Shorewood
19. Attend the Shorewood Men’s Club Annual Chicken BBQ at Atwater Park
20. Paddle and play on Atwater Beach during the Surf@water event
21. Sit on a bench in Hubbard Park and watch the Milwaukee River flow by
22. Search for one of the many geocaches hidden in Shorewood
23. Follow the Nature Preserve Path down to Lake Michigan
24. Catch a little league game at Spector Field
25. Watch some of Shorewood’s youngest play soccer at the field in River Park
26. Go for a swim at the VHE pool on the Shorewood High School Campus

27. Watch the world pass by with a cold beverage on the outdoor patio of one of the many restaurants
28. Sit in a quiet corner of the library and read or catch-up on e-mail
29. On a dark night, visit Atwater Park to see the glow of the Plensa sculpture
30. Grab a partner and a racket and head to Shorewood Intermediate School for a game of tennis
31. Bring your favorite canine to the Estabrook Dog Park
32. Take a walk down by the river following the river walk on Oak Leaf Trail
33. Spend the 4<sup>th</sup> of July watching the parade, participating in activities in River Park and end it at Atwater to listen to live music and watch the fireworks
34. Help older disabled residents during the “Yard Clean-up Days” on the first Saturday in November and the Second Saturday in May
35. Walk everywhere in Shorewood, it’s only 1 ½ miles in total area
36. Catch-up on Village history, read the glass plates in the Walgreen’s parking garage
37. Take a “selfie” in front of an iconic Shorewood building

The Committee also began to identify a system to communicate information based on priority using the current communication tools available to staff. While the listing given here is a draft, it provides much-needed perspective on how the Village may more effectively and consistently communicate with citizens regarding a varying range of topics.

### Communication Levels

#### High Priority

| How:   | Examples:  |
|--|--|
| <input type="checkbox"/> Direct Mail-To the entire Village or specific areas | <input type="checkbox"/> Emergency Information-Effecting all residents |
| <input type="checkbox"/> Manager’s Memo or special E-blast                   | <input type="checkbox"/> Rate Increases                                |
| <input type="checkbox"/> School District Weekly E- Newsletter                |  |
| <input type="checkbox"/> Police Department-Nixle                             |  |
| <input type="checkbox"/> All Social Media outlets                            |  |
| <input type="checkbox"/> Website Newsfeed Posts                              |  |
| <input type="checkbox"/> Robocalls through the School District               |  |
| <input type="checkbox"/> Information Board at the Library                    |  |
| <input type="checkbox"/> Utility Bills (If timely and appropriate)           |  |
| <input type="checkbox"/> Shorewood Today Magazine (if timely)                |  |
| <input type="checkbox"/> Press Release (if appropriate)                      |  |
| <input type="checkbox"/> Library E-Newsletter (if Appropriate)               |  |

#### Mid-Level Priority

| How:   | Examples:   |
|--|---|
| <input type="checkbox"/> Manager’s Memo                            | <input type="checkbox"/> Village Social Events (4 <sup>th</sup> of July, Plein Air, etc.) |
| <input type="checkbox"/> School District Weekly E- Newsletter      | <input type="checkbox"/> Updates on building projects                                     |
| <input type="checkbox"/> Library E-Newsletter (if appropriate)     | <input type="checkbox"/> Elections  |
| <input type="checkbox"/> Flyers/Posters at Key area Businesses     | <input type="checkbox"/> Contests   |
| <input type="checkbox"/> All Social Medial Outlets                 | <input type="checkbox"/> Street Construction  |
| <input type="checkbox"/> Website Newsfeed Posts                    |   |
| <input type="checkbox"/> Shorewood Today Magazine (if timely)      |   |
| <input type="checkbox"/> Information Board at the Library          |   |
| <input type="checkbox"/> Utility Bills (If timely and appropriate) |   |
| <input type="checkbox"/> Shorewood Today Magazine (if timely)      |   |

#### Low Priority

| How:  | Examples                                       |
|---|--|
| <input type="checkbox"/> Manager’s Memo                   | <input type="checkbox"/> Tax Payment Reminders |
| <input type="checkbox"/> Shorewood Today Magazine         | <input type="checkbox"/> Future Planned Events |
| <input type="checkbox"/> Information Board at the Library |  |
| <input type="checkbox"/> All Social Medial Outlets        |  |
| <input type="checkbox"/> Website Newsfeed Posts           |  |

|   |  |
|---|--|
| ○ Utility Bills (If timely and appropriate) |  |
|---|--|

The table below conveys this committee’s recommendations and timeline in which it is believed these recommendations may be implemented. These are coupled with the corresponding Vision statements.

| <b>Communications and Community Spirit Committee</b>   |                                  |  |
|--|----------------------------------|--|
| <b><i>“In 2025 Shorewood will be a well governed community with leaders and citizens who value broad civic participation and maintain a long-range, disciplined view of the future.”</i></b> |                                  |  |
| <b>Recommendations</b>   | <b>Projected Completion Date</b> | <b>Notes</b>   |
| <b>Market the Village</b>  |                                  |  |
| Promote Shorewood’s brand and active lifestyle options including promoting Library/Fitness Center, bike paths and Rec department   | 18 Months<br>Ongoing             | Use Shorewood Today Magazine to promote; Identify key contacts at Library/Fitness Center as information source; Determine appropriate distribution method (written, online, etc.)                                    |
| Encourage young professionals to move to Shorewood by networking   | 18 Months<br>Ongoing             | Advertise in professional magazines; Make contact with HR managers; utilize NEWaukee   |
| Engage Milwaukee County realtors about marketing Shorewood   | 18 Months<br>Ongoing             | Prepare succinct documents for distribution; Host a semi-annual or annual event with realtors; Make contact with realtors group marketing coordinator to schedule conversation                                       |
| <b>Communicate Neighborhood Items</b>  |                                  |  |
| Encourage block parties and neighborhood associations; Update application to ask to include others “outside” their neighborhood  | 18 Months                        | Place toolkit online; Advertise in Shorewood Today Magazine and Manager’s Memo; Provide application at various locations; Hold neighborhood get-togethers and informational meetings. Invite Village Staff to attend |
| Increase participation in the Neighborhood of the Year Program   | 18 Months                        | Notify current or previous year block party captains; Include application with current block party approval letter/email and allow them to submit immediately  |
| Encourage front yard gardens and “Featured Garden” articles in publications  | 2-3 Years                        | Establish guidelines for gardens; Use communication tools to share guidelines with the community; Allow residents to submit a garden on the website for consideration; Spotlight in marketing materials              |
| <b>Use Businesses, Schools and Residents to Disseminate Information</b>  |                                  |  |
| Quarterly community calendars available through local businesses and distributed at all events   | 2-3 Years                        | Determine central “hub” for information; Make contact with local businesses and identify possible locations for kiosks; Recruit members of the business community to help distribute information                     |

| Recommendations  | Project Completion Date | Notes   |
|--|-------------------------|---|
| <b>Use Businesses, Schools and Residents to Disseminate Information</b>  |                         |   |
| Encourage local businesses to distribute community calendars/info; Maybe via placemats                                     | 18 Months               | Approach BID to request local businesses to participate; Investigate possible incentives to participate (i.e. discounted ad in Shorewood Today); Work with Shorewood Press or other entity to provide discounted printing services  |
| Connect with other community groups to get our information on their website  | 18 Months               | Identify community groups with websites and their “webmaster”; Request to include Village information and/or links on their website or social media   |
| Identify key communicators/residents to help get the message out. Use connections  | 18 Months<br>Ongoing    | Identify residents with a blog or Facebook account, etc. who would be willing to use their account to share Village information or direct people to the Village website; Include question in the upcoming Village survey to identify best sources of information for residents; Meet with key communicators either regularly or as needed to share information. Have a Shorewood Village booth at the new Farmers Market and other large events |
| Additional message boards at prominent locations in the Village; Work with local businesses to display public kiosks, etc. | 3-4 Years               | Intersection of Capitol and Oakland or entrance to Village on Estabrook Park side; Identify areas that could serve as locations for message boards, additional TV monitors. Identify businesses that may host a message board or kiosk.   |
| <b>Website and Village Manager’s Memo</b>  |                         |   |
| Online suggestion box on the Village website   | 18 Months               | Determine if possible/useful; Identify who will be responsible for managing   |
| Combined, searchable events website calendar   | 18 Months               | Determine feasibility; Identify sources for calendar information; Create policy regarding calendar content; Determine managing entity; Online submission form or citizen event submission   |
| Encourage residents to sign-up for the Manager’s Memo-Use other entity’s contacts  | 18 Months<br>Ongoing    | Include information in water bills, school correspondence, library newsletter; Hold a “What’s Your Favorite Thing About Shorewood” contest with a prize.  |
| List all community activities on the Village website   | 18 Months               | Already completed. Provide mechanism to relay activities to Village staff-Determine how often to update; Find out what’s going on in the Village and provide a link   |

| Recommendations   | Project Completion Date | Notes   |
|---|-------------------------|---|
| <b>Website and Village Manager's Memo</b>   |                         |   |
| Promote current online swap meets and "free"-cycling  | 2-3 Years               |   |
| Change formatting of Manager's Memo and articles to encourage more opens  | 18 Months               | More Pictures; More interesting titles; Less repetitive articles; Use links for articles instead of printing entire article.  |
| <b>In-Person Communications</b>   |                         |   |
| Personal welcome to new owners and renters. Deliver welcome packets by mail or in-person. Make available to rental property managers and owners | 18 Months               | Develop neighborhood "Ambassador" program; Determine a way to locate all new residents (especially those without ties to the School District)   |
| Hold neighborhood get-togethers and informational meetings facilitated by Village staff or Board members  | 18 Months               | Staff could visit block parties (coordinate with captain) to discuss specific neighborhood issues; Create Citizen's Academy; Can use Academy as a source for identifying "Ambassadors"-Hopefully encourage citizen involvement and engagement |
| <b>Miscellaneous Communications Items</b>   |                         |   |
| Make the School District a focal point for marketing  | 18 Months Ongoing       | Highlight School District in Village Communications   |
| Support the High School Art Show  | 18 Months Ongoing       | Use the Villages communication tools to market and allow art to be displayed in Village spaces  |

❖ **Communications and Community Spirit Committee Members:**

- |                      |                             |                 |
|----------------------|-----------------------------|-----------------|
| ○ Diane DeWindt-Hall | Customer Service Director   | <i>Chair</i>    |
| ○ Sherry Grant       | Village Clerk               | <i>Co-Chair</i> |
| ○ Beth Carey         | Library Director            | <i>Co-Chair</i> |
| ○ Sue Kelley         | Shorewood Connects Director |                 |
| ○ Patrick Bieser     | Resident                    |                 |
| ○ Kevin Paterka      | Resident                    |                 |
| ○ Saj Thackenkary    | Resident                    |                 |
| ○ Debbie Eder        | Resident                    |                 |

## 5.4 Governance and Public Services

The purpose of the Committee on Governance and Public Services was to identify new ways in which the Village may be effective in communicating governmental information to the population and extracting a higher level of community involvement in decision making processes and to identify ways in which the Village may become more fiscally competitive and lean while continuing to provide the highest possible levels of service.

**Governance and Public Services Committee**

***“In 2025 Shorewood will be a well governed community with leaders and citizens who have broad civic participation and maintain a long-range, disciplined view of the future.”***

***“In 2025 Shorewood will be a financially strong community with sustainable and well-maintained public buildings and infrastructure, strong property values, a competitive tax rate and commitment to public service excellence.”***

| Recommendations   | Project Completion Date | Notes  |
|---|-------------------------|--|
| <b>Utilize Marketing and Communications to Better Inform and Communicate to the Public</b>  |                         |  |
| Develop a formal communication process to establish minimum guidelines for disseminating information to the community                         | 18 Months<br>Ongoing    | How will information be shared to various stakeholders for different types of meetings/activities/actions? Provide meaningful summary info for residents on items. Have a consistent communication process; work with Marketing Team |
| Develop citizen interest groups/lists to target specific issue-related topics   | 18 Months<br>Ongoing    | Utilize website interaction capabilities; Provide information on how to join interest groups; Citizen surveys-activity based; Pod cast meetings, solicit questions prior to or during meetings                                       |
| <b>Providing Resources to Help Residents Learn How They Can Participate in the Civic Process</b>  |                         |  |
| Define steps in each process and opportunities for different types of input   | 18 Months               | Create ongoing meeting/project activity lists and schedules which are accessible to residents; Create a conduit page “How can I get involved?”; Create a civic participation handbook; Develop a volunteer recruitment process       |
| Facilitate participation in the process outside of scheduled meetings   | 18 Months<br>Ongoing    | Establish resident panels/forums; Solicit questions from the public; Opportunities to present specific feedback  |
| Establish a process to engage additional community participation for civic leadership development and recruitment; (i.e. “Citizen’s Academy”) | 18 Months               | Provide monthly planning updates; Facilitate ability to subscribe to planning updates  |
| <b>Provide Improved Access and Context to Existing and Future Planning Documents</b>  |                         |  |
| Consolidate and categorize the planning documents in a single place easily accessible to the public   | 18 Months               | Consolidate and make concise “quick looks” descriptions/introductions  |
| Prepare summary overviews of documents for citizen review   | 18 Months               |  |
| Maximize community outreach opportunities   | 18 Months<br>Ongoing    | Bike race, 4 <sup>th</sup> of July, etc.   |
| Electronic/Interactive kiosks in key locations  | 2-3 Years               |  |
| <b>Hold Community Meetings to Discuss General Planning Issues</b>   |                         |  |
| Hold meetings to get input on general issues that could be discussed  | 18 Months               | Facilitate 2-way communication and input   |
| Consider quarterly weekend meetings/ Other open forums  | 18 Months               | Create Committee leadership group to share goals   |

| Recommendations  | Project Completion Date | Notes   |
|--|-------------------------|---|
| <b>Provide High Quality Service the Best Possible Value</b>  |                         |   |
| Provide a range of availability of services offered to residents                                   | 18 Months Ongoing       | Seniors/ young adults in surrounding areas; Services offered in the area-Shared   |
| Identify and evaluate opportunities for shared services  | 18 Months Ongoing       | Police, Senior Services, Building/Vehicle Maintenance; Administrative Services and Purchasing; Community gathering places; Public/private collaboration opportunities-School District                           |
| Identify and evaluate opportunities to reduce capital costs  | 18 Months Ongoing       | Explore shared equipment agreements when appropriate to reduce the needs for low-use equipment purchases  |
| Identify and evaluate opportunities for outsourcing or insourcing services                         | 18 Months Ongoing       | IT services; building maintenance; fleet services   |
| Use LEAN processes to improve service efficiency and develop employee incentives                   | 18 Months               | Organizational structure/processes; Streamlining/ simplification; Create and Foster a Culture of Continuous Improvement   |
| Implement technologies which would improve service efficiency                                      | 18 Months Ongoing       | Parking; Pay online; Interactive kiosks; Request services online. Desktop customer service kiosks.  |
| Use budgeting for outcomes model to evaluate focus of services provided                            | 2-3 Years               | Allocation of funding for various services; Incorporate cost of service information in budget documents   |
| Use benchmarks to improve performance  | 18 Months Ongoing       | (Davis Aamons-Municipal Benchmarks Book)  |
| Communicate savings and services to public to improve awareness                                    | 18 Months Ongoing       | When applicable, compare costs through Village services with possible costs from contractors to show savings/ areas for improvement   |
| <b>Keep All Buildings Up-To-Date and in Good Operating Condition</b>                               |                         |   |
| Implement current Building Improvement Plan  | 18 Months Ongoing       | Document past/ future maintenance efforts; Prioritize maintenance needs for facilities; Perform annual condition assessments (Consult Denver Case Study on Capital Assets) (Consult ICMA Capital Asset Booklet) |
| <b>Provide Resources Necessary to Maintain or Improve Asset Value to the Community</b>             |                         |   |
| Assess long-term infrastructure needs to maximize planning capabilities                            | 2-3 Years               | Building Plan   |
| Develop a fiscally and environmentally sustainable infrastructure maintenance and replacement plan | 2-3 Years               |   |



| Recommendations   | Projected Completion Date | Notes  |
|---|---------------------------|--|
| <b>Education and Outreach</b>   |                           |  |
| Neighborhood Watch/ Seniors Connect Program                               | 2-3 Years                 | Work with Shorewood PD's Crime Prevention Officer and the Senior Resource Center Connect Shorewood resource person; They will coordinate Neighborhood Watch on any block to look out for seniors; Give the Watch what-to-do in case they don't see the senior or mail piles-up-Numbers to call |
| CPR Training for residents  | 2-3 Years                 | Have firefighters staff special events to give citizens hands-on CPR training; Set aside area and funding for training   |
| "Safe and Healthy Saturday" event at the Shorewood Public Safety Building | 18 Months<br>Ongoing      | Completed 2015-1 <sup>st</sup> "Safe and Healthy Saturday" was held on April 25, 2015 and was successful- future dates are needed  |
| <b>School Safety</b>  |                           |  |
| Review traffic flow around all schools and make suggestions               | 18 Months                 | Ask stakeholders to a meeting to discuss; What are the current issues; Possible solutions; Feasibility of solutions; Speed signs outside schools to collect data; Review and determine enforcement and/or enhancements   |
| <b>Professional Development</b>   |                           |  |
| Crisis Intervention Training (CIT) for Officers                           | 2-3 Years<br>Ongoing      | 2 Officers are currently trained; More as classes and finances are available   |
| Case Review Training to analyze trends/patterns                           | 18 Months                 |  |
| Restorative Justice Program   | 2-3 Years                 | School Resource Officer has 8 hours training in early 2015 with schools; SRO to write –up proposal on restorative justice program.   |
| Active Shooter Training and Full-scale Drill                              | 18 Months                 | All patrol officers trained 16 hours; Working with the North Shore on one incident for the whole area in 2015; Drill will not be completed in 2015; Review and tour of all schools in the fall   |
| <b>Village-Sponsored Events</b>   |                           |  |
| Walk the Village  | 18 Months                 | Have maps of the Village with mileage available; Mark-off each block as it is walked; Drop completed forms at Village Hall; Attempt to find a sponsor for event  |
| Step Challenge  | 18 Months                 | 1 <sup>st</sup> Step Challenge completed by Rec Department in 2015...no future dates available at this time.   |

| Recommendations   | Projected Completion Date | Notes  |
|---|---------------------------|--|
| <b>Other Community Events</b>   |                           |  |
| Find out what other community organizations are doing and see if there is a way to include safe and healthy items | 2-3 Years                 | Senior Resource Health Fair; BID Small Plate Event-Add Healthy options |

❖ **Healthy and Safe Community Committee Members:**

- |                     |   |                 |
|---------------------|---|-----------------|
| ○ David Banaszynski | Police Chief                                | <i>Chair</i>    |
| ○ Kevin Carini      | Deputy Police Chief                         | <i>Co-Chair</i> |
| ○ Kathleen Platt    | North Shore Health Department               |                 |
| ○ Kim Schneider     | North Shore Health Department               |                 |
| ○ Tim Kenney        | High School Principal                       |                 |
| ○ Jan Zehren        | School District Safety Coordinator          |                 |
| ○ Deb Stolz         | Recreation Department Director              |                 |
| ○ John Maydak       | North Shore Fire Department Battalion Chief |                 |
| ○ Daniel Tyk        | North Shore Fire Department Lieutenant      |                 |
| ○ Robert Stelter    | Milwaukee County District Attorney's Office |                 |
| ○ Mallory O'Brien   | Milwaukee Homicide Review Board             |                 |
| ○ Brad Murray       | Senior Resource Center                      |                 |
| ○ Ann McKaig        | Village Trustee                             |                 |
| ○ Patrick Linnane   | Village Trustee                             |                 |
| ○ Chris Swartz      | Village Manager                             |                 |

## 5.6 Open Spaces

The reason for this temporary committee is that the Village of Shorewood staff is embarking on a strategic management plan, aimed at implementing the Village *Vision 2025 Plan*. The Open Space Committee had 11 members comprised of residents, fitness, and landscape and design experts (in and out of the Village). The purpose of the committee was to develop and prioritize tactics necessary to implement the Village Vision goals related to open spaces. The open space goal is to “increase recreational activity for all ages and users.” The committee met three times and in those meetings reviewed every park, school grounds and public open space in the village, commenting on current and potential utilization. Members started off with a list of recommendations from the Comprehensive Outdoor Recreation Plan, the Atwater Park Master Plan and other related plans to understand the village’s current efforts and priorities. Many great ideas were identified, some supporting and enhancing current recommendations and other ideas not previously identified.

| Open Spaces Committee   |                           |       |
|---|---------------------------|-------|
| <b><i>“In 2025 Shorewood will be a healthy community with clean air and water; Access to excellent medical care; and businesses, facilities and programs to promote personal health and wellness”</i></b> |                           |       |
| Recommendations   | Projected Completion Date | Notes |
| <b>Inform Residents of Park and open Spaces Amenities to Increase Usage Including Estabrook Park</b>  |                           |       |
| Create a “Park Tour” brochure including recreation, history and year-round activities   | 2-3 Years                 |       |
| PR through social media, Welcome Program, etc.  | 18 Months                 |       |

| Recommendations  | Projected Completion Date | Notes   |
|--|---------------------------|---|
| <b>Inform Residents of Park and open Spaces Amenities to Increase Usage Including Estabrook Park</b> |                           |   |
| Add a civic area in the library  | 2-3 Years                 |   |
| <b>Provide Park Amenities for All Ages and Users</b>   |                           |   |
| Complete audit of all parks matching amenities to ages/users/time of day                             | 3-4 Years                 |   |
| Identify trends in parks usage   | 3-4 Years                 |   |
| <b>Provide Pocket Parks in the Commercial District</b>   |                           |   |
| Identify key pocket park locations   | 2-3 Years                 |   |
| Identify potential grants for land acquisition   | 2-3 Years                 |   |
| <b>Add Directional and Entry Signs Along the Oak Leaf Trail and Adjacent Parks</b>                   |                           |   |
| Revisit previous concepts provided to the Parks Commission   | 18 Months                 |   |
| Identify primary and secondary locations   | 2-3 Years                 |   |
| Potential High School graphic art class involvement  | 2-3 Years                 |   |
| <b>Create Village Walking Routes and Locations with Permanent Exercise Stations</b>                  |                           |   |
| Identify long walking routes that take people to more than one park                                  | 18 Months                 | Work with Health Department; incorporate with Walk the Village              |
| Work with Health Department and others to establish routes   | 18 Months                 | Incorporate with Walk the Village   |
| Create a brochure with locations; Add audio tour option  | 18 Months                 | Work with Health Department; incorporate with Walk the Village              |
| Add all-in-one exercise stations in parks  | 3-4 Years                 | Atwater Park and River Park are prime locations                             |
| <b>Atwater Park</b>  |                           |   |
| Supply Atwater Beach with recreation equipment   | 3-4 Years                 | Add 2 permanent volleyball courts on the beach; Add a concrete tennis table |
| Add ADA accessible path for strollers, walkers and wheelchairs                                       | 3-4 Years                 | In Park Plan  |
| Add bathrooms to Atwater Beach   | 18 Months                 | At minimum re-establish portable facilities                                 |
| Run cable cars to Atwater Beach so everyone has better access  | 5-6 Years                 |   |
| Add substantial seasonal shade along boardwalk and off of boardwalk                                  | 2-3 Years                 |   |
| Explore private vendor renting shading and chairs to increase utilization                            | 18 Months                 |   |
| Solicit transient merchants at beach during the high season  | 18 Months                 |   |
| Complete southern portion of boardwalk   | 2-3 Years                 | In Park Plan  |
| Replace upper Playground   | 18 Months                 | Completed-2015  |
| Provide electrical hook-up for bands/entertainment   | 18 Months                 | Identify current provisions   |
| <b>Triangle Park</b>   |                           |   |
| Increase utilization of park by removing or relocating the flag pole                                 | 2-3 Years                 |   |

| Recommendations  | Projected Completion Date | Notes   |
|--|---------------------------|---|
| <b>Triangle Park</b>   |                           |   |
| Contact neighbors to get input on current and future usage                       | 2-3 Years                 |   |
| Construct natural playscape for neighborhood children and increase utilization   | 2-3 Years                 | Create Concept  |
| <b>Nature Preserve</b>   |                           |   |
| Add benches along the center of the main path                                    | 2-3 Years                 | Make a priority in the donation program; Identify locations   |
| Add educational/ identification signage of flora and fauna                       | 2-3 Years                 | Work with School District that has current expeditionary curriculum and biodiversity study  |
| Improve access to beach area at base of the center path                          | 18 Months                 | Evaluate current conditions; Contact Boy Scouts for potential Eagle project   |
| <b>Hubbard Park</b>  |                           |   |
| Add canoe launch   | 18 Months                 | In Park Plan  |
| Add access from Oak Leaf Trail at southern end                                   | 3-4 Years                 | In Park Plan  |
| Update electrical hook-ups for bands/ entertainment                              | 2-3 Years                 | Discuss with organizers of the Summer Concert Series; Identify current provisions   |
| Allow beer purchased at the beer garden throughout the park                      | 2-3 Years                 | Review current regulations  |
| Improve safety for increased day utilization                                     | 3-4 Years                 | Improve access to park-(see River Park)   |
| <b>Estabrook Park/ Oak Leaf Trail</b>  |                           |   |
| Improve connections to Estabrook Park and the Oak Leaf Trail                     | 2-3 Years                 | In Park Plan; Widen social paths on the west side of Wilson Dr.; Add woodchips or stone at Olive, Olson, Alpine and Marlborough; Paint crosswalk across Wilson at each bus stop intersection; Olson, Wildwood, Sheffield, Kensington and Glendale; Add solar power LED lights at crosswalks |
| Add trail and park directional signs at key locations                            | 18 Months                 |   |
| Improve perception of safety by removing some of the dense brush along the trail | 18 Months                 |   |
| Extend Trail Northward   | 18 Months                 | Completed in 2015-Milwaukee County  |
| <b>River Park</b>  |                           |   |
| Add skateboard Park  | 3-4 Years                 |   |
| Add traditional or natural playground to accommodate families attending games    | 18 Months                 | In Park Plan  |
| Add signage at the Oak Leaf Trail entrance                                       | 18 Months                 |   |
| Connect River Park to Hubbard Park   | 3-4 Years                 | Connect at the northeast corner of the field to road entering Hubbard Park; Connect from southwest trail, down to Hubbard; In Park Plan   |

| Recommendations   | Projected Completion Date | Notes                          |
|---|---------------------------|--------------------------------|
| <b>River Park</b>   |                           |                                |
| Explore option of adding a retention pond to the southwest corner | 4-5 Years                 |                                |
| <b>Create a Community Space at Library Lawn</b>                   |                           |                                |
| Open up space and add tables and chairs                           | 2-3 Years                 | Understand current space usage |
| Add other amenities to attract users                              | 3-4 Years                 | Chess/Checkers                 |
| <b>Lake Bluff</b>   |                           |                                |
| Replace Tennis Courts   | 18 Months                 | In Park Plan                   |
| <b>Implement River Riparian Plan</b>                              |                           |                                |
| Improve river development with connection to Milwaukee Greenway   | 3-4 Years                 |                                |

❖ **Open Spaces Committee Members:**

- |                        |                                   |                 |
|------------------------|-----------------------------------|-----------------|
| ○ Ericka Lang          | Planning and Development Director | <i>Chair</i>    |
| ○ Paul Wasemiller      | Assistant Director of DPW         | <i>Co-Chair</i> |
| ○ Joe LeSage           | Resident                          |                 |
| ○ Fernando Moreno      | Resident                          |                 |
| ○ Kevin Byrne          | Resident                          |                 |
| ○ Paul Geisen          | Resident                          |                 |
| ○ Sangeeta Patel       | Resident                          |                 |
| ○ Barbara Kiely-Miller | Resident                          |                 |
| ○ Pat Garrity          | Resident                          |                 |
| ○ Jackie Thachenkary   | Resident                          |                 |
| ○ Lynn Trzesniewski    | Resident                          |                 |
| ○ Shawn Glazer         | Milwaukee Fitness                 |                 |
| ○ Guy Johnson          | Village President                 |                 |

## 5.7 Sustainability

The Sustainability Committee was very dedicated to integrating new ideas from the strategic planning process and meetings into existing recommendations from the Village's Sustainability Plan which was created by the Conservation Committee. Two major focus areas of this effort were solid waste and energy. Although the committee also focused on many other areas (as shown in the final recommendation table), solid waste and energy were concentrated on producing the following information in addition to recommendations. These documents help to qualify the recommendations made and further commit to improvement.

**Solid Waste:** Solid waste in America is a well-documented issue. According to an EPA study from 2012, an average American creates 4.38 pounds of waste per person per day. Of the 4.38 pounds, 1.51 pounds is diverted from a landfill by recycling and/or composting. Some estimates put the daily total at 7.1 pounds per day with only 25% being recycled or composted.

The environmental and monetary costs of solid waste can be staggering.

- Uncontained waste can end up littering our landscape and entering our water system.

- Methane gas, a byproduct of landfills, is released into our atmosphere. Methane is 20 times more damaging than CO2.
- Landfills can leach toxins which end up contaminating our groundwater and soil.
- Many American communities spend more money on waste management than on fire protection, parks and recreation, libraries or schoolbooks.

As the cost, both environmentally and monetarily, of waste removal and landfills continues to rise, it is important that the Village of Shorewood be on the cutting edge of options for waste reduction and collection.

The Shorewood Sustainability Committee has identified a goal that by 2025, the Village of Shorewood will eliminate all items from landfills that could be recycled, composted, or not generated altogether. The continued discussion of a new waste management system will have a large impact on this goal, and therefore this goal should be a large part of that discussion. Re-imagine a waste removal contract in which a company or department will willingly participate in strategies to help the Village of Shorewood achieve its goals in a cost effective and sustainable way. There may be opportunities for cooperation between municipalities as well.

The following is a list of ideas and strategies that may be utilized to assist the Village in accomplishing this goal. The Sustainability Action Plan as adopted by the Village in 2012 is cited in some of the recommendations.

### **Explore Trash Reduction Incentives**

1. Show the community the cost of waste removal. The cost of waste removal should not be buried in a bundled fee or within property taxes. Each person should know exactly how much they pay for waste removal and given ways to reduce their overall payment amount by reducing the amount of waste.
2. Investigate pay-as-you-throw waste reduction schemes whereby residents pay by weight for consumption of waste services.
3. Evaluate reward-based unit pricing by offering different size trash carts at different "prices" (e.g. charging lower periodic rates for voluntary use of 64- or 32-gallon bins, or tiered tax rebate for same).
4. Consider inverted collection schedule in which trash is picked up biweekly, with recycling and/or organics getting picked up weekly.
5. Consider a single sort option for professional waste separation.
6. Launch an educational campaign aimed at garnering community support for trash reduction.

### **Improve Recycling Opportunities**

1. Furnish all village residents with larger (64-gallon or larger) wheeled recycling bins for automated collection.
2. Maximize resource recovery by expanding allowable items to include batteries, light bulbs, small electronics, or other problematic materials.

### **Maximize Resource Recovery**

1. Offer kitchen organics ("compost") collection in conjunction with curbside yard waste service using uniform rolling carts, as with recycling.
2. Initiate opt-in curbside compost collection pilot as a fee-based subscription service.
3. Explore point collection or drop-off compost solutions using commercial organics hauler or village-operated in-vessel system.
4. Continually monitor waste by regular waste audits. Explore strategies to educate the public on findings.

5. For situations in which backyard or community composting is not appropriate or available - consult MMSD about possible kitchen disposal of organic waste. Organic waste is converted into Milorganite (fertilizer) through MMSD. Consider community outreach to promote this option.

**Energy:** 95.68% of the energy mix that powers the Village of Shorewood is comprised of coal, nuclear, or natural gas. The Shorewood Sustainability Committee has identified a goal that by 2025, the Village of Shorewood will use 25% renewable energy. This has been previously adopted by the Village Board.

The following is a list of ideas and strategies that may be utilized to assist the Village in accomplishing this goal. The Sustainability Action Plan as adopted by the Village in 2012 is cited in some of the recommendations.

### **Explore Energy Reduction in Village Buildings**

1. Establish baseline of building energy efficiency by conducting a detailed energy audit of all Village facilities
2. Implement the recommendations of the energy audit
3. Explore 'performance contracting' with a qualified company
4. Develop and issue policies to all staff on energy savings. Consider using a behavioral approach to energy savings with an entity such as 'Cool Choices'.
5. All new construction or large remodels on village buildings should be completed with energy efficiency as a high priority. Consideration should also be taken to incorporate renewable energy into these projects or at the very least built to accommodate installation in the future.
6. Incorporate Focus on Energy processes and/or incentives when upgrading the building shell, mechanical systems, or lighting.
7. Reach 25% renewable energy use by 2025

### **Explore Energy Reduction in Our Homes**

1. Educate homeowners of the incentives that are available from Focus On Energy.
2. Consider using a behavioral approach to energy savings with an entity such as 'Cool Choices'. This type of approach may work on a Village wide scale.
3. Adopt or advocate for the adoption of the newest energy codes in residential building and remodeling. ASHRAE 90.1-2013/IECC 2015
4. Develop an energy efficiency retrofit component to the Neighborhood Loan Program.
5. Incentivize energy efficiency retrofits through a direct grant to homeowners.
6. Consider teaming up with a solar installer for a group/community buy down on solar power installations. Reference [solarsheboygan.com](http://solarsheboygan.com) and [city.milwaukee.gov/MilwaukeeShines](http://city.milwaukee.gov/MilwaukeeShines)

### **Explore energy reduction in our businesses**

1. Educate the business community about the energy saving incentives through Focus on Energy.

**Sustainability Committee**

**“In 2025 Shorewood will be an ecologically responsible community with an appreciation for the lake, river and other areas and a commitment to sustainability”**

| Recommendations  | Projected Completion Date | Notes  |
|--|---------------------------|--|
| <b>Decrease Solid Waste by 25%, Increase Recycling by 25% - Includes Assessing Contract for Refuse Collection</b>  |                           |  |
| Investigate pay-as-you-throw waste reduction scheme as part of a rewards-based pricing program with separate billing to make costs/savings more visible          | 2-3 Years                 | Pat by weight for consumption of waste services; Offer different sized trash carts at different prices (e.g. tiered tax rebate for voluntary use of 64 or 32 gallon bin) |
| Consider inverted collection schedule where trash is picked-up by-weekly, with recycling and/or organics picked-up weekly  | 2-3 Years                 |  |
| Consider a single-sort option for professional waste separation  | 2-3 Years                 |  |
| Furnish all Village residents with larger (64 gallon) wheeled recycling bins for automated collection  | 2-3 Years                 |  |
| Maximize resource recovery by expanding allowable items to include batteries, light bulbs, small electronics, or other problematic materials                     | 2-3 Years                 |  |
| Offer kitchen organics (compost) collection in conjunction with curbside yard waste service using uniform rolling karts as with recycling                        | 18 Months                 |  |
| Initiate opt-in curbside compost collection pilot as a fee-based subscription service  | 18 Months                 |  |
| Explore point collection or drop-off composting solutions using commercial organics hauler or Village operated in-vessel system                                  | 2-3 Years                 |  |
| Continually monitor waste by regular waste audits. Explore strategies to educate the public on findings  | 18 Months<br>Ongoing      |  |
| Reduce the energy intensity of waste collection by encouraging or requiring use of energy-efficient or renewable energy equipped vehicles in waste hauling fleet | 18 Months                 |  |
| Consider local power production via waste recovery at collection point by operating biodigester, in-vessel composting or other capture technology                | 2-3 Years                 |  |
| Communicate Village efforts through marketing initiatives  | 18 Months<br>Ongoing      | Utilize social media, Manager’s Memo. Shorewood Today, etc.  |
| Research and determine qualifications to receive DNR recycling award   | 3-4 Years                 | After completion of waste-reduction process  |

| Recommendations  | Projected Completion Date | Notes   |
|--|---------------------------|---|
| <b>Decrease Solid Waste by 25%, Increase Recycling by 25%</b>  |                           |   |
| Explore participating in the EPA WasteWise Program or similar programs   | 3-4 Years                 | Allows for industrial standard benchmarking; Education opportunities on waste reduction initiatives; Achieve recognition for waste reduction efforts                                |
| Evaluate the Saturdays the DPW is open for residential dumping, have a Goodwill trailer present  | 18 Months                 | Residents could donate and recycle items instead of putting them in the landfill  |
| <b>Reduce Energy Usage by 25%, Increase Renewable Energy Usage by 25%</b>  |                           |   |
| Conduct a detailed energy audit of all Village facilities  | 2-3 Years                 | Establish a baseline regarding building energy efficiency   |
| Implement recommendations of the energy audit  | 3-4 Years                 |   |
| Explore “performance contracting” with a qualified company   | 2-3 Years                 |   |
| Issue staff policies regarding energy conservation   | 18 Months                 | Consider using a behavioral approach to energy savings with an entity such as “Cool Choices”  |
| Adopt legislation requiring all new construction or all large remodels on Village buildings be completed with energy efficiency as a high priority | 18 Months                 | Consideration should also be made to incorporate renewable energy into these projects, or at the very least, built to accommodate installation in the future. (see School District) |
| Incorporate Focus on Energy process and/or incentives available when upgrading the building shell, mechanical systems, or lighting                 | 18 Months                 | Incorporate with energy audit and possible performance contract   |
| Educate homeowners and business owners on incentives available to them from Focus on Energy and other resources                                    | 18 Months                 |   |
| Adopt the most recent energy codes in residential building and remodeling  | 18 Months<br>Ongoing      | ASHRAE 90.1-2013/IECC 2015  |
| Develop an energy efficiency retrofit component to the Neighborhood Loan Program   | 2-3 Years                 |   |
| Incentivize energy efficiency retrofits through a direct grant to homeowners   | 2-3 Years                 |   |
| Promote solar power by encouraging group/community buy downs on solar installations  | 18 Months                 | Reference Milwaukee Shines Program  |
| Perform feasibility study regarding solar power for all Village buildings  | 2-3 Years                 | Viroqua-based company E3 was recommended by expert; They provide free estimates/study. Explore solar on the top of parking structures   |
| Organize a tour of solar powered homes and buildings in Shorewood  | 3-4 Years                 |   |

| Recommendations  | Projected Completion Date | Notes   |
|--|---------------------------|---|
| <b>Reduce Energy Usage by 25%, Increase Renewable Energy Usage by 25%</b>  |                           |   |
| Communicate energy saving tactics through Village media outlets on a regular basis   | 18 Months<br>Ongoing      | VMM, Shorewood Today, social media                  |
| Utilize entirely electric vehicles within the Village fleet where possible   | 3-4 Years                 | Parking enforcement, some DPW, building inspections |
| Implement replacement schedule for DPW equipment and vehicles where they are replaced with energy efficient equivalents        | 18 Months                 | Village equipment and vehicle replacement plan      |
| <b>Water, Sewer and Storm Water</b>  |                           |   |
| Encourage downspout disconnections where feasible  | 18 Months<br>Ongoing      | Evaluate mandatory disconnect                       |
| Encourage rain gardens and private and public property   | 18 Months<br>Ongoing      |   |
| Promote incentives for installing green/blue roofs throughout the Village  | 18 Months<br>Ongoing      | For new development                                 |
| Encourage water efficient plumbing fixtures throughout businesses and dwellings in Village                                     | 1-2 Years                 | Loan Program, Legislation, Energy Saver             |
| Encourage residents to utilize rain barrels  | 1-2 Years<br>Ongoing      | Work with City of Milwaukee                         |
| Encourage use of porous pavement   | 1-2 Years<br>Ongoing      | Parking strip                                       |
| Install inlet filters in appropriate areas   | 18 Months<br>Ongoing      | Majority completed-2015                             |
| Continue Green Alleys  | 1-2 Years<br>Ongoing      | As repaved  |
| <b>Green Spaces and Ecosystems</b>   |                           |   |
| Continue investing in the street tree, Arbor Day and other forestry programs to maintain healthy and mature trees              | 18 Months<br>Ongoing      |   |
| Continue to incorporate native plantings in Village public spaces  | 18 Months<br>Ongoing      |   |
| Continue to maintain raingardens and biofilters in Village public areas  | 18 Months<br>Ongoing      |   |
| Install collection tanks to capture rainwater from roofs around Village buildings for watering plant material in public spaces | 18 Months<br>Ongoing      | Partially Completed-DPW-2015                        |
| Educate staff about incorporating sustainable landscaping practices while designing and maintaining public green spaces        | 18 Months<br>Ongoing      |   |
| Hire contractors for Village that follow sustainable landscaping practices   | 18 Months<br>Ongoing      | Current Contractor qualifies-2015                   |

| Recommendations  | Projected Completion Date | Notes          |
|--|---------------------------|----------------|
| <b>Green Spaces and Ecosystems</b>   |                           |                |
| Continue to maintain pesticide-free turf areas in Village public spaces to encourage beneficial insects and wildlife and promote healthy green spaces  | 18 Months<br>Ongoing      |                |
| Encourage community gardens in public spaces   | 18 Months<br>Ongoing      |                |
| Support Farmers Market in Village to encourage locally grown food  | 18 Months<br>Ongoing      | Completed-2015 |
| Educate residents about the value of maintaining street trees, planting trees, reducing pesticide use, using native plants, composting, rain barrels, rain gardens and sustainable landscaping practices | 18 Months<br>Ongoing      |                |
| Encourage volunteers to manually remove invasive species from natural areas and parks  | 18 Months<br>Ongoing      |                |
| Encourage residents to use wood chip mulch in their landscapes to decrease water use and develop program to provide free chips to residents, thereby reducing the cost to the Village to dispose of them | 18 Months<br>Ongoing      |                |
| Develop a community compost site for use by residents, reducing the amount of solid waste  | 2-3 Years                 |                |
| Develop incentives for businesses to incorporate sustainable landscaping practices on their property   | 18 Months                 |                |

❖ **Sustainability Committee Members:**

- |                     |   |                 |
|---------------------|---|-----------------|
| ○ Ian Haas          | Management Analyst                          | <i>Chair</i>    |
| ○ Paul Wasemiller   | Assistant Director of DPW                   | <i>Co-Chair</i> |
| ○ Judy Kaiser       | Staff Horticulturalist                      |                 |
| ○ Kim Forbeck       | Urban Ecology Center                        |                 |
| ○ Chase Kelm        | Conservation Committee                      |                 |
| ○ Linda Frank       | Resident                                    |                 |
| ○ Tony Seidita      | School District Facilities Director         |                 |
| ○ Michael Maher     | Village Trustee                             |                 |
| ○ Rick Meyers       | City of Milwaukee Resource Recovery Manager |                 |
| ○ Michael Vickerman | RENEW Wisconsin Program and Policy Director |                 |

## 5.8 Transportation and Infrastructure

The Transportation and Infrastructure Committee encountered the challenge of strategically planning for the further transportation needs while assessing the current and future status of the Village's infrastructure. The *Vision 2025 Plan* for transportation and infrastructure utilized components to address aging facilities and roads, safe transportation for both vehicles, bicycles and pedestrians, lighting availability, infrastructure for handling water and controlling traffic patterns through the Village.. The Transportation and Infrastructure Committee had 8 members comprised of residents, elected officials, experienced engineers who live in Shorewood and individuals that utilize the roads and sidewalks frequently. The purpose of the committee was to develop and prioritize tactics necessary to implement the Village Vision goals related to transportation and infrastructure. The transportation and infrastructure goal is to possess quality infrastructure while being financially responsible of the Village's assets. The committee met several times to assess infrastructure and safety needs. Several beneficial ideas were identified; some supporting and enhancing current recommendations and other ideas not previously identified striving towards the 2025 vision.

| Transportation and Infrastructure Committee   |                           |   |
|---|---------------------------|---|
| <i>"A financially responsible community with suitable and well-maintained public buildings and infrastructure, strong property values, a competitive tax rate, and a commitment to public service excellence"</i> |                           |   |
| Recommendations   | Projected Completion Date | Notes   |
| <b>Infrastructure</b>   |                           |   |
| Continue implementation of recommended improvements to sanitary and storm sewer systems.  | Ongoing                   | Comprehensive Facility Plan; complete environmental assessment for SE combined sewer area; include project in funding plan                    |
| Implement recommendations from Water Loss and Distribution studies.   | 18 Months                 |   |
| Continue implementation and regular updates of Village's Pavement Management Plan.  | Ongoing                   |   |
| Alley demonstration project in conjunction with alley reconstruction; emphasize concept of multi-purpose space and extension of yards.  | 18 Months                 | Establish a committee utilizing members from previous Infrastructure committees and interested individuals                                    |
| Develop funding plan for large scale alley reconstruction program.  | 18 Months                 |   |
| Adopt and implement recommendations of LED streetlight conversion plan.   | 3-4 years                 |   |
| Evaluate feasibility of utility privatization.  | 5-6 years                 | Water, sewer and street lighting  |
| Develop checklist for new and infill CBD developments identifying parking and infrastructure considerations.  | 3-4 years                 | For Village Board and CDA consideration in planning and design of proposed developments; developer negotiations.                              |
| Develop an Infrastructure Education Plan.   | 18 Months                 | Program aims to make residents/property owners aware of major infrastructure system planning, replacement schedules and costs of maintenance. |
| Showcase park connections and green infrastructure on a narrowed Wilson Drive redesign.   | 3-4 years                 | Village Board process for public review.  |

| Recommendations   | Projected Completion Date | Notes   |
|---|---------------------------|---|
| Comprehensive review of signage and traffic control to include wayfinding, pedestrian and bicycle signage.  | 18 Months                 | Review and recommend improvements / enhancements for bike and pedestrian connectivity and safety. Consider development of “map it” app for Shorewood focusing on wayfinding elements. |
| Encourage use of native landscaping for new developments and existing private properties; continue public use by Village  | 2-3 years                 | Shorewood Waters Project emphasis, Village plantings, Farmers Market, resident awareness of positive stormwater impacts.  |
| <b>Buildings &amp; Facilities</b>   |                           |   |
| Continue Village Board alternative site review for Police / Public Safety Building.   | Ongoing                   |   |
| Finalize Public Works Yard Master Planning Report.  | 18 Months                 | Presentation to Village Board for inclusion in long range financial plan.   |
| Enhance County, sport clubs and Friends partnership to improve Estabrook Park.  | Ongoing                   | Facilities and recreational offerings.  |
| <b>Shorewood Transportation Infrastructure Planning</b>   |                           |   |
| Implement Bike and Pedestrian plan recommendations.   | 0-5 years                 | Have committee implement recommendations.   |
| Develop a checklist to evaluate bike and pedestrian best management practices in any major construction program.  | 18 Months                 | Incorporate Complete Streets concept. Create Task Force to develop checklist.   |
| For all intersections not contemplated for reconstruction in short or medium term, develop a checklist of possible signage, marking or other non-construction safety improvements including Lake Drive. | 18 Months                 | Have committee further evaluate markings at intersections.  |
| Accelerate Lake Drive improvement timetable with enhanced intersections, crossing and bicycle accommodations.   | 18 Months                 | Have committee lead and further evaluate improvements   |
| Identify potential bike boulevard locations.  | 18 Months                 | For possible incorporation into Pavement Management Plan reconstruction schedule.   |
| <b>Multi-Jurisdictional Bike Planning</b>   |                           |   |
| Meet with Bike Federation to coordinate Shorewood improvements with regional plan.  | 18 Months                 |   |
| Position Shorewood as “Center of Bike Community” via mid-point on Oak Leaf Trail.   | 18 Months                 | Signage directing users to Central Business District; rest stop improvements at bridge.   |

❖ **Transportation and Infrastructure Committee Members:**

- Leeann Butschlick      Director of Public Works
- Chris Swartz            Village Manager
- Rob Vanden Noven      Resident/Engineer
- Bob Peschel              Resident/Engineer

*Chair*

*Co-Chair*

- Patrick Linnane            Village Trustee
- Tim Birkel                 Resident
- Philip Hung               Resident
- Sara Schnoor              Resident

## 6.0 Conclusion

The Vision 2025 Plan will provide guidance to the Village Board, commissions, boards, committees, staff and residents in determining the future direction for the community. The plan includes various suggestions that community groups can utilize to take action on in the upcoming ten years. It will be up to the elected and appointed officials, staff and residents to help prioritize these initiatives so that positive momentum results from the plan implementation. Village boards, committees and commissions will need to frequently visit the Vision 2025 Plan to determine if their actions match the priorities and vision included in the planning document.

At periodic, strategic points in Shorewood's future, the Village will continue to update the Vision Plan as priorities and community demands shift. The Vision Plan offers an opportunity for residents to engage in the democratic process and express their aspirations and perspectives related to the community. The Village of Shorewood is extremely fortunate to have residents and community leaders that demonstrate the passion and excitement for an engaged, transparent process. The community's residents drive these processes in order to improve our community and remain a progressive place to work, live and play for future generations.

## Appendices

- I. Village of Shorewood Vision 2025 Plan – 18 Month Implementation Checklist (2015-2017)
- II. Vision 2025 Plan Community Meeting Notes
- III. Vision 2025 Plan Focus Group Meeting Notes
- IV. Management Team Strategic Plan Presentation Summary (Humber, Mundie & McClary LLP)
- V. Shorewood Vision 2025 Executive Summary
- VI. Shorewood Vision 2025 Plan (Entire Plan)
- VII. Village of Shorewood Vision 2025 Plan Presentation

## **Appendix I**

### **Village of Shorewood Vision 2025 Plan – 18 Month Implementation Checklist (2015-2017)**



**VILLAGE OF SHOREWOOD VISION PLAN IMPLEMENTATION CHECKLIST**  
**NEXT 18 MONTHS**  
**2015-2016**



**Vision #1: To be a vibrant community with (1) safe, friendly neighborhoods offering desirable housing options that attract diverse people of all ages and stages of life; (2) opportunities to work in and to grow successful profit and non-profit businesses in and near Shorewood; (3) attractive and thriving local service, retail and hospitality businesses; (4) excellent local schools and easy access to world-class centers of culture and higher education; and (5) strong multi-modal transportation infrastructure that meets transportation needs.**

**A1. Label vacant commercial spaces on building façade directing people to more information**

| Check | # | Project and Tasks                              | Primary        | Assisting | Due | Notes |
|-------|---|--|----------------|-----------|-----|-------|
| ✓     | 1 | Develop a sign plan                            | Marketing Team |           |     |       |
|       | 2 | Propose vacant sites                           | BID Director   |           |     |       |
|       | 3 | Request and recommend proposals to Pete Petrie | BID Director   |           |     |       |
|       | 4 | Print up signs and install                     |                |           |     |       |
|       | 5 | Review results                                 |                |           |     |       |

**A2. Review 10-minute parking restrictions in 2200 block of E. Capitol Drive**

| Check | # | Project and Tasks | Primary           | Assisting    | Due  | Notes     |
|-------|---|-------------------|-------------------|--------------|------|-----------|
| ✓     | 1 | Completed in 2015 | Planning Director | Police Chief | 2015 | Completed |

**A3. Study safety improvements at Oakland Ave. and Kensington Blvd. intersection**

| Check | # | Project and Tasks   | Primary      | Assisting           | Due         | Notes |
|-------|---|---|--------------|---------------------|-------------|-------|
|       | 1 | Observe traffic   | Police Chief | Deputy Police Chief | Spring 2016 |       |
|       | 2 | Develop alternatives  | Police Chief | Deputy Police Chief | Spring 2016 |       |
|       | 3 | Review alternatives with the public                             | Police Chief | Deputy Police Chief | Spring 2016 |       |
|       | 4 | Include feasible recommendations in relation to the 2017 budget | Police Chief | Deputy Police Chief | Spring 2016 |       |

| <b>A4. Evaluate feasibility, marketing and zoning of live-work models</b>      |           |  |                                    |                   |             |              |
|--|-----------|--|------------------------------------|-------------------|-------------|--------------|
| <b>Check</b>   | <b>#</b>  | <b>Project and Tasks</b>                               | <b>Primary</b>                     | <b>Assisting</b>  | <b>Due</b>  | <b>Notes</b> |
|  | <b>1</b>  | Review best practices                                  | Planning Director                  | Village Manager   | Fall 2016   |              |
|  | <b>2</b>  | Interview with developers                              | Village Manager                    | Planning Director | Fall 2016   |              |
|  | <b>3</b>  | Draft white paper with recommendations                 | Village Manager, Planning Director |                   | Winter 2017 |              |
|  | <b>4</b>  | Submit to CDA  | Village Manager                    |                   | Winter 2017 |              |
|  | <b>5</b>  | Implement  | Village Manager, Planning Director | Marketing Team    | Winter 2017 |              |
| <b>A5. Encourage transit use by evaluating bus stop locations and shelters</b> |           |  |                                    |                   |             |              |
| <b>Check</b>   | <b>#</b>  | <b>Project and Tasks</b>                               | <b>Primary</b>                     | <b>Assisting</b>  | <b>Due</b>  | <b>Notes</b> |
|  | <b>1</b>  | Inventory all bus locations, shelters, size, condition | Planning Director                  |                   | Dec-15      |              |
|  | <b>2</b>  | Meet with MCTS   | Planning Director                  |                   | Feb-16      |              |
|  | <b>3</b>  | - confirm ridership                                    |                                    |                   |             |              |
|  | <b>4</b>  | - review MC shelter maintenance & improvement plan     |                                    |                   |             |              |
|  | <b>5</b>  | Review shelter best practices                          | Planning Director                  |                   | Jan-16      |              |
|  | <b>6</b>  | Meet with PBSC   | Planning Director                  | PBSC              | Feb-16      |              |
|  | <b>7</b>  | - review MCTS info and site                            |                                    |                   |             |              |
|  | <b>8</b>  | - evaluate site compatibility/cost                     |                                    |                   |             |              |
|  | <b>9</b>  | - make recommendation to VB                            |                                    |                   | Apr-16      |              |
|  | <b>10</b> | Collaborate improvements w/ MCTS                       |                                    |                   |             |              |

| <b>A6. Investigate providing express bus from Shorewood to downtown Milwaukee</b>        |          |  |                           |                             |            |              |
|--|----------|--|---------------------------|-----------------------------|------------|--------------|
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>            | <b>Assisting</b>            | <b>Due</b> | <b>Notes</b> |
|  | <b>1</b> | Talk with Steve Lautenschlager from MCTS about express bus from Shorewood                                  | Assistant Village Manager | MCTS                        | Mar-16     |              |
|  | <b>2</b> | Have rep from MCTS talk with PBSC and Plan Commission about logistics of express bus to downtown Milwaukee | Assistant Village Manager | MCTS, PBSC, Plan Commission | Sep-16     |              |
|  | <b>3</b> | Present express bus options to Village Board   | Assistant Village Manager | MCTS, Village Board         | Oct-16     |              |
|  | <b>4</b> | Make determination; begin communicating new route to public (if approved)                                  | Assistant Village Manager | MCTS                        | Nov-16     |              |
|  | <b>5</b> | Implement new express bus  | MCTS                      |                             | Jan-17     |              |
| <b>A7. Assist with creating local crowd source funding for new or growing businesses</b> |          |  |                           |                             |            |              |
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>            | <b>Assisting</b>            | <b>Due</b> | <b>Notes</b> |
|  | <b>1</b> | Develop goals and objectives   | Village Manager           |                             |            |              |
|  | <b>2</b> | Establish committee  | Village Manager           |                             |            |              |
|  | <b>3</b> | Develop recommendations  | Village Manager           |                             |            |              |
|  | <b>4</b> | Submit to CDA  | Village Manager           |                             |            |              |
|  | <b>5</b> | Submit to the Village Board  | Village Manager           |                             |            |              |
|  | <b>6</b> | Implementation and review  | Village Manager           |                             | Fall 2016  |              |

| <b>A8. Explore demand for business incubator or lounge/shared office space</b>        |          |   |                   |                    |             |              |
|---|----------|---|-------------------|--------------------|-------------|--------------|
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>  | <b>Primary</b>    | <b>Assisting</b>   | <b>Due</b>  | <b>Notes</b> |
|   | <b>1</b> | Establish best practices  | Village Manager   | Planning Director  | Spring 2016 |              |
|   | <b>2</b> | Focus groups/surveys  | Planning Director | Village Manager    | Spring 2016 |              |
|   | <b>3</b> | Establish committee to draft plan                               | Village Manager   | Planning Director  | Spring 2016 |              |
|   | <b>4</b> | Implement   |                   |                    | Fall 2016   |              |
|   | <b>5</b> |   |                   |                    |             |              |
| <b>A9. Identify ways to improve neighborhoods through a rental inspection program</b> |          |   |                   |                    |             |              |
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>  | <b>Primary</b>    | <b>Assisting</b>   | <b>Due</b>  | <b>Notes</b> |
|   | <b>1</b> | Create Voluntary Inspection Program                             | Planning Director |                    | Aug-15      | Done         |
|   |          | - develop inspection checksheet                                 | Planning Director | Dave/Justin/Tim    | Oct-15      | Done         |
|   |          | - promote voluntary program                                     | Planning Director | PDD                |             | Done         |
|   |          | Met with Village Board Public Works                             | Planning Director |                    | 11/16/2015  | Done         |
|   | <b>3</b> | Increased proactive exterior property inspections               | Planning Director |                    | Aug-15      |              |
|   | <b>4</b> | Require building permit displayed                               | Planning Director | Crystal/Inspectors | Sep-15      | Done         |
|   | <b>5</b> | Partner with Home Insp Assoc                                    | Village Manager   | Planning Director  | 2016        |              |
|   |          | -explore priority violations                                    |                   |                    |             |              |
|   | <b>6</b> | Feasibility if multifamily be part of Occupancy Renewal Program | Village Manager   | Planning Director  | Feb-16      |              |
|   | <b>7</b> | Do outreach Importance of Property Maintenance                  | Planning Director |                    | 2016        | ongoing      |
|   | <b>8</b> | Explore creating Change of Occupancy Inspection Program         | Village Manager   | Planning Director  | 2016        |              |

| <b>A10. Explore creation of Historical Districts</b>   |          |  |                              |   |             |              |
|--|----------|--|------------------------------|---|-------------|--------------|
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>               | <b>Assisting</b>                        | <b>Due</b>  | <b>Notes</b> |
|  | <b>1</b> | Review past efforts and consult with SHWD Historical Society   | Planning Director            |   | Spring 2016 |              |
|  | <b>2</b> | Form Ad Hoc Committee  | Planning Director            | Karen De Hartog,<br>Crystal Kopydlowski | Spring 2016 |              |
|  | <b>3</b> | Analyze & report on cost/benefits  | Planning Director            | Ad Hoc Comm, Crystal<br>Kopydlowski     | May-16      |              |
|  | <b>4</b> | Meet with Milwaukee County and State Historical Society  | Planning Director            | Ad Hoc Comm, Crystal<br>Kopydlowski     | Jun-16      |              |
|  | <b>5</b> | Make recommendation to VB  | Planning Director            | Ad Hoc Comm, Crystal<br>Kopydlowski     | Sep-16      |              |
| <b>A11. Continue encouraging local businesses to distribute community calendars and other info</b> |          |  |                              |   |             |              |
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>               | <b>Assisting</b>                        | <b>Due</b>  | <b>Notes</b> |
|  | <b>1</b> | Insert article in Managers Memo asking local businesses and community groups to share date of events with Village for calendar | Assistant Village<br>Manager | Village Manager                         | Mar-16      |              |
|  | <b>2</b> | Village Manager sends out email or letter to business leaders encouraging them to send events to Village for calendar          | Village Manager              | Assistant Village<br>Manager            | Apr-16      |              |
|  | <b>3</b> | Post events on the Calendar feature on the website   | Assistant Village<br>Manager | Website Committee                       | May-16      |              |
|  | <b>4</b> | Continue to update calendar  | Assistant Village<br>Manager | Website Committee                       | 2016        |              |

**A12. Review traffic flow around all schools and make suggestions**

| Check | #        | Project and Tasks             | Primary             | Assisting               | Due       | Notes |
|-------|----------|-------------------------------|---------------------|-------------------------|-----------|-------|
|       | <b>1</b> | Meet with Schools             | Deputy Police Chief | School Resource Officer | Fall 2016 |       |
|       | <b>2</b> | Observe traffic               | Deputy Police Chief | School Resource Officer | Fall 2016 |       |
|       | <b>3</b> | Discuss Findings/Alternatives | Deputy Police Chief | School Resource Officer | Fall 2016 |       |
|       | <b>4</b> | Discuss with School District  | Deputy Police Chief | School Resource Officer | Fall 2016 |       |
|       | <b>5</b> | Implement any changes         | Deputy Police Chief |                         | Fall 2016 |       |

**A13. Develop a plan for directional and entry signs at locations along Oak Leaf Trail to direct users to parks and businesses**

| Check | #        | Project and Tasks                    | Primary               | Assisting                       | Due         | Notes                  |
|-------|----------|--------------------------------------|-----------------------|---------------------------------|-------------|------------------------|
|       | <b>1</b> | Review existing plan docs with Parks | Public Works Director | Assistant Village Manager       | Feb-16      |                        |
|       | <b>2</b> | Determine funding source             | Public Works Director | Assistant Village Manager       | Spring 2016 |                        |
|       | <b>3</b> | Finalize design/locations            | Public Works Director | Planning Director               | Spring 2016 |                        |
|       | <b>4</b> | Approvals                            | Public Works Director | Planning Director               |             | Dependent upon funding |
|       | <b>5</b> | Installation                         | Public Works Director | Assistant Public Works Director |             | Dependent upon funding |

**A14. Explore private vendor to rent out shading structures and chairs to increase utilization at Atwater Park/Beach; solicit transient merchants at Atwater Beach during the peak season**

| Check | #         | Project and Tasks   | Primary         | Assisting                                  | Due       | Notes |
|-------|-----------|---|-----------------|--|-----------|-------|
|       | <b>1</b>  | Research other Municipalities' Programs, Policies & Best Practices  | Clerk-Treasurer |  | Mar-16    |       |
|       | <b>2</b>  | Draft Policies  | Clerk-Treasurer | Assistant Village Manager                  | Jun-16    |       |
|       | <b>3</b>  | Review Village Code for any necessary changes                       | Clerk-Treasurer |  | Jun-16    |       |
|       | <b>4</b>  | Submit Policies & Code Amendments (if necessary) to Park Commission | Park Commission | Clerk-Treasurer, Assistant Village Manager | Jul-16    |       |
|       | <b>5</b>  | Submit Code Amendments to the Board (if necessary)                  | Village Board   | Clerk-Treasurer                            | Sep-16    |       |
|       | <b>6</b>  | Research potential vendors  | Clerk-Treasurer |  | Dec-16    |       |
|       | <b>7</b>  | Request bids from vendors   | Clerk-Treasurer |  | Feb-17    |       |
|       | <b>8</b>  | Review vendor bids & make recommendation                            | Park Commission | Clerk-Treasurer, Assistant Village Manager | Mar-17    |       |
|       | <b>9</b>  | Award contract  | Village Board   | Clerk-Treasurer                            | May-17    |       |
|       | <b>10</b> | Vendor in place for Summer 2017                                     |                 |  | Summer-17 |       |

| <b>A15. Alley demonstration project in conjunction with alley reconstruction; emphasize concept of multi-purpose space and extension of yards</b> |          |  |                                 |                                 |             |                              |
|---|----------|--|---------------------------------|---------------------------------|-------------|------------------------------|
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>                     | <b>Primary</b>                  | <b>Assisting</b>                | <b>Due</b>  | <b>Notes</b>                 |
|   | <b>1</b> | Explore UWM design participation             | Public Works Director           | Village Manager                 | Dec-15      | No Grad School class project |
|   | <b>2</b> | CDS design work                              | Public Works Director           | Village Manager                 | Spring 2016 | UWM paid consultant          |
|   | <b>3</b> | Engineering                                  | Public Works Director           | Village Manager                 | Fall 2016   | Dependent upon funding       |
|   | <b>4</b> | Bid project(s)                               | Public Works Director           | Assistant Public Works Director | Spring 2017 | Dependent upon funding       |
|   | <b>5</b> | Construction                                 | Assistant Public Works Director | Public Works Director           | Spring 2017 | Dependent upon funding       |
| <b>A16. Develop plan for bike lanes, bike parking, bike sharrow lanes, bike SRTS signage, route signage and other accommodations for bikes</b>    |          |  |                                 |                                 |             |                              |
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>                     | <b>Primary</b>                  | <b>Assisting</b>                | <b>Due</b>  | <b>Notes</b>                 |
| ✓   | <b>1</b> | Completed in the Ped and Bike Master Plan    | Assistant Village Manager       | PBSC                            |             |                              |
| <b>A17. Create a Bicycle Ambassador program utilizing marketing materials to inform residents about Ped/Bike safety options</b>                   |          |  |                                 |                                 |             |                              |
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>                     | <b>Primary</b>                  | <b>Assisting</b>                | <b>Due</b>  | <b>Notes</b>                 |
|   | <b>1</b> | Review PED and Bike Safety Plan              | Ped/Bike Safety Committee       | Lt. Liebenthal                  | Spring 2016 |                              |
|   | <b>2</b> | Meet with Ped/Bike Committee                 | Ped/Bike Safety Committee       | Lt. Liebenthal                  | Spring 2016 |                              |
|   | <b>3</b> | Ped Committee to develop marketing materials | Ped/Bike Safety Committee       | Lt. Liebenthal                  | Spring 2016 |                              |
|   | <b>4</b> | Implement Materials with Police Department   | Ped/Bike Safety Committee       | Lt. Liebenthal                  | Spring 2016 |                              |
|   | <b>5</b> | Train the officers                           | Ped/Bike Safety Committee       |                                 | Spring 2016 |                              |

**A18. Promote Bike Friendly Business recognition and promoting Shorewood's walkability and bikeability**

| Check | # | Project and Tasks   | Primary                   | Assisting   | Due       | Notes   |
|-------|---|---|---------------------------|---|-----------|---|
|       | 1 | Research application  | Assistant Village Manager | PBSC  | Feb-16    | Timeline may change pending when application if specific due date for application |
|       | 2 | Assign subcommittee to explore application materials and submission | Assistant Village Manager | PBSC  | Apr-16    |   |
|       | 3 | Put together application  | Assistant Village Manager | Conservation Committee, PBSC, Public Works Director | Aug-16    |   |
|       | 4 | Submit application  | Assistant Village Manager |   | Sep-16    |   |
|       | 5 | If receive recognition, promote through communication channels      | Assistant Village Manager |   | Late 2016 |   |

**A19. For all intersections not contemplated for reconstruction, develop a checklist of signage, marking or other non-construction safety improvements including Lake Drive**

| Check | # | Project and Tasks          | Primary  | Assisting                       | Due         | Notes                  |
|-------|---|----------------------------|--|---------------------------------|-------------|------------------------|
|       | 1 | Develop preliminary list   | Public Works Director, Assistant Public Works Director | Police                          | Early 2016  |                        |
|       | 2 | Engineering review         | Public Works Director                                  | Assistant Public Works Director | Spring 2016 | Funding necessary      |
|       | 3 | DOT review (if necessary)  | Public Works Director                                  | Village Engineer                | Summer-17   |                        |
|       | 4 | Ped Committee review/input | Public Works Director                                  | Assistant Village Manager       | Summer-17   |                        |
|       | 5 | Implementation             | Public Works Director                                  | Assistant Public Works Director |             | Dependent upon funding |

| <b>A20. Accelerate Lake Drive improvement timetable with enhanced intersections, crossing and bicycle accommodations</b> |          |  |                   |  |            |                        |
|--|----------|--|-------------------|--|------------|------------------------|
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>                                     | <b>Primary</b>    | <b>Assisting</b>                                 | <b>Due</b> | <b>Notes</b>           |
|  | <b>1</b> | Develop interim marking plan                                 | Village Engineer  | Public Works Director                            |            | Dependent upon funding |
|  | <b>2</b> | WisDOT review  | Village Engineer  | Public Works Director                            |            | Dependent upon funding |
| <b>A21. Identify potential bike boulevard locations</b>  |          |  |                   |  |            |                        |
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>                                     | <b>Primary</b>    | <b>Assisting</b>                                 | <b>Due</b> | <b>Notes</b>           |
|  | <b>1</b> | Evaluate 2011 Bike Study Recommendation                      | Planning Director | Assistant Village Manager                        |            |                        |
|  | <b>2</b> | Identify appropriate bike features                           | Planning Director | Assistant Village Manager                        |            |                        |
|  | <b>3</b> | PBSC discuss/recommend                                       | Planning Director | PBSC, Bike Federation, Assistant Village Manager |            |                        |
|  | <b>4</b> | Connect with Milwaukee County                                | Planning Director | Assistant Village Manager                        |            |                        |
|  | <b>5</b> | - confirm trail plan, resources                              | Planning Director |  |            |                        |
|  | <b>6</b> | Input from City of Milwaukee Bike Coordinator Kristin Bennet | Planning Director | Assistant Village Manager                        |            |                        |
|  | <b>7</b> | Develop implementation schedule                              | Planning Director | Assistant Village Manager                        |            |                        |
|  | <b>8</b> | Make recommendation to VB                                    | Planning Director | Assistant Village Manager, PBSC                  |            |                        |

| <b>A22. Meet with Bike Federation to coordinate Shorewood improvements with regional plan</b> |          |   |                           |                                |            |              |
|---|----------|---|---------------------------|--------------------------------|------------|--------------|
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>  | <b>Primary</b>            | <b>Assisting</b>               | <b>Due</b> | <b>Notes</b> |
|   | <b>1</b> | Review feedback from the Bicycle Friendly Community award                           | Assistant Village Manager | PBSC                           | Jan-16     |              |
|   | <b>2</b> | Schedule a time for a representative from Bike Federation to meet or talk with PBSC | Assistant Village Manager | PBSC                           | Feb-16     |              |
|   | <b>3</b> | Representative form Bike Federation meets with PBSC                                 | Assistant Village Manager | Bike Federation, PBSC          | Mar-16     |              |
|   | <b>4</b> | PBSC updates priorities list based on feedback from Bike Federation                 | PBSC                      | Assistant Village Manager      | May-16     |              |
| <b>A23. Position Shorewood as "Center of Bike Community" via mid-point on Oak Leaf Trail</b>  |          |   |                           |                                |            |              |
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>  | <b>Primary</b>            | <b>Assisting</b>               | <b>Due</b> | <b>Notes</b> |
|   | <b>1</b> | Discuss marketing strategies with PBSC  | Assistant Village Manager | PBSC                           | Jun-16     |              |
|   | <b>2</b> | Collaborate to build signs along Oak Leaf Trail in Shorewood                        | Assistant Village Manager | Public Works, Milwaukee County | Jul-16     |              |
|   | <b>3</b> | Work with Marketing Team to highlight talking points assembled from the PBSC        | Assistant Village Manager | Marketing Team, PBSC           | Sep-16     |              |
|   | <b>4</b> | Continue implementing priorities in the Ped and Bike Master Plan                    | PBSC                      | Assistant Village Manager      | Ongoing    |              |
| <b>A24. Identify ways to improve neighborhoods through an alley beautification program</b>    |          |   |                           |                                |            |              |
|   | <b>1</b> | Identify best practices for alley enhancements                                      | Planning Director         |                                |            |              |
|   | <b>2</b> | Propose program   | Planning Director         |                                |            |              |
|   |          |   |                           |                                |            |              |

**Vision #2: To be a welcoming community embracing new people, innovative ideas and engaging with others to continuously improve Shorewood and the Milwaukee metro area.**

**B1. Create exploratory committee to establish Farmers Market**

| Check | # | Project and Tasks | Primary         | Assisting                             | Due  | Notes |
|-------|---|-------------------|-----------------|---------------------------------------|------|-------|
| ✓     | 1 | Completed in 2015 | Village Manager | Shorewood Foundation, School District | 2015 |       |

**B2. Encourage block parties and neighborhood associations; update application to ask to include others "outside" their neighborhood**

| Check | # | Project and Tasks   | Primary                   | Assisting                   | Due | Notes   |
|-------|---|---|---------------------------|-----------------------------|-----|---|
|       | 1 | Research how to start a neighborhood association and evaluate the feasibility for the Village.                              | Customer Service Director | Sue Kelley                  |     | Look into block captain concept                     |
|       | 2 | Consult with or solicit input from current block party coordinators on ways to implement "neighborhood association" concept | Customer Service Director |                             |     |   |
|       | 3 | Make adjustments to current application and update webpage  | Customer Service Director | Ann and Teri                |     |   |
|       | 4 | Include article with NOY article in Shorewood Today, Manager's Memo, website and School newsletter                          | Customer Service Director | Sue Kelley, School District |     |   |
|       | 5 | Explore possibility of accepting on-line signatures/applications  | Customer Service Director | Website Committee           |     |   |
|       | 6 | Consider feasibility and funding to purchase additional lighted barricades  | Customer Service Director | Public Works                |     | so that the # of parties per weekend is not limited |
|       | 7 | Investigate promotional give-aways  | Customer Service Director | Ann and Teri                |     |   |

| <b>B3. Increase participation in the Neighborhood of the Year Program</b> |          |  |                           |                           |              |  |
|---|----------|--|---------------------------|---------------------------|--------------|--|
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>            | <b>Assisting</b>          | <b>Due</b>   | <b>Notes</b>   |
|   | <b>1</b> | Send e-mail reminder w/current application early in January annually to prior year block party coordinators.                   | Customer Service Director | Ann and Teri              | Jan-16       |  |
|   | <b>2</b> | Meet w/Shorewood Connects coordinator to discuss ways to update/simplify the process   | Customer Service Director | Sue Kelley                | Jan/Feb 2016 |  |
|   | <b>3</b> | Make adjustments to current application and update webpage   | Customer Service Director | Sue Kelley                | Feb/Mar 2016 | for the new block party season   |
|   | <b>4</b> | Include articles in Shorewood Today and Manager's Memo   | Customer Service Director | Sue Kelley                | Feb/Mar 2016 | Work with Sue Kelley to develop short article for ST and continuous articles for VMM |
|   | <b>5</b> | Include application with original block party approval   | Customer Service Director | Ann and Teri              | Mar/Apr 2016 | With first block party request for the year, if possible                             |
| <b>B4. Combined, searchable events on website calendar</b>                |          |  |                           |                           |              |  |
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>            | <b>Assisting</b>          | <b>Due</b>   | <b>Notes</b>   |
|   | <b>1</b> | Insert article in Managers Memo asking local businesses and community groups to share date of events with Village for calendar | Assistant Village Manager | Village Manager           | Mar-16       |  |
|   | <b>2</b> | Village Manager sends out email or letter to business leaders encouraging them to send events to Village for calendar          | Village Manager           | Assistant Village Manager | Apr-16       |  |
|   | <b>3</b> | Post events on the Calendar feature on the website   | Assistant Village Manager | Website Committee         | May-16       |  |
|   | <b>4</b> | Continue to update calendar  | Assistant Village Manager | Website Committee         | 2016         |  |

**B5. Personal welcome to new owners and renters; deliver welcome packets by mail or in-person; make available to rental property managers and owners**

| Check | #        | Project and Tasks  | Primary                       | Assisting  | Due    | Notes |
|-------|----------|--|-------------------------------|--|--------|-------|
|       | <b>1</b> | Coordinate meetings with Marketing Team and BID Director to identify items to be included in welcome packets | Assistant Village Manager     | Marketing Team, BID Director, Village Manager, Customer Service Director | Feb-16 |       |
|       | <b>2</b> | Marketing Team assembles packet  | Marketing Team                | Assistant Village Manager, Customer Service Director                     | Apr-16 |       |
|       | <b>3</b> | BID Director and Village Manager approve packets   | BID Director, Village Manager | Marketing Team, Assistant Village Manager, Customer Service Director     | Jun-16 |       |
|       | <b>4</b> | Packets distributed to businesses new to Shorewood within 6 months and rental property managers              | Marketing Team                | Assistant Village Manager, Customer Service Director                     | Jul-16 |       |
|       | <b>5</b> | Continually distribute throughou the year  | Marketing Team                | Assistant Village Manager, Customer Service Director                     | 2016   |       |

**B6. Explore providing electrical hook-up for bands and entertainment at Atwater lower and Hubbard Parks**

| Check | #        | Project and Tasks              | Primary                         | Assisting | Due | Notes |
|-------|----------|--------------------------------|---------------------------------|-----------|-----|-------|
|       | <b>1</b> | Determine electrical needs     | Assistant Public Works Director | Dave Best |     |       |
|       | <b>2</b> | Develop work plan and estimate | Assistant Public Works Director | Dave Best |     |       |
|       | <b>3</b> | Budget for 2017                | Public Works Director           | Dave Best |     |       |

**Vision #3: To be a healthy community with clean air and water; access to excellent medical services; and businesses, facilities, spaces, and programs that promote personal health and wellness.**

**C1. Request all stakeholders to provide information about their health and safety programs and use information to print a brochure**

| Check | #        | Project and Tasks             | Primary      | Assisting           | Due         | Notes |
|-------|----------|-------------------------------|--------------|---------------------|-------------|-------|
|       | <b>1</b> | Meet with all stakeholders    | Police Chief | Deputy Police Chief |             |       |
|       | <b>2</b> | Develop criteria for brochure | Police Chief | NSFD                |             |       |
|       | <b>3</b> | Draft the brochure            | Police Chief | NS Health           |             |       |
|       | <b>4</b> | Review brochure               | Police Chief | PBSC                |             |       |
|       | <b>5</b> | Distribute Brochure           | Police Chief |                     | Spring 2016 |       |

**C2. Place an article in every Shorewood Today magazine issue that highlights one entity and what healthy and safety items/programs they provide**

| Check | #        | Project and Tasks   | Primary                         | Assisting                       | Due    | Notes |
|-------|----------|---|---------------------------------|---------------------------------|--------|-------|
|       | <b>1</b> | Attend Shorewood Today planning meetings to assess space available in magazine and timeline   | Assistant Village Manager       | Marketing Team                  | Jan-16 |       |
|       | <b>2</b> | Reach out to Police Chief and Health Department to learn about their current publications   | Assistant Village Manager       | Police Chief, Health Department | Feb-16 |       |
|       | <b>3</b> | Develop a system quarterly where Assistant Village Manager inquires about the Police and Health Departments to submit article for Shorewood Today | Assistant Village Manager       | Police Chief, Health Department | Mar-16 |       |
|       | <b>4</b> | Have Police and Health Departments submit first articles for the summer magazine  | Assistant Village Manager       | Police Chief, Health Department | May-16 |       |
|       | <b>5</b> | First Shorewood Today magazine published with health and safety articles included   | Marketing Team, Shorewood Today | Assistant Village Manager       | Jul-16 |       |

| <b>C3. Active Shooter Training and Full-Scale Drill</b>  |          |  |                                    |                                  |             |              |
|--|----------|--|------------------------------------|----------------------------------|-------------|--------------|
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>                               | <b>Primary</b>                     | <b>Assisting</b>                 | <b>Due</b>  | <b>Notes</b> |
|  | <b>1</b> | ALICE Training for Officers                            | North Shore Police Department/Fire | Police Chief                     | Summer 2016 |              |
|  | <b>2</b> | Develep Full Scale Drill                               | North Shore Police Department/Fire | Sergeant Simandl                 | Summer 2016 |              |
|  | <b>3</b> | Conduct Full Scale Drill                               | North Shore Police Department/Fire | Deputy Police Chief              | Summer 2016 |              |
|  | <b>4</b> | Debrief Drill  | North Shore Police Department/Fire |                                  |             |              |
|  | <b>5</b> | Implement Recommendations                              | North Shore Police Department/Fire |                                  |             |              |
| <b>C4. Walk the Village – includes long walking routes taking people to multiple parks, creating brochures (and audio tours to guide routes and in conjunction with permanent outdoor exercise stations at public spaces throughout village)</b> |          |  |                                    |                                  |             |              |
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>                               | <b>Primary</b>                     | <b>Assisting</b>                 | <b>Due</b>  | <b>Notes</b> |
| ✓  | <b>1</b> | Ad Hoc Health & Safety Committee Request               | Renee Gratz                        |                                  |             |              |
| ✓  | <b>2</b> | Develop walking map                                    | Planning Director                  |                                  |             |              |
|  | <b>3</b> | Complete walking map brochure                          |                                    |                                  |             |              |
|  |          | a. draft design and touchup by village marketing       |                                    |                                  |             |              |
|  | <b>4</b> | Evaluate audio option                                  |                                    |                                  |             |              |
|  |          | a. meet w/ library, confirm technology and partnership | Planning Director                  | Emily Passey, Health/Safety Comm |             |              |
|  |          | b. form ad hoc committee                               |                                    |                                  |             |              |
|  |          | c. draft audio feasibility report                      | Planning Director                  |                                  |             |              |
|  | <b>5</b> | Make recommendation                                    |                                    |                                  |             |              |

| <b>C5. Evaluate options of adding bathrooms at Atwater Park/Beach</b>             |          |  |                       |                           |            |                         |
|---|----------|--|-----------------------|---------------------------|------------|-------------------------|
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>        | <b>Assisting</b>          | <b>Due</b> | <b>Notes</b>            |
|   | <b>1</b> | Develop list of operational impacts/needs for portables on lower level         | Public Works Director | Rick Zimmer               | Feb-16     |                         |
|   | <b>2</b> | Review JJR master plan recommendations re. bathroom                            | Public Works Director |                           | Feb-16     |                         |
|   | <b>3</b> | Engineering study for permanent restroom                                       | Village Engineer      | Public Works Director     |            | Dependent upon funding  |
| <b>C6. Replace upper playground at Atwater Park</b>                               |          |  |                       |                           |            |                         |
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>        | <b>Assisting</b>          | <b>Due</b> | <b>Notes</b>            |
| ✓   | <b>1</b> | Completed in 2015  |                       |                           |            |                         |
| <b>C7. Develop plan to add playground at River Park near the baseball diamond</b> |          |  |                       |                           |            |                         |
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>        | <b>Assisting</b>          | <b>Due</b> | <b>Notes</b>            |
|   | <b>1</b> | Parks confirm priority funding from 2016 allocation or separate budget request | Public Works Director | Assistant Village Manager | Jan-16     | Will determine schedule |
|   | <b>2</b> |  |                       |                           |            |                         |
|   | <b>3</b> |  |                       |                           |            |                         |
|   | <b>4</b> |  |                       |                           |            |                         |
|   | <b>5</b> |  |                       |                           |            |                         |

| <b>C8. Replace tennis courts at Lake Bluff Elementary School</b> |          |   |  |  |            |              |
|--|----------|---|--|--|------------|--------------|
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>  | <b>Primary</b>                             | <b>Assisting</b>   | <b>Due</b> | <b>Notes</b> |
| ✓  | <b>1</b> | School District secure funding for the project  | School District                            | Asst Village Manager, Parks Commission, Shorewood Found. | 2015       | Completed    |
| ✓  | <b>2</b> | School District reach out to residents to communicate on preliminary project timeline | School District                            | Assistant Village Manager                                | 2015       | Completed    |
|  | <b>3</b> | School District works with Village in sending residents finalized project timeline    | School District, Assistant Village Manager | Parks Commission   | Mar-16     |              |
|  | <b>4</b> | Begin construction on tennis courts and parking lot extensions                        | School District                            | Assistant Village Manager                                | Jun-16     |              |
|  | <b>5</b> | Construction finished on tennis courts and parking lot extensions                     | School District                            | Assistant Village Manager                                | Aug-16     |              |

**Vision #4: To be an ecologically-responsible community with an appreciation for the lake, river, and other natural areas and a commitment to sustainability.**

**D1. Improve access to beach area at base of the center path at Nature Preserve**

| Check | # | Project and Tasks   | Primary                   | Assisting                 | Due    | Notes  |
|-------|---|---|---------------------------|---------------------------|--------|--|
| ✓     | 1 | Parks Commission identifies project as a priority in the Park Plan                                    | Parks Commission          | Assistant Village Manager | 2015   | Completed  |
| ✓     | 2 | Determine based on the agreed upon usage of the land that steps can be placed at the base of the path | Assistant Village Manager | Parks Commission          | 2015   | Completed  |
|       | 3 | Reach out to a Boy/Eagle Scouts to find a troop to take on as a project                               | Assistant Village Manager | Parks Commission          | Dec-15 | May use UW-Milwaukee or SHS students as alternatives |
|       | 4 | Provide tour of the general area to the troops and scope of project                                   | Assistant Village Manager | Parks Commission          | Mar-16 |  |
|       | 5 | Coordinate with troop(s) to begin work on project   | Assistant Village Manager | Boy/Eagle Scouts          | Apr-16 |  |
|       | 6 | Have the troop(s) finish the project and ready for implementation                                     | Assistant Village Manager | Boy/Eagle Scouts          | Jun-16 |  |

**D2. Add a canoe launch at Hubbard Park (part of Riparian RFP)**

| Check | # | Project and Tasks  | Primary                         | Assisting                       | Due       | Notes     |
|-------|---|--|---------------------------------|---------------------------------|-----------|-----------|
| ✓     | 1 | Parks Commission identifies project as a priority in the Park Plan | Parks Commission                | Assistant Village Manager       | 2015      | Completed |
|       | 2 | Parks identifies preferred location                                | Parks Commission                | Public Works Director           | spring 16 |           |
|       | 3 | Determine necessary engineering                                    | Public Works Director           | Assistant Public Works Director | spring 16 |           |
|       | 4 | Parks/Village Board approvals                                      | Public Works Director           | Assistant Village Manager       | TBD       |           |
|       | 5 | Construction docs/bid  | Public Works Director           | Village Engineer                | TBD       |           |
|       | 6 | Construction   | Assistant Public Works Director | Public Works Director           | TBD       |           |

**D3. Assess contract and evaluate cost effective practices for refuse and recycling collection (2016 RFP); initiate opt-in curbside compost collection pilot as a fee-based subscription service; provide recommendations to the Village Board**

| Check | #        | Project and Tasks   | Primary  | Assisting                       | Due    | Notes           |
|-------|----------|---|--|---------------------------------|--------|-----------------|
|       | <b>1</b> | Complete projected operational impact study of fully automated service implementation                       | Assistant Public Works Director                        | Public Works Director           | Jan-16 |                 |
|       | <b>2</b> | Special Village Board meeting to determine service level priorities   | Village Manager, Public Works Director                 | Assistant Public Works Director | Jan-16 |                 |
|       | <b>3</b> | Finalize RFP incorporating multiple service variations including items identified by Conservation Committee | Public Works Director                                  | Assistant Public Works Director |        |                 |
|       | <b>4</b> | Issue RFP   | Public Works Director                                  | Assistant Public Works Director |        |                 |
|       | <b>5</b> | Formulate DPW proposal submission   | Public Works Director, Assistant Public Works Director | Finance Director                |        | Mark financials |
|       | <b>6</b> | Review/recommendation   | Village Manager, Public Works Director                 | Assistant Public Works Director |        |                 |

**D4. Create dashboard to continually monitor waste by regular waste audits; explore strategies to educate public on findings**

| Check | #        | Project and Tasks  | Primary                | Assisting                 | Due     | Notes |
|-------|----------|--|------------------------|---------------------------|---------|-------|
|       | <b>1</b> | Develop dashboard graphic                                    | Public Works Director  |                           | 16-Jan  |       |
|       | <b>2</b> | Update monthly   | Public Works Director  | PW Admin Assistant        | Ongoing |       |
|       | <b>3</b> | Inc. in VM memo and on web                                   | Public Works Director  | Assistant Village Manager | Ongoing |       |
|       | <b>4</b> | Conservation Committee for additional educational strategies | Conservation Committee |                           | TBD     |       |

| <b>D5. Develop staff policies regarding energy conservation</b>   |          |  |                           |                                    |            |              |
|---|----------|--|---------------------------|------------------------------------|------------|--------------|
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>            | <b>Assisting</b>                   | <b>Due</b> | <b>Notes</b> |
|   | <b>1</b> | Develop strategies   | Public Works Director     | Sustainability Committee           | Summer 16  |              |
|   | <b>2</b> | Consider incorporation in HR manual  | Assistant Village Manager |                                    | TBD        |              |
| <b>D6. Educate homeowners and business owners on incentives available to them from Focus on Energy and other resources; Communicate energy saving tactics through Village media outlets</b> |          |  |                           |                                    |            |              |
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>            | <b>Assisting</b>                   | <b>Due</b> | <b>Notes</b> |
|   | <b>1</b> | Research and put together a flyer educating homeowners and businesses on energy incentives and resources | Conservation Committee    | Assistant Village Manager          | Jan-16     |              |
|   | <b>2</b> | Approve flyer and materials  | Conservation Committee    | Assistant Village Manager          | Apr-16     |              |
|   | <b>3</b> | Produce copies of flyer to send to businesses; have available at Conservation Fair                       | Conservation Committee    | Assistant Village Manager          | May-16     |              |
|   | <b>4</b> | Post flyer content in manager's memo, website and social media   | Assistant Village Manager | Conservation Committee             | May-16     |              |
|   | <b>5</b> | Continue to post reminders about program   | Assistant Village Manager | Conservation Committee             | 2016       |              |
| <b>D7. Evaluate potential code changes aimed at energy efficiency in residential building and remodeling</b>  |          |  |                           |                                    |            |              |
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>            | <b>Assisting</b>                   | <b>Due</b> | <b>Notes</b> |
|   | <b>1</b> | Review best practices  | Planning Director         | Building Inspector (Justin Burris) |            |              |
|   | <b>2</b> | Meet with Focus on Energy  | Planning Director         | Building Inspector (Justin Burris) |            |              |
|   | <b>3</b> | Meet with Conservation Committee   | Planning Director         | Building Inspector (Justin Burris) |            |              |
|   | <b>4</b> | Draft ordinance to VB  | Planning Director         |                                    | Sep-16     |              |
|   |          | (do concurrently with green codes)   |                           |                                    |            |              |

| <b>D8. Explore solar power by encouraging group/community buy downs on solar installations</b>   |          |   |                                 |                           |            |              |
|--|----------|---|---------------------------------|---------------------------|------------|--------------|
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>  | <b>Primary</b>                  | <b>Assisting</b>          | <b>Due</b> | <b>Notes</b> |
| ✓  | 1        | Have representatives from solar company come in to talk about group buy down structure    | Conservation Committee          | Assistant Village Manager | Completed  |              |
|  | 2        | Coordinate schedule with City of Milwaukee to complete joint program                      | Conservation Committee          | Assistant Village Manager | Feb-16     |              |
|  | 3        | Promote program through Village communications and Conserv. Fair                          | Assistant Village Manager       | Conservation Committee    | May-16     |              |
|  | 4        | Conduct multiple neighborhood meetings so that neighborhoods can learn more about program | Conservation Committee          | Assistant Village Manager | Jun-16     |              |
|  | 5        | Have residents sign up by this date to solidify program and begin installations           | Conservation Committee          | Assistant Village Manager | Aug-16     |              |
| <b>D9. Promote incentives for installing green/blue roofs throughout the Village; evaluate Village codes to include more environmental friendly construction (i.e. blue roofs) and storm water clean initiatives</b> |          |   |                                 |                           |            |              |
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>  | <b>Primary</b>                  | <b>Assisting</b>          | <b>Due</b> | <b>Notes</b> |
|  | 1        | Review recommendations by 1000 Friends via WCMP Codes & Ord Project 2015                  | Planning Director               |                           |            |              |
|  | 2        | Draft ordinance   | Planning Director               |                           |            |              |
|  | 3        | DPW review/recommendations  | Assistant Public Works Director | Planning Director         |            |              |
|  | 4        | Create marketing materials  | Planning Director               |                           |            |              |
|  | 5        | Recommend to VB   | Planning Director               |                           | Sep-16     |              |

| <b>D10. Implement recommendations from Water Loss and Distribution Studies</b> |          |  |  |                                 |            |                      |
|--|----------|--|--|---------------------------------|------------|----------------------|
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>                       | <b>Primary</b>   | <b>Assisting</b>                | <b>Due</b> | <b>Notes</b>         |
|  | <b>1</b> | SCADA system install                           | Pulbic Works Director                                  | Assistant Public Works Director | 16-Dec     | 2016 capital project |
|  | <b>2</b> | complete reading system analysis and issue RFP | Public Works Director, Assistant Public Works Director | Finance Director                | Spring 16  |                      |
|  | <b>3</b> | finalize and print distribution study          | Public Works Director                                  |                                 | Spring 16  |                      |
|  | <b>4</b> |  |  |                                 |            |                      |
|  | <b>5</b> |  |  |                                 |            |                      |

**Vision #5: To be a financially responsible community with suitable and well-maintained public buildings and infrastructure, strong property values, a competitive tax rate, and a commitment to public service excellence.**

**E1. Successfully implement merit pay system for employees**

| Check | #        | Project and Tasks  | Primary                   | Assisting                      | Due       | Notes |
|-------|----------|--|---------------------------|--------------------------------|-----------|-------|
|       | <b>1</b> | Conduct research on other merit pay programs   | Assistant Village Manager |                                | Completed |       |
|       | <b>2</b> | Update performance evaluation form and matrices  | Assistant Village Manager | Department Heads               | Jan-16    |       |
|       | <b>3</b> | Update merit pay language in the HR manual   | Assistant Village Manager | Village Manager, Village Board | Feb-16    |       |
|       | <b>4</b> | Setup team meetings with staff to review merit pay systems                                 | Assistant Village Manager | Department Heads               | Mar-16    |       |
|       | <b>5</b> | Make final changes based on feedback from staff  | Assistant Village Manager |                                | Apr-16    |       |
|       | <b>6</b> | Present merit pay materials to the Village Board   | Assistant Village Manager | Village Manager, Village Board | Apr-16    |       |
|       | <b>7</b> | Put merit pay materials on the Intranet  | Assistant Village Manager | Website Committee              | May-16    |       |
|       | <b>8</b> | Begin implementing merit pay system; pay increases based on merit will take effect in 2017 | Assistant Village Manager | Department Heads               | Jul-16    |       |

| <b>E2. Coordinate Shorewood application for the Baldrige performance excellence award</b>  |          |   |                       |                                       |            |  |
|--|----------|---|-----------------------|---------------------------------------|------------|--|
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>                | <b>Primary</b>        | <b>Assisting</b>                      | <b>Due</b> | <b>Notes</b>   |
| ✓  | <b>1</b> | Obtain Program criteria                 | Finance Director      | N/A                                   | 2015       | completed  |
| ✓  | <b>2</b> | Train on application process            | Finance Director      | N/A                                   | 2015       | completed  |
|  | <b>3</b> | Formulate "as is" processes for Village | Finance Director      | Village Manager /<br>Department Heads | 6/30/2016  | Department Heads will be consulted<br>on current processes |
|  | <b>4</b> | Identify "gaps" in current processes    | Finance Director      | Department Heads                      | 12/31/2016 | Per Baldrige matrix  |
|  | <b>5</b> | Discuss / implement quick fixes         | Finance Director      | Department Heads                      | 12/31/2016 | Consult with Department Heads                              |
|  | <b>6</b> | submit initial Baldrige Application     | Finance Director      | Assistant Village<br>Manager          | 6/30/2017  | Request Tyler to proof and review                          |
| <b>E3. Provide guidelines for consideration to require all new construction or all large remodels on Village buildings be completed with energy efficiency</b> |          |   |                       |                                       |            |  |
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>                | <b>Primary</b>        | <b>Assisting</b>                      | <b>Due</b> | <b>Notes</b>   |
|  | <b>1</b> | Research                                | Public Works Director | Assistant Public Works<br>Director    | 16-Dec     | will require consultant assistance                         |
|  | <b>2</b> |   |                       |                                       |            |  |
|  | <b>3</b> |   |                       |                                       |            |  |
|  | <b>4</b> |   |                       |                                       |            |  |
|  | <b>5</b> |   |                       |                                       |            |  |

| <b>E4. Develop a vehicle replacement plan that focuses on replacements with energy efficient equivalents</b> |          |  |                  |                  |            |  |
|--|----------|--|------------------|------------------|------------|--|
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>   | <b>Assisting</b> | <b>Due</b> | <b>Notes</b>                                   |
|  | <b>1</b> | Current VARP notes that energy efficient vehicles are to be considered where feasible upon replacement |                  |                  |            | complete for DPW                               |
|  | <b>2</b> |  |                  |                  |            |  |
|  | <b>3</b> |  |                  |                  |            |  |
|  | <b>4</b> |  |                  |                  |            |  |
|  | <b>5</b> |  |                  |                  |            |  |
| <b>E5. Develop funding plan for large scale alley reconstruction program</b>                                 |          |  |                  |                  |            |  |
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>   | <b>Assisting</b> | <b>Due</b> | <b>Notes</b>                                   |
|  | <b>1</b> | Evaluate rough costs for reconstruction of each alley  | Finance Director | Public Works     | 12/30/2015 | May need to consult with Clark-Dietz           |
|  | <b>2</b> | Assign PASER ratings or equiv.   | Finance Director | Public Works     | 12/30/2015 | Most recent data                               |
|  | <b>3</b> | Consider Logistical issues   | Finance Director | Public Works     | 1/31/2016  | Surface types, Road Plan, access issues, other |
|  | <b>4</b> | Develop replacement sequenses  | Finance Director | Public Works     | 2/28/2016  | Prioritize clusters                            |
|  | <b>5</b> | Develop multi-level funding plan   | Finance Director | Public Works     | 3/30/2016  | \$\$\$   |

**Vision #6: To be a well-governed community with leaders and citizens who value broad civic participation and maintain a long-range, disciplined view of the future.**

**F1. Online suggestion box on the Village website (Community Voice)**

| Check | # | Project and Tasks   | Primary                   | Assisting                          | Due    | Notes |
|-------|---|---|---------------------------|------------------------------------|--------|-------|
|       | 1 | Research vendors and compare to Community Voice           | Assistant Village Manager | Website Committee                  | Jan-16 |       |
|       | 2 | Make recommendation on vendor if not Community Voice      | Assistant Village Manager | Website Committee, Village Manager | Feb-16 |       |
|       | 3 | Implement new or update old suggestion system             | Assistant Village Manager | Website Committee                  | Mar-16 |       |
|       | 4 | Promote suggestion program through Village communications | Assistant Village Manager |                                    | Mar-16 |       |
|       | 5 | Continually monitor and update suggestion system          | Website Committee         | Wilson Drive Task Force            | 2016   |       |

**F2. Hold community and neighborhood get-togethers/meetings facilitated by Village staff or Village Board members**

| Check | # | Project and Tasks       | Primary                                    | Assisting                 | Due | Notes |
|-------|---|-------------------------|--|---------------------------|-----|-------|
|       | 1 | Establish program goals | Village Manager                            | Marketing Team            |     |       |
|       | 2 | Evaluate best practices | Village Manager                            | Assistant Village Manager |     |       |
|       | 3 | Draft Program           | Assistant Village Manager, Village Manager | Marketing Team            |     |       |
|       | 4 | Board approves          | Village Manager                            |                           |     |       |
|       | 5 | Implement               | Village Manager                            |                           |     |       |

| <b>F3. Develop a formal communication process to establish minimum guidelines for disseminating information to the community</b> |          |  |                 |                           |            |   |
|--|----------|--|-----------------|---------------------------|------------|---|
| <b>Check</b>   | <b>#</b> | <b>Project and Tasks</b>                                 | <b>Primary</b>  | <b>Assisting</b>          | <b>Due</b> | <b>Notes</b>  |
|  | <b>1</b> | Review/Update existing draft plan                        | Clerk-Treasurer | Assistant Village Manager | Mar-16     | Drafted by Communications and Community Spirit Committee in Vision 2025 Implementation Plan |
|  | <b>2</b> | Identify People/Entities/Resources to be Included        | Clerk-Treasurer | Assistant Village Manager | Apr-16     | Village website, Shorewood Today, North Shore Now, School newsletter, etc.                  |
|  | <b>3</b> | Review plan with Department Heads                        | Clerk-Treasurer | Dept. Heads               | Apr-16     |   |
|  | <b>4</b> | Submit Plan to Marketing                                 | Marketing       | Clerk-Treasurer           | May-16     |   |
|  | <b>5</b> | Communicate/Implement Plan with People/Entities Involved | Clerk-Treasurer |                           | Jun-16     | Send to Website, Marketing, Dept. Heads, Library, School, etc.                              |
|  | <b>6</b> | Communicate Plan to the Public                           | Clerk-Treasurer |                           | Jun-16     |   |

| <b>F4. Develop Citizens Academy and other citizen interest groups to target specific issue-related topics</b> |          |  |                           |  |            |              |
|---|----------|--|---------------------------|--|------------|--------------|
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>   | <b>Primary</b>            | <b>Assisting</b>   | <b>Due</b> | <b>Notes</b> |
|   | <b>1</b> | Create a plan that outlines the purpose and vision for the Citizens Academy  | Assistant Village Manager | Village Manager  | Jan-16     |              |
|   | <b>2</b> | Share vision and purpose with departments and community groups to provide input and ask for commitment to assist           | Assistant Village Manager | Department Heads, Village Board, School District, Community Groups | Mar-16     |              |
|   | <b>3</b> | Ask for Village Board approval on the idea and concept of the Citizens Academy   | Assistant Village Manager | Village Manager, Village Board                                     | May-16     |              |
|   | <b>4</b> | Promote the upcoming program and begin asking for applicants   | Assistant Village Manager | Community Groups   | May-16     |              |
|   | <b>5</b> | Review and select from list of applicants; begin preparations for first Citizens Academy                                   | Assistant Village Manager | Village Manager  | Jul-16     |              |
|   | <b>6</b> | Start the Citizens Academy; send out press release to Shorewood Now and Shorewood Today advertising the first year program | Assistant Village Manager | Village Manager, Department Heads, Community Groups                | Sep-16     |              |

| <b>F5. Consolidate and categorize the planning documents in a location easily accessible to the public with summary overviews</b> |          |   |                   |  |            |              |
|---|----------|---|-------------------|--|------------|--------------|
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>  | <b>Primary</b>    | <b>Assisting</b>                           | <b>Due</b> | <b>Notes</b> |
|   | <b>1</b> | Identify active plans that should be made accessible  | Planning Director | Public Works Director,<br>Library Director | Dec-15     |              |
|   | <b>2</b> | Clean up web access to historical and active plans  | Planning Director | Assistant Village<br>Manager               | Jan-16     |              |
|   | <b>3</b> | Scope of content: Identify associated documents, ephemera, tools, and information that will be included with planning documents in library's public access document center. | Library Director  | Department Heads,<br>Village Board         | Jan-16     |              |
|   | <b>4</b> | Plan space and display unit at library for public access document center.   | Library Director  | Planning Director                          | Feb-16     |              |
|   | <b>5</b> | Write internal operating procedure for maintenance of and additions to document center.   | Library Director  | Planning Director                          | Mar-16     |              |
|   | <b>6</b> | Roll out document center, including promotions.   | Library Director  | Planning Director                          | Apr-16     |              |

| <b>F6. Develop an Infrastructure Education Plan</b> |          |   |                           |   |            |              |
|---|----------|---|---------------------------|---|------------|--------------|
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>  | <b>Primary</b>            | <b>Assisting</b>  | <b>Due</b> | <b>Notes</b> |
|   | <b>1</b> | Coordinate with Public Works to identify main infrastructure to include in plan           | Assistant Village Manager | Public Works Director, Assistant Public Works Director                      | Mar-16     |              |
|   | <b>2</b> | Public Works complete an outlining summarizing infrastructure for plan                    | Public Works Director     | Assistant Village Manager, Assistant Public Works Director                  | Jul-16     |              |
|   | <b>3</b> | Assemble plan into document and finalize  | Assistant Village Manager | Public Works Director, Assistant Public Works Director                      | Sep-16     |              |
|   | <b>4</b> | Present plan to Village Manager and Village Board   | Public Works Director     | Assistant Village Manager, Assistant Public Works Director, Village Manager | Oct-16     |              |
|   | <b>5</b> | Adopt plan and update   | Village Board             | Village Manager   | Nov-16     |              |
|   | <b>6</b> | Inform public on plan through Village communications and hard copy present at the Library | Assistant Village Manager |   | Nov-16     |              |
| <b>F7. Update webpage with Ped/Bike info</b>        |          |   |                           |   |            |              |
| <b>Check</b>  | <b>#</b> | <b>Project and Tasks</b>  | <b>Primary</b>            | <b>Assisting</b>  | <b>Due</b> | <b>Notes</b> |
|   | <b>1</b> | Coordinate with Ped/Bike Committee to identify information to post on website             | Assistant Village Manager | PBSC  | Feb-16     |              |
|   | <b>2</b> | Post updated plan and other information on website  | Assistant Village Manager | PBSC  | Apr-16     |              |
|   | <b>3</b> | Continually update page with Ped/Bike information   | Assistant Village Manager | PBSC  | 2016       |              |

## **Appendix II**

### **Vision 2025 Plan Community Meeting Notes**

#### Ellen/Roy/Mike Maher Group

- Explore grant funding with schools for green roofs on public buildings.
- Explore Shared Police Force
- Continue to promote joint services with the School District.
- Explore ways to trade services with School District
- Meetings on Saturday; Voting on Saturday.
- Our own Electronic Voter registration
- More resident forums. Ie. How to get involved.
- Promote Restaurant/ Sendiks/ Roundys that uses locally grown food.
- Eliminate use of plastic bags
- Signs that show that parks grass is pesticide free
- Ordinances on natural plant heights be raised, encourage more non-grass vegetation.
- Canoe landing on River Park
- Create activities with the Urban Ecology Center to plant/fly fishing/clinics on bird watching
- Nature preserve trail enhancements, educational signs, etc.
- More green areas in new construction
- Promote green leaf program with new construction
- New designs of property must have bio-swailes and storm water incorporate best practices for storm water in new buildings and rehabs
- Implement river trail system
- Expand Hubbard Park Trail to River Park
- Use larger print posters
- Promote high school art contest
- Traffic Calming on neighborhood streets to direct cars to major streets
- Car share/zip-cars
- Support regional transportation efforts
- Convert Village Vehicles to alternative and electric
- Encourage employees to ride bikes, public transportation or car pool through rewards
- Welcome Wagon Brochure form Conservation Committee
- Day Care needs
- More playgrounds
- Pocket parks.
- Explore use of solar power for Village Buildings
- Encourage use of solar power for residents

#### David Drew, Dick Eschner Group

- More visual reminders of pedestrian crossings
- Mid-Block crosswalk on Morris/Lake Bluff
- Route 4<sup>th</sup> of July parade back through neighborhoods to draw families
- When reconstructing streets, design intersections with the primary objective of pedestrian safety
- Narrow Wilson Drive
- Bump-outs where bike route crosses Wilson.
- Provide best practices guide for building appearance (no vinyl siding!)
- Reduce Parking Requirement
- Encourage Front yard gardens
- Awards for attractive gardens

#### PBSC

Be safest Suburb in Milwaukee Cty.

- Promote Walkability by having more eyes on the street
- Village street light audit to ensure uniform and effective lighting to encourage pedestrian safety

- Encourage adequate bus stops, shelters and service
- Encourage School district to provide safe routes to school program
- Maintain and ensure Village right-of-along sidewalks is not encroached by homeowners and businesses
- Pass Complete streets ordinance

#### Friendly Neighborhoods

- Architecture tours
- Discover Shorewood Walking Tour
- Shorewood Food Tour
- Bike Share
- BID Sponsored pedestrian pub crawl and caroling

#### Opportunities to Grow

- Car share
- Develop AB data (on bike path) into Business incubator
- Add bicycle parking in the street during summer.
- Add beer or wine garden at Hubbard park
- Create space for wedding receptions and other parties.
- Promote Shorewood to UWM, Marquette, and other higher education staff, as well as, hospitals, symphonies, i.e. open houses for UWM employes, etc)

#### Attractive and thriving

- Drive Customers to Shorewood businesses ie Shorewood Food Tour
- Improve ped and bike access and parking to businesses
- Add covered bicycle parking for new mixed use developments
- Bike share
- Do not replace sidewalk blocks that are no longer level- shave/plane like Milwaukee
- Reward Village staff for walking or biking to work
- Bike rickshaws

## **Appendix III**

### **Vision 2025 Plan Focus Group Meeting Notes**

## **Community Participation: Focus Groups**

On October 15 and 16, facilitator Barbara Grant met with 51 citizens who represented specific demographic groups whose points of view might not be captured in a community workshop discussion.

### **Young Adults/Professionals**

Fourteen young adults aged 25 to 40 participated in an evening focus group. Represented were renters and homeowners who were single, engaged, and married; with or without children; and in Shorewood for two months to many years. Though generally from Wisconsin, several moved here from out of state. Though generally economically well-off, some were not as comfortable.

#### **Housing**

Homeowners in this group reported spending a fair amount of time finding a house that met their needs, and all lamented the small number on the market; one looked for two years. Interior upgrades, especially kitchens, were a welcome choice when available. They considered property ownership an investment in what they consider an appreciating market. Finding a starter home was reported to be easier than finding a four bedroom/two bath home in which to raise a family.

Renters in this group came because of the relative affordability of this housing choice.

- Some planned to move up to home ownership thru buying a duplex and renting one unit to offset the cost or to rent both and use the income to help finance a single-family home mortgage.
- Some found the two-bedroom apartment option affordable, though some reported even this was a struggle.

Both homeowners and renters commented that young professionals might start by renting or buying a starter home in Shorewood, but at ages 35-40, they look to move up. This might mean moving out of Shorewood by choice or thru lack of housing availability.

Most participants reported their families lived within easy drive distance (~ one hour) and all had friends who lived closer (~ fifteen minutes).

#### **Life Style Preferences**

This group likes the Shorewood schools and safe, urban life style with unique houses and attractive neighborhoods. Specifically mentioned were walking on sidewalks and using the area bike trails, small lot sizes (not suburban lawn tractor sizes), children in neighborhoods, and enough things to do.

The “friendliness” factor was considered an important quality of life preference. They like having friendly but not too nosy neighbors. They are open to developing social groups in the neighborhood if the option presented itself, but they do not expect neighbors to be their primary social group.

Participants generally prefer independent restaurants over chains and would like more good quality, mid-range options (including ethnic food) that would also offer take-out in Shorewood. They reported driving to Bayview for food.

They think that the village website provides good promotions on things to do, and like the text alert options available.

One female participant expressed concern about an uptick in crime that was not being appropriately reported.

### **Recommendations**

Participants recommended that the village recruit other young professionals to rent and then own in Shorewood by marketing to “feeder schools” (Milwaukee professional schools) by offering weekly events with drinks at Shorewood bars, for example, to encourage other YP’s to move to Shorewood.

Most supported the development of a Farmer’s Market proposed by one member. Another suggested a zip car sharing option.

## **Neighborhoods**

Eight residents of Shorewood Connects Neighborhoods participated in a morning focus group held at Village Hall. They were owners, renters, and landlords. Some were new residents while others were longer term residents.

Participants reported that a robbery created a sense of vulnerability that brought them together, making their neighborhood safer and their ties stronger. Beyond feeling they could ask for a cup of sugar from a neighbor, they annually exchanged names, addresses, and phone numbers as well as recommendations regarding babysitters and contractors.

### **Housing**

Shorewood’s housing had varied and appropriate price points for each participant; homes were urban in character and located close to Milwaukee.

They believe that “rentals are here to stay,” especially for women. The rental market is very strong with renters responding to simple property signs and word-of-mouth advertising.

### **Preferences**

Participants expressed a preference for neighborhoods that were not homogeneous and for strong schools their kids can walk to.

They consider the “friendliness” factor important to quality of life. They all value the concrete sense of community that they have developed through their neighborhood groups; they sympathized with one participant who tried to develop a program but failed.

Shorewood’s walkability was valued not only for the convenience of children walking, but also for the independence and personal safety skills (street-smarts) it develops.

They like hanging out in front yards, an urban rather than a suburban back yard model.

### **Recommendations**

They recommended developing ties neighborhood by neighborhood and supporting the Welcome Neighbors program.

Participants recommended giving financial encouragement to property owners to upgrade their property and incentives to comply with garage and green space zoning code requirements, not

limiting incentives to businesses. They expressed mild concern about the reputation of village inspectors.

They proposed public bids for work on private property so that lower costs could be shared by those replacing windows, for example, similar to what is done for sidewalks.

They supported and recommended planning for seniors to “age in place.”

## **Seniors**

A meeting of fifteen seniors was held at Village Hall on the morning of October 16. This lively and engaged group of residents shared their stories of choosing to live in Shorewood. Most had lived in Shorewood for more than twenty years; one lived here all her life. Some had lived here, moved out, and moved back recently. Two had moved from a single-family home in Milwaukee to apartments in the Fountainview.

There were more duplex and apartment dwellers at the meeting; several who owned single family homes were considering staying in Shorewood but down-sizing.

Participants spoke about how their lives and choice of homes have changed over time and how they are planning for their future needs.

## **Housing**

Owners of single family homes in the group were planning to move only when they have to and getting help from family or contractors to do physically difficult work. One owner was worrying about the cost of upkeep and taxes during a time of temporary disability. Another moved into a Shorewood duplex twelve years ago and then bought a small house in which she plans to stay as long as she can. One widow had a friend move in with her.

One condo owner reported that 1/3 of the condos were now housing students; this was not her expectation when joining a homeowners association building.

Those who had already made the decision to move out of a single family home and downsize were happy with their choices. One bought a duplex with her sister. Two sold their Milwaukee single family homes to move into the Fountainview and both loved the double balcony arrangement; one noted that she appreciated the age diversity in the complex. A couple who had lived in what they called a suburban “prison” with their son and daughter-in-law were sure they would never move from River Park.

## **Preferences**

Participants were enthusiastic supporters of the Senior Center and its director and enjoyed and used the library. Several said they enjoyed and used the fitness center and valued the Osher.

## **Recommendations**

Improve the safety at the Edgewood/Oakland corner’s right turn lane by extending the light or posting it as “no right turn.”

Alleviate barriers to walking during the winter by cleaning the crosswalks of snow.

Regulate bikes on the sidewalks, especially on the narrow Oakland sidewalks.

Improve skateboarder safety by prohibiting riding them on streets, especially on streets at night without reflectors.

## **Boosters**

Nine Shorewood residents representing various community groups met at Village Hall on October 16. Groups included but were not limited to the Shorewood High School Alumni, Welcome New Neighbors, Shorewood School District, Shorewood Connects, Shorewood Foundation, Shorewood Historical Society, Shorewood Business Improvement District, King's Lutheran Church, Lutheran, Village Conservation Committee, and the Women's Club; other groups represented were too numerous for participants to detail.

### **Housing**

Housing options were not discussed, although marketing Shorewood's strengths to real estate agents was discussed.

They are aware and sensitive to the needs of young adults who can't afford even duplex housing with a patch of grass, the low quality of some rental properties, the concentration of landlords, and the lack of convenient parking for those living in apartments.

### **Preferences**

Boosters love being active in the community and seeing their efforts improve the quality of life in Shorewood.

They like having places to meet and interact; these include not only coffee shops for person-to-person interactions, but also the schools, churches, parks, and other larger-venue places to share community activities and create connections. Churches allow other non-profit groups to use their buildings and parking lots so that they can serve the greater Shorewood community.

Boosters see Hubbard Park and the Nature Preserve as community assets for individuals as well as for families and community groups wanting to gather together.

### **Recommendations**

Because boosters value volunteering, they suggest creating opportunities to volunteer with a low barrier to entry, a limited time to commit, an defined purpose, and a variety of activities; Fall Clean Up is just such a volunteer opportunity.

Participants expressed disappointment that significant initiatives begin with enthusiasm and booster buy-in, as did the Atwater plan, and then fail at the implementation stage due to lack of adequate funding and volunteer burn-out. More pre-planning to secure significant financing and showing appreciation to volunteers who help implement the plan could help.

Participants feel that Shorewood's snow removal program is not working at corners, in the business district, and near student rentals and that this should be corrected.

Boosters support continuing the Welcome New Neighbors program.

They suggest improving the Fitness Center signage to encourage greater awareness and use.

## **Business Owners**

Seven small business owners met at Village Hall on October 16. Two were artists who worked from home or in, three had consulting businesses, and two had retail shops not within the Business Improvement District.

### **Housing**

Space needs for home-based businesses varied but usually included an Internet connection and an office. This group suggested there might be as many as 200 home-based businesses in Shorewood, many of whom fear being taxed on their inventory and business equipment including computers or being prohibited from working at home if the village knew of their existence.

Their homes do not provide a place to meet with clients in a professional setting.

### **Preferences**

All loved living and working in Shorewood but were isolated. The Internet provided marketing and collaboration on-line, but meeting in person to collaborate and network was sometimes preferable.

All were interested in one business's use of Regus virtual office services to receive and hold deliveries and provide a professional space to work and/or meet with clients. This international firm provides flexible work spaces, telephone answering/forwarding services, video conferencing, meeting rooms, etc.

### **Recommendations**

Discussion centered on how a coffee shop front in Shorewood with office and meeting space behind might improve their business and quality of life.

## **Appendix IV**

**Management Team Strategic Plan Presentation  
(Humber, Mundie & McClary LLP)**



the Village of  
**Shorewood**  
AT THE EDGE OF THE CITY AND THE HEART OF EVERYTHING

# Village of Shorewood

## Management Team Strategic Planning

April 7, 2014 Summary

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On April 7, 2014 the Village of Shorewood Management Team met for the purpose of extending its Strategic Plan across the next three years. Progress from the past was considered self-evident to this group and not reviewed; those achievements are available in other documents. In light of current needs though the Team was asked to consider three questions:

Imagining that it is now 2017:

1. What has been achieved over the past three years to bring Shorewood to a perfect position of having met all of our expectations for our community?
2. What has achieving these goals done for us as a community?
3. What did we do to effect these changes?

Rather than beginning with challenges or impediments the Village might face and therefore start from the perspective of what limits their efforts, the Team moved forward with consideration of what they would like to have achieved.

Question 1 resulted in a brainstorm of 51 separate ideas for what was achieved by the year 2017 such that the Village was running optimally. The Management Team then collated the information into ten broad categories:

- A. Transportation
- B. Communications
- C. Sustainability
- D. Business Development
- E. Open Spaces
- F. Public Infrastructure
- G. Public Services
- H. Housing
- I. Safe Community
- J. Community Spirit

The Team then addressed Question 2, “What has achieving these goals done for us as a community?” Discussion of this resulted in a list of 28 items (see IMPACT, page 13-14).

These were incorporated into the 51 ideas of achievement and distributed among the ten broad categories. The results follow.

## **A. Transportation**

- 1. Established local supplement for transportation.**
- 2. Increased number of parking spaces in Village and advertised it.**
- 3. Created pedestrian-only areas and allowed for light-only transport.**
- 4. Improved bike travel and bike share.**
- 5. Solved parking issues.**
- 6. Majority of residents are biking/walking.**
- 7. Shuttle runs on 15-minute schedule.**
- 8. Developed light rail through collaboration with Milwaukee.**



## **B. Communications**

- 1. High level of informed resident engagement.**
- 2. Took advantage of technological opportunities to interact with residents.**
- 3. Whole village became a Wi-Fi hotspot.**
- 4. Developed most efficient and effective refuse system in the state.**
- 5. Communications director won national award.**



## **C. Sustainability**

- 1. Built greener community through sustainability plan.**
- 2. Became recognized as leader in environmentally responsible government.**
- 3. Majority of residents are walking/biking.**



## **D. Business Development**

- 1. South end of village became as vibrant as the North end.**
- 2. Created an environment where new businesses were successful.**
- 3. Increased diversity of businesses.**
- 4. All old 2- and 3-story apartment buildings are gone.**
- 5. Pick n' Save and associated apartment buildings are opened and spur development.**
- 6. Attracted numerous business headquarters.**
- 7. Created shared work center for small businesses.**



## **E. Open Spaces**

- 1. Created public plaza at Oakland and Capitol.**
- 2. Increased utilization of parks providing entities for all ages and users.**
- 3. Increased community gardens/farmer's market.**
- 4. Improved great river development with connection to Milwaukee green way.**
- 5. Obtained dome over football field for all election activities/sports.**
- 6. Run cable cars to Atwater Beach so everyone has better access.**
- 7. Established thriving town center.**



## **F. Public Infrastructure**

- 1. Police station is part of community; station used for events.**
- 2. Updated the look of Village (new signage).**
- 3. Fully funded water improvement system.**
- 4. Alleys are as beautiful as the streets**
- 5. DPW facilities are charming and functional.**
- 6. Funded plan for sanitary sewers and drainage for southeast district.**
- 7. Improved public infrastructure.**



## **G. Public Services**

- 1. Performance measures and benchmarks created goals for staff, which they found useful.**
- 2. Paperless inside and outside the Village.**
- 3. Staff worked toward measurable goals for financial and personable growth reasons.**
- 4. Library includes communal workspace and maker's space.**
- 5. Developed the most efficient and effective refuse system in the state.**
- 6. County board helping with future goals.**
- 7. Completed consolidations for police and senior resource center.**
- 8. All frontline staff were cross-trained across parks.**
- 9. Village assumed maintenance of buildings and grounds from school district with adequate resources and funding.**
- 10. Instituted local sales tax.**

## H. Housing

1. Total home remodeling is common.
2. Desirable and affordable housing is plentiful.



## I. Safe Community

1. Locking, lighting, taking, and reporting is practiced.
2. Crime and fear of crime decreased.



## J. Community Spirit

1. Have achieved a thriving community with community spirit.



1. **Safe and easy access to parks, stores, and restaurants.**
2. **People want to live in Shorewood.**
3. **Improved business district.**
4. **Efficient and sustainable community.**
5. **Effective organization with efficient and responsive services.**
6. **Enhanced commitment to infrastructure funding.**
7. **Kept money in the community.**
8. **Increased community volunteerism/participation (500%).**
9. **Created desirable housing stock.**
10. **Open/shared communication between residents and staff.**
11. **Improved property values.**
12. **Improved mass transit.**
13. **Became the Capital Community in the North Shore.**
14. **Known for great entertainment and shops.**

15. **Committed resources to maintaining, cleaning, and housekeeping in business district on a continual basis.**
16. **Environment results in happier, healthier residents.**
17. **Increased recreational activity.**
18. **Support for small businesses and home-based entrepreneurs.**
19. **Increased all forms of transportation and decreased parking issues.**
20. **Summer event destination in county.**
21. **Known as municipal leader in benchmarking.**
22. **Known for great customer service.**
23. **Single mission for shared resources between school and village government.**
24. **Award winning website that increased communication and services.**
25. **Known as great place to work and attracts the best and brightest.**
26. **School enrollment increases.**
27. **Receive no complaints for bad roads.**
28. **Safest community in the North Shore.**

## Summary

Having combined the actions and the values into the ten broad categories, Team members were then asked to accept Chair and Co-Chair responsibilities for each of the categories. Chairs and Co-Chairs are as follows:

- A. Transportation: Chair – Dianne, Co-Chair – Dave
- B. Communications: Chair – Beth, Co-Chair – Dianne
- C. Sustainability: Chair – Pete, Co-Chair – Leanne
- D. Business Development: Chair – Chris, Co-Chair – Erica
- E. Open Spaces: Chair – Erica, Co-Chair – Paul
- F. Public Infrastructure: Chair – Leanne, Co-Chair – Beth
- G. Public Services: Chair – Mark, Co-Chair – Pete
- H. Housing: Chair – Chris, Co-Chair – Erica
- I. Safe Community: Chair – Dave, Co-Chair – Deputy Chief
- J. Community Spirit: Chair – Sherry, Co-Chair – Dave

This led to a discussion of process (see Question 3 on page 1). It was suggested that:

- ...each Chair build an action-taking committee from other current Shorewood Administrative personnel and from outside experts and/or volunteers. (Chairs are not expected to bring about these changes by themselves.)
- ...action-taking committees meet to review the suggested desirable achievements already brainstormed, then determine what actions are needed to bring about each achievement.
- ...the committees prioritize the actions to take according to 1) Value to the community, 2) Effort needed, and 3) Budget issues.
- ...the Village Manager choose specific dates for Chair reports on progress. Reports are to be made to the Management Team at a regular meeting.
- ...the Village Manager hold each Chair accountable for progress and for regular reports.



*It is this type of forward-thinking that serves to lead The Village of Shorewood into a successful future.*

*With dedication to progress through the foregoing initiatives, this community ensures that it will be*

*“At the edge of the city and the heart of everything.”*

## **Appendix V**

### **Shorewood Vision 2025 Executive Summary**

## **Executive Summary: Shorewood Vision 2025 Project**

### *Process Overview*

“Visioning” is a term used to describe a strategic planning process that develops an image of what a community would like to be in the future and an implementation plan to get there. It uses information gathered in order to understand the answers to four important questions:

1. Where are we now?
2. Where are we going?
3. Where do we want to be?
4. How do we get there?

In 2005, the Village Board undertook its first village-wide visioning project under the direction of Barbara Grant of Public Management Partners LLP who used US Census data from 2000 and other Shorewood information to answer the essential four questions.

In 2009, the Board reviewed the Vision Statement and revisited the Implementation Plan through a condensed process with Grant that updated the Implementation Plan but retained the Vision Statement.

In 2013, Barbara Grant returned to facilitate a village-wide visioning project that used data from the 2010 US Census and the American Community Survey 2007-2011 5-Year Estimates conducted by the US Census Bureau. Grant reviewed and included information from the village’s current Comprehensive and Vision Implementation Plans, survey results from the 2013 community-wide survey and resident exit surveys, and a variety of other relevant information.

Grant collected community input from five focus groups and one open-invitation community workshop to search for trends or issues that might not yet be observable and to test the community’s understanding of retail market realities. [See attached Focus Group and Workshop Reports.]

The Village Board, Manager, and department heads met with Grant to revise the Vision Statement and Implementation Plan objectives and goals. She assisted the manager and his staff in developing Implementation Plan strategies and tactics to implement the Board’s 2025 Vision Plan, Goals, and Strategies.

### *Information Analysis Summary*

Analysis of the information collected shows that, like Wisconsin where residents most often move within Wisconsin, the Milwaukee metro area is a “sticky” area that primarily keeps residents rather than attracts new residents from out of the area. Access to jobs in Shorewood, Milwaukee, and the greater metro area as well as proximity to family keeps residents; however, the metro job market is not a major attraction for out of state job seekers. Shorewood attracts a greater percentage of residents from outside of Wisconsin and the United States than do comparable communities.

Shorewood appeals to people who want to live in a vibrant, safe urban environment adjacent to Milwaukee. They appreciate, and sometimes rely on, the ability to walk, bike, and bus to excellent local schools, UW-Milwaukee, the Shorewood library, Milwaukee’s cultural assets,

and metro area jobs and shopping. Although the total population continues to decline, Shorewood continues to attract a growing percentage of adults aged 20-24 and aged 55-64.

Residents find a home among a variety of detached, single-family homes, duplexes, and larger multi-family housing units that fits their needs. Housing and rental vacancy rates are low, so the search for a place can be difficult.

The beauty and architectural diversity of Shorewood's single-family detached homes appeal to a special set of homeowners in the metro housing market; the lack of interior updates is a liability. People looking for a single-family detached home with three or more bedrooms in which to raise a family will not find a large number from which to choose in Shorewood.

Over 50% of residents do not own a vehicle or only own one. Convenient public transportation is essential to some and a convenience to many others. Car-owners in many rental units find the lack of convenient parking an impediment.

Many residents value the ease of accessing and enjoying Shorewood's parks, trails, lakefront, and urban forest by foot and bicycle more than auto-centric suburban homes with larger yards. They are strongly supportive of the Village's environmental sustainability activities.

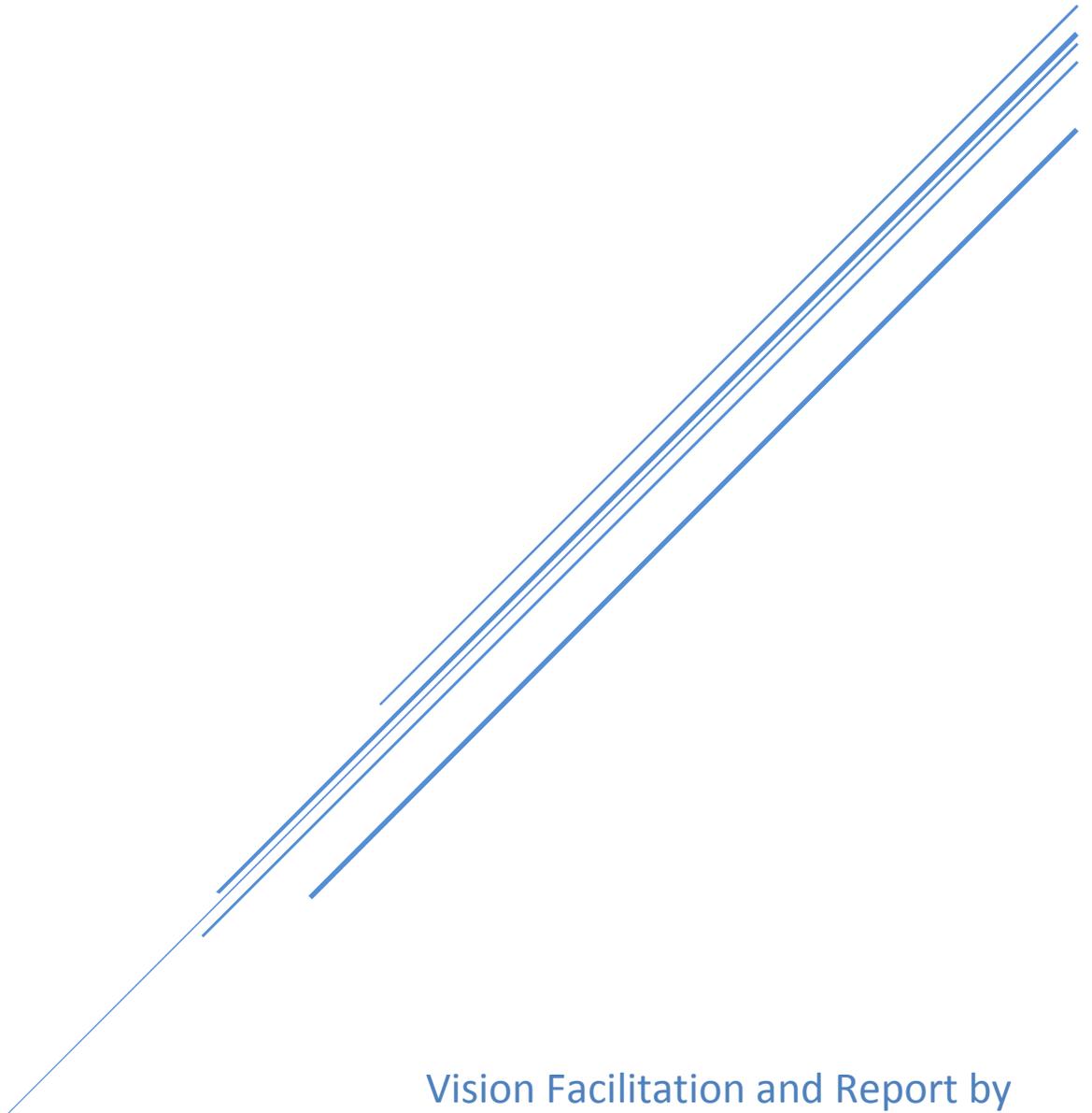
Lack of convenient parking in the downtown commercial district is an impediment to businesses that require high traffic volume. The extended linear arrangements on Oakland and Capital, the age and configuration of available retail space, and competition from nearby regional shopping centers blocks development of national chain retail shopping and impedes the development of destination retail options. Neighborhood businesses that provide goods and services to nearby residents are more common and include some popular and upscale restaurants/bars. Parking convenience is often a limitation.

## **Appendix VI**

### **Shorewood Vision 2025 Plan (Entire Plan)**

# SHOREWOOD VISION 2025

2013-14 Strategic Planning Process Final Report



Vision Facilitation and Report by  
Barbara Grant

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## **Executive Summary: Shorewood Vision 2025 Project**

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## **Shorewood Vision 2025 Report**

### *Where are we now?*

Vision development and implementation planning is most successful when it is based on a broad understanding of “What Is” before planning for what is desired and what is attainable. This section discusses information gathered from the United States 2010 Census (US Census), the American Community Survey 2007-2011 (ACS) estimates based on sampling survey data and information, various village report information, and information gathered from the vision project focus groups and community vision workshop.

### *Age, Lifestyle, and Housing Choices*

Shorewood remains a fully developed, primarily residential landlocked village 1.6 square miles in size with 75% of its housing stock built on or before 1939. Consideration of all housing and population information since the 2005 Vision Project, Shorewood’s detached single family and multi-family housing has not changed dramatically and attracts a variety of residents. Renters are well-represented in all age groups.

Selected 2010 census data from Shorewood and six comparable communities [Brown Deer, Cedarburg, Glendale, Mequon, Wauwatosa, and Whitefish Bay] and Wisconsin was used to evaluate how Shorewood compares in key markers of lifestyle and location choice.

- With a median age of 37.2, Shorewood’s median age is identical to that in the US, younger than Wisconsin (38.5), and slightly younger than Whitefish Bay (39.6). Other comparable communities are clearly older with median ages ranging from 41.8 to 46.8.
- With a median household size of 2.06, Shorewood has the lowest median household size; Cedarburg is highest with 3.0.
- A slim majority of households are non-family households (51%).
- 39% of householders live alone, higher than in comparable communities and in Wisconsin.
- Except as compared to Whitefish Bay, Shorewood is more educated than its comparable communities (35% with graduate and professional degrees and 67% with a bachelor’s degree or higher).
- 5% of Shorewood children are under 5 years of age, above Mequon’s 4% and below Whitefish Bay’s 7%.
- 16% of Shorewood residents are of school age, similar to Glendale (16%) and Brown Deer (17%). This is lower than Wisconsin (20%) and other comparable communities that are above 20%.
- 23% of Shorewood households have children under the age of 18, similar to Glendale and lower than all other comparable communities. Whitefish Bay tops the group with 41% of households having children under 18.
- 26% of Shorewood residents are aged 55 and older; 13% are aged 65 and older. This is similar to Wisconsin as a whole, slightly above Whitefish Bay (24%), but below other comparable communities.

- A slim majority of Shorewood residents are renters (51.4%); approximately 1/3 of households are renters in all comparable communities except Whitefish Bay, where only 15% are renters.
- Contract rent payments are lower (\$780) than in all comparable communities except Cedarburg (\$777).
- Contrary to the community perception in 2005, most renter-occupied units are not duplexes and only 698 of the 3,387 renter occupied housing units are occupied by residents aged 15-24; renters are well-represented in all age categories.

Because strong schools are important to maintaining property values, other suburban Milwaukee communities have strong schools. Shorewood's housing stock limits the village's ability to attract families with school-age children into the limited number of 3+ bedroom single-family homes generally desired. In addition, the number of children is projected to be flat well past mid-century, making competition to attract school age children to Shorewood even harder.

The number of active older adults moving in as both owners and renters has continued to rise since the 2005 Vision Project. The newest condominium units planned should be attractive to this segment. As the 55-64 age group is a growing demographic past 2025, Shorewood may be able to capitalize on the vitality this group would bring.

“Location, location, location,” the mantra of property selection, focuses the visioning process on why residents and businesses choose Shorewood. Location refers not only to the municipality, but also to the neighborhood's physical character, current/potential residents, and the types and quality of housing available. Businesses then rely on available customers, drawing from varying distances within their respective markets.

The primary reasons for living in Shorewood are covered in the Vision Statements, and reasons to move to Shorewood were well-articulated by project participants: the high quality schools, proximity to downtown Milwaukee, sense of place, styles of housing and neighborhoods, safety, jobs, and nearness to family are why Shorewood is a desirable community.

Project participants had difficulty articulating why others might choose a different Milwaukee metro community. The village's exit surveys, though small in number, give a slightly different view of reasons why people choose to move in and out of Shorewood. As approximately 2/3 of village residents moved in since 2000, survey answers have relevance.

- Milwaukee is a “sticky,” city and region, keeping many and attracting a few. The majority of new homeowners and new renters moved from Milwaukee (frequently the East Side and Bay View but not usually downtown or River West neighborhoods), or from the larger Milwaukee metro area. They most often looked in Milwaukee, Whitefish Bay, and Wauwatosa before choosing Shorewood.
- 20% of new renters and homeowners surveyed moved to Shorewood from out of state/country.

- Over half of survey respondents rent before buying a home in Shorewood; 42% reported they are first-time homeowners.
- ~ 60% of renters moved into apartment-style housing units.
- 55% of the new homeowners had children; 35% of renters had children. Most children were 0-6 years old.
- ~50% of those who leave Shorewood move out of the area; about 45% move to Milwaukee or elsewhere in the greater metro area.
- Overnight street parking was the top item listed that new renters would like to see in Shorewood and was the most frequent “other” reason given for those who left.
- Although “other” was the most frequent marked reason to leave Shorewood, cost of living and taxes were commonly marked; the survey list of “other” reasons is worth looking at in its entirety. The full report can be found as Supplement #1.

Although anecdotal, focus group participants shed some additional light on the Shorewood housing market.

- Young adult homeowners reported searching for a fairly long time before finding their home; one couple looked for three years for an acceptable larger place to raise their family. Young adults considered Shorewood a “starter home” market because affordable 3+ bedroom homes were in short supply and updated interiors hard to find.
- Duplex renters had to be on their toes to find a place to rent; landlords reported a sign was all the marketing they needed to find new renters. (Note: There were no large apartment complex landlord/manager participants.) The ACS vacancy rate for rentals was only 1.2%.
- Retired and elderly renters loved their places, whether they were high end or subsidized renters; all seemed to have planned their move well in advance.
- Some retired and elderly homeowners reported getting help to stay in their homes now; others expressed that they may need to move or get help in the future.
- Two younger renter participants had trouble paying for what they reported as poorly-kept 1-2 bedroom apartments; two exit surveys also noted poor property management.

Focus group participants discussed the sense of belonging and neighborhood friendliness that they felt they had found in Shorewood. This was not expecting your neighbors to be your primary friends, but feeling that neighbors look out for you and would help out if you needed more than a cup of sugar. Some neighborhoods had regular social gatherings and exchanged names and contact information; others simply enjoyed the social interaction a small front yard with a sidewalk brings. One award-winning neighborhood group said that a particular crime had pulled them together but that that togetherness went well beyond neighborhood safety; one participant said that this had failed to work in her neighborhood.

Race and cultural diversity was valued by most visioning participants representing a variety of neighborhoods and housing styles; cookie-cutter suburban lifestyles and white-only neighborhoods were frequently belittled. However, visioning participants generally did not

want to be like Milwaukee, fearing that “big city” troubles would follow. Shorewood’s current social cohesion is based on shared values and behaviors such respect for education, belief in keeping up your property, and compliance with noise/nuisance regulations. “Big city” stereotypes assume that “big city residents” do not share “small town” values and behaviors.

Age diversity was generally valued, but not specifically the dense pockets of university students in duplexes; project participants were not asked to address this directly. Younger generations in the Fountainview were specifically valued by one older participant; two different property owners expressed concerns with age/lifestyle differences in a condominium association; one participant expressed concerns about owning property in a neighborhood of primarily rental duplexes.

### *Municipal Services and Priorities*

The 2013 community on-line survey explored residents’ perceptions of service quality and priorities; support for specific Village Vision Implementation Plan initiatives; the perceived importance of taking action to address specific quality of life issues; and funding for continued, contracted, or expanded services.

2013 survey respondents were not proportionally representative of the entire community as more homeowners with children living in single-family homes were heavily represented as were those earning \$75,000 or more; almost half of respondents had resided in Shorewood for 16+ years. Respondents to the 2008 paper survey were more representative and yet the results were similar to those collected in 2013 for identical questions posed. [See Supplement #2: “Village-Wide Survey Results 2013”.]

- Characteristics of Shorewood such as schools, ease of walking, traffic on major streets, and quality of businesses were rated as good to excellent.
- Neighborhood conditions (housing maintenance and noise/nuisance issues) were rated as good.
- Parking at one’s home and at night was rated as good, but parking in the business district was considered somewhat difficult.
- Respondents were overwhelmingly supportive of sewer improvements.
- Ratings of village initiatives to implement the Vision Plan were positive, with the highest rankings going to park improvements/upgrades and environmental initiatives; pedestrian and bicycle safety improvements were rated good.
- Use of environmentally-friendly products and services was clearly favored, even if they cost more.
- Just over 2/3 prefer to either maintain or expand services, even if that required increased user fees and/or property tax increases. The most popular option (60%) was to maintain services and to keep increases in taxes and fees to the rate of inflation.

- Only 1/3 of respondents preferred to use the tax levy to deal with alley resurfacing; alley-adjacent owners were less supportive of using special assessments as a funding source than those who did not live adjacent to alleys.

### *2015 Vision Plan Accomplishments*

The 2015 Visioning Implementation Plan has six elements under which goals and strategies were developed to accomplish productive change in both village services and the community. The plan has been continually updated and progress tracked. A summary of these Vision Plan elements, goals, strategies, initiative and status is included in this report as Supplement #3.

Though not all-inclusive, of particular note are the following accomplishments:

- Deliver Quality Services at a Competitive Tax Rate: The manager and his staff have focused on improving efficiency in service delivery since 2005; this has included customer service training, process improvements, acceptance of e-payments, and better use of IT and the village website. By focusing on increasing assessed property values, the village has promoted maintenance in targeted neighborhoods, and streamlined the permitting process. Since 2009 they have completed a pilot project to address parking on Capital/S. Oakland and worked with the Community Development Association (CDA) and Business Improvement District (BID) to develop a master plan to improve business vibrancy, to explore large-scale redevelopment projects, and to solicit businesses and developments to increase the tax base.
- Promote Vibrant Urban Housing: The manager and his staff have focused initiatives on encouraging improvements to both multi-family (MF) and single family (SF) housing through not only revisions to the Comprehensive Land Use Plan, but also development of low-interest public and private loan funding for improvements to SF homes; these loans encourage duplex conversions to SF homes. Since 2009, staff have implemented a commercial licensing program for MF rental units and begun to explore an expansion of the commercial loan program to encourage redevelopment or replacement of older apartment buildings.
- Maintain a High-quality Urban Living Experience with a “Small Town” Feel: The village has implemented an effective branding campaign to promote Shorewood’s high quality of life and increase the village’s competitiveness in the north shore housing market. Staff has cultivated civic participation and service to others thru the Connecting Caring Community initiative started in 2008 and the Connects Neighbors initiative started in 2009. Focus group participants reported volunteers were successful advocates for developing connections between people, providing services to especially the elderly, and using their marketing program to promote acceptance of diversity. Staff has implemented portions of the 2007-2010 Streetscape Plan to improve pedestrian/ADA safety and has initiated a sidewalk replacement program.

- Protect and Enhance Property Values: In addition to what the manager and staff have done as noted above, they have reviewed the building and zoning codes to identify impediments to maintenance of properties and established a staff code enforcement officer to promote property maintenance in targeted neighborhoods. Changes to land use regulations limit conversions of SF homes to duplexes. The village developed a comprehensive village building plan, an annual capital improvements plan, and a 30 year street replacement program in 2005.
- Remain Committed to Open, Interactive Communication and Involvement: The Weekly Manager's Memo, Shorewood Today magazine articles, updated website, social networking, neighborhood meetings, surveys, comment cards, and other initiatives have cultivated general and specific communication. Involvement in the Visioning Project was actively sought, and opportunities to connect through civic participation and volunteering are actively promoted.
- Promote Environmental Protection Activity in the Village and Village Residents: Shorewood's marketing program promotes Shorewood's eco-friendly physical assets and environmental sustainability practices, and these are well known and supported by residents. Shorewood has begun implementation of the river trail plan and invested in park improvements.

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## Where are we going?

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Vision planning next attempts to project where a community is headed if current trends continue and known changes happen. This section discusses US Census data from 1990 thru 2010, ESRI analysis of Census and Bureau of Labor Statistics data, village-collected information and plans, and project participants' input and observations.

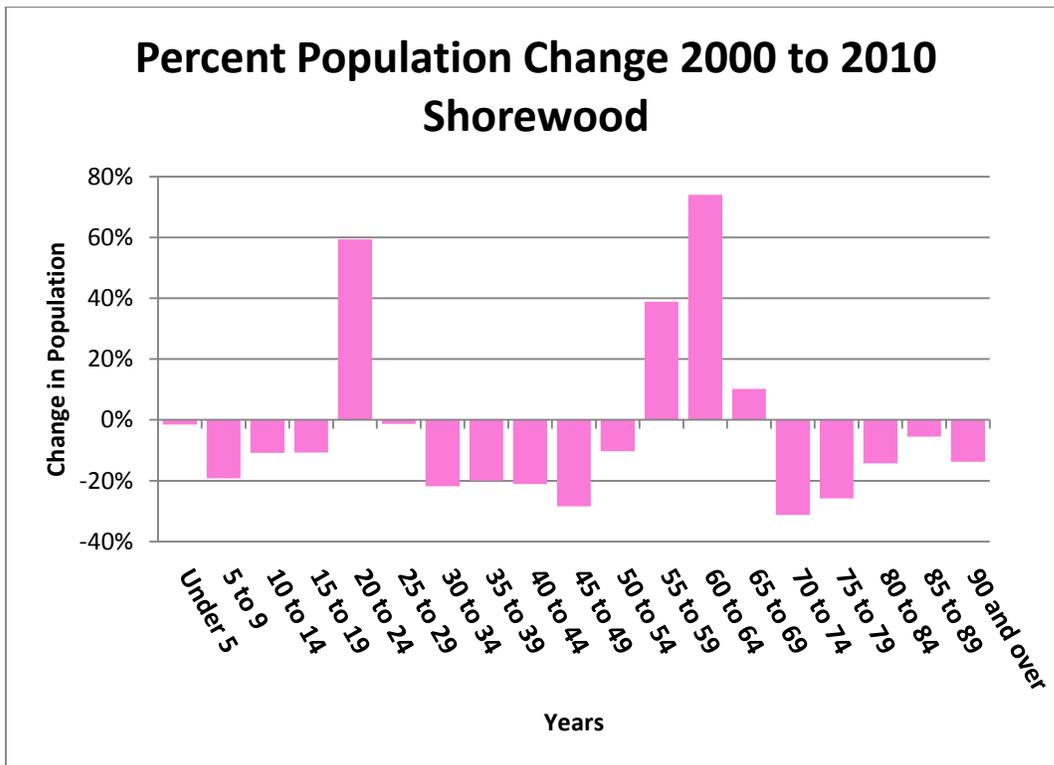
### *Census Trends*

Wisconsin's and the United States' populations have grown in the last decade; Shorewood has continued its gradual decline.

#### Total Population by Decade

|           | 1970   | 1980   | 1990   | 2000   | 2010   |
|-----------|--------|--------|--------|--------|--------|
| Shorewood | 15,576 | 14,327 | 14,116 | 13,763 | 13,162 |

However, the percentage change in specific age groups in Shorewood varies widely as shown in the next graph.



The ACS estimates that nearly 2/3 of Shorewood residents have moved in during the last decade. Although Shorewood’s population continues to decrease slowly, the village is attracting and losing specific demographic groups.

The 59.4% increase in residents aged 20-24 is significant, as is the 74% jump in residents aged 60 to 64. However, Mequon’s increase in residents aged 20-24 was 140% and Cedarburg’s over 60%. The growth in baby boomers is a national trend, but Shorewood is keeping/capturing more than all comparable communities except for Whitefish Bay (75.5%).

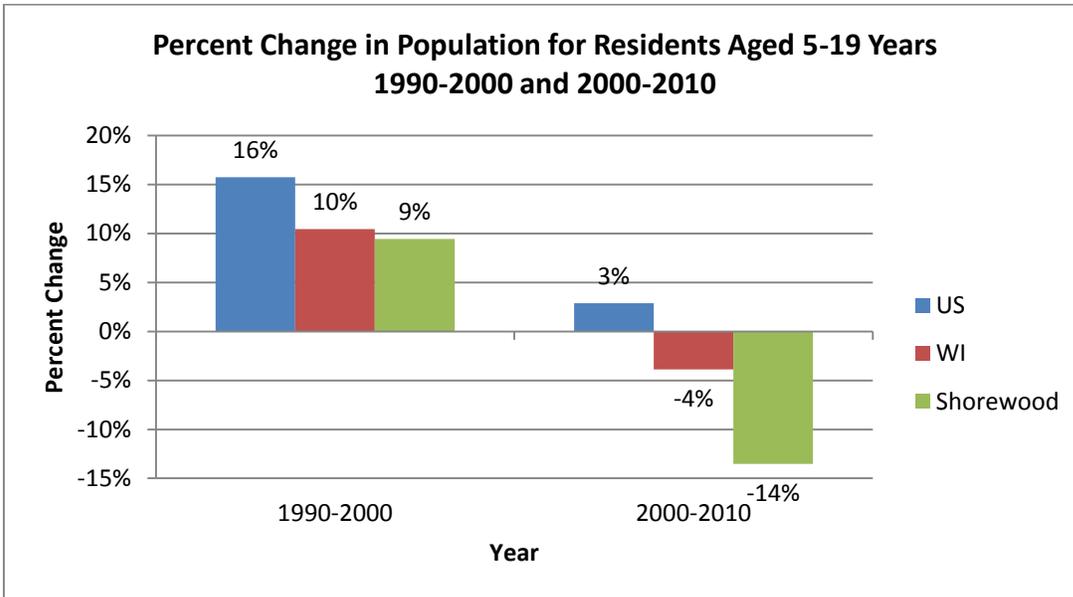
Wisconsin is considered a “sticky” state where Wisconsinites move in and out, and communities do not attract a great number of new residents from other states or countries. This is also true in Shorewood; although the village attracts a greater number of non-Wisconsinites than comparable communities, the percentage is still low.

### School-aged Children

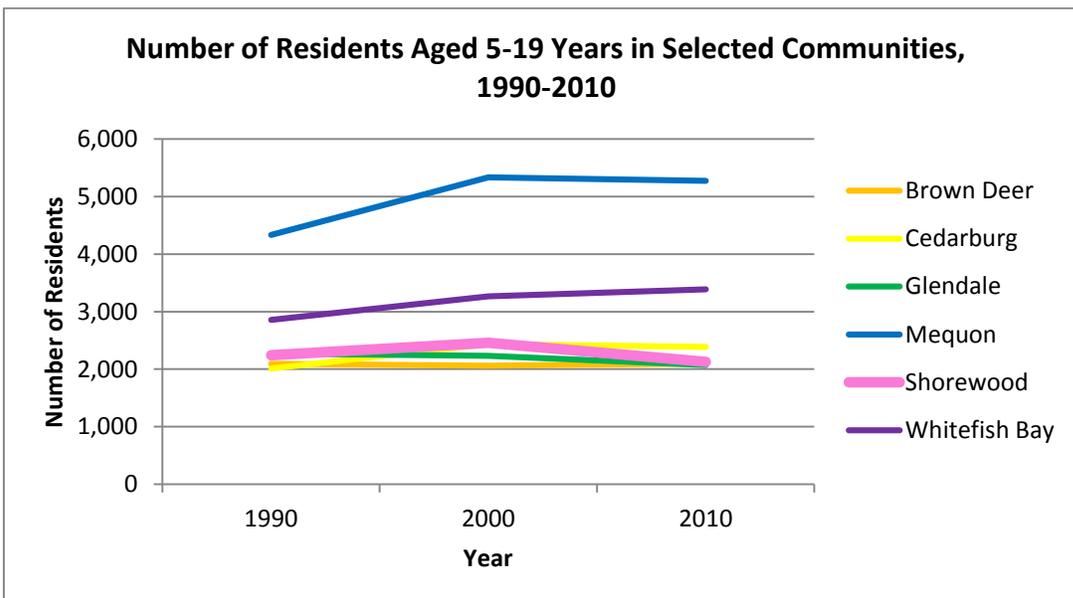
Shorewood is proud that public school students continue to perform well on state tests and the community as a whole wants to attract and retain families with school-age children. The number of children in public school hovers around 2,000. State aid is affected by these numbers, so any drop or rise in public school population affects school funding.

| 2004  | 2005  | 2006  | 2007  | 2008  | 2009  | 2010  | 2011  | 2012  | 2013  |
|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 2,161 | 2,104 | 2,006 | 2,012 | 1,916 | 1,948 | 1,935 | 2,010 | 2,026 | 2,059 |

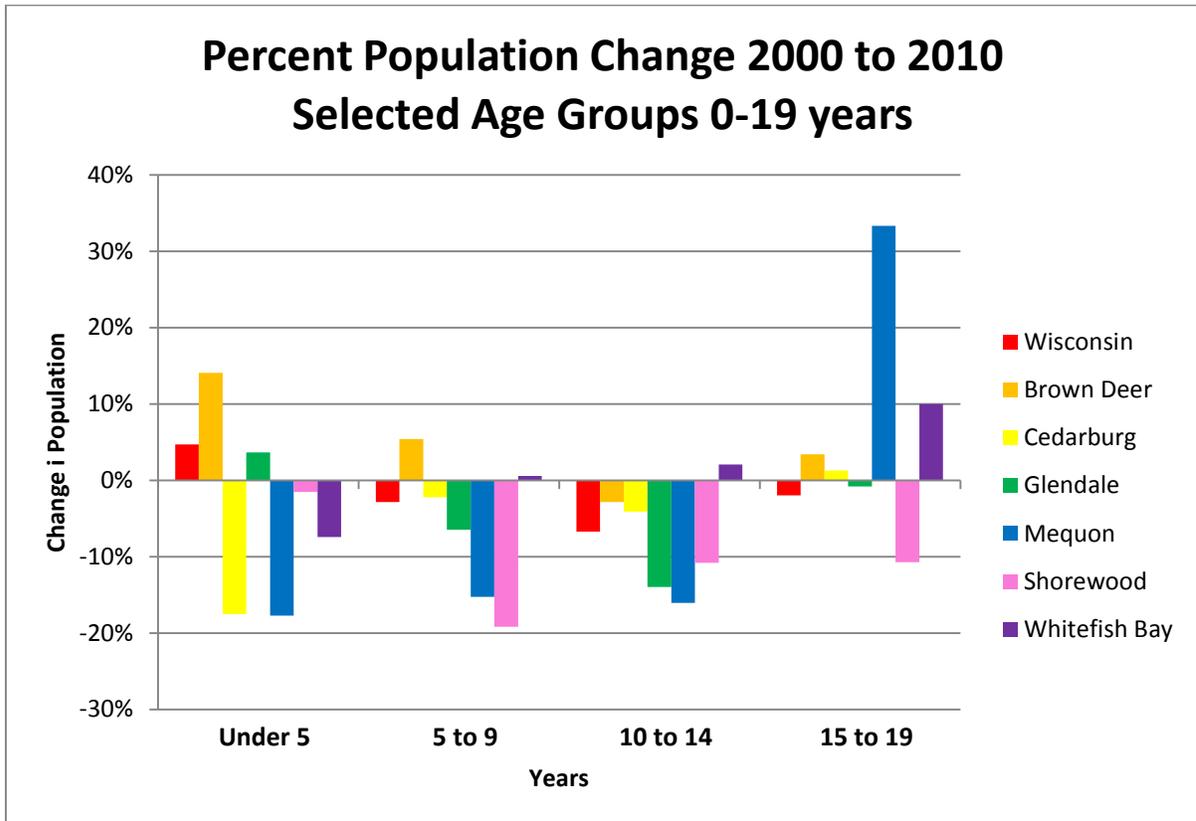
US and WI census trends since 1990 show that Shorewood school-aged children increased in the 90's but decreased dramatically from 2000 to 2010. Shorewood public schools' acceptance of students from outside of Shorewood has moderated this change.



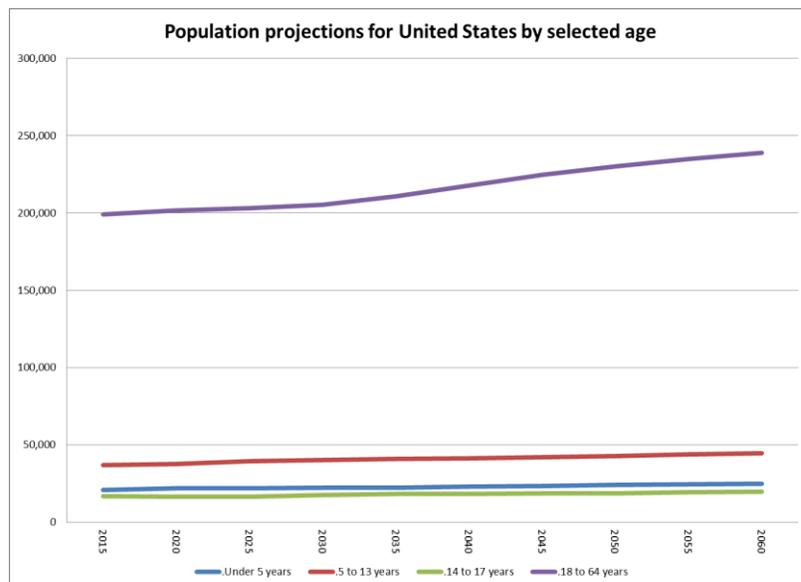
Students in Whitefish Bay and Mequon also perform well on standardized tests, and yet the growth in Mequon children in 1990-2000 did not continue and the more moderate growth in Whitefish Bay did. The growth in school-age children in all communities was fairly flat in the last decade, and this reality is projected to continue.



Interestingly, Shorewood’s 15-19 year olds decreased by over 10% in the last decade while Mequon had more than a 30% growth and Whitefish Bay over 10%. This data suggests that families move when household income has increased enough to support a relocation and the desire for a newer or larger residence is affordable.



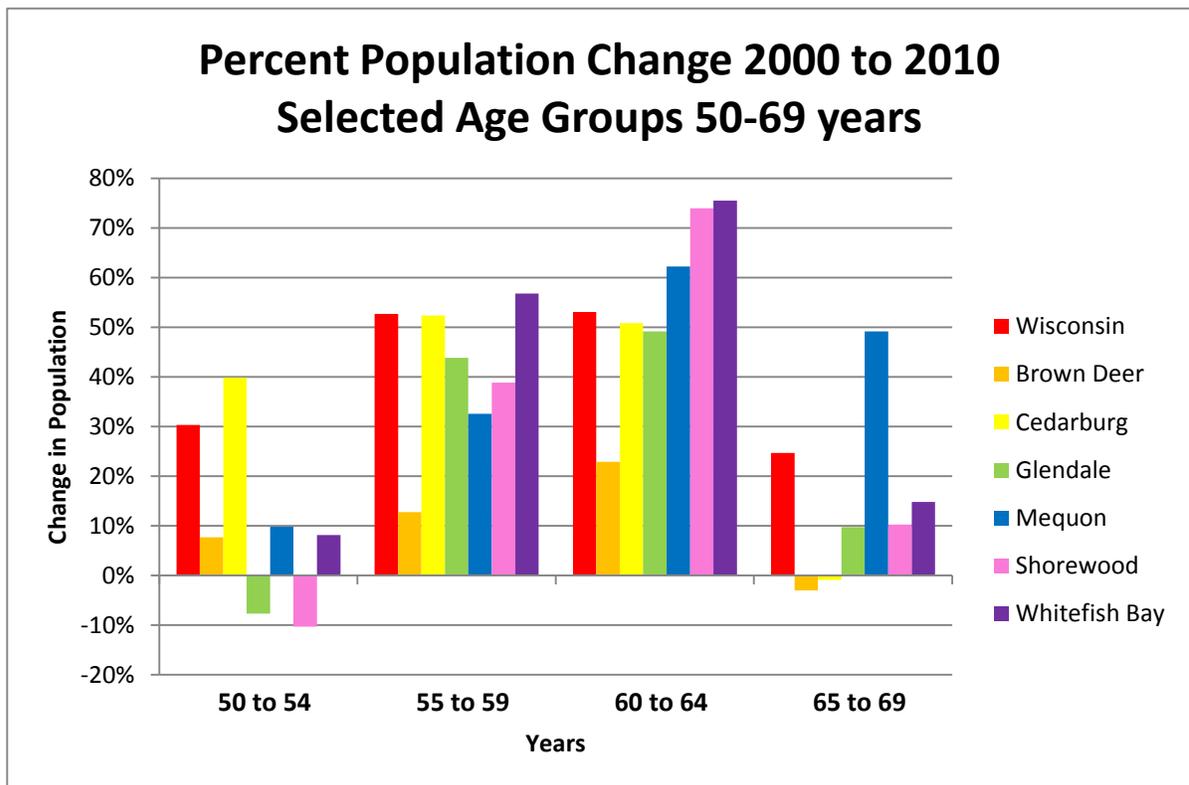
US Census projections for the entire United States into 2060 as shown in the following chart project almost no growth in school-aged children and a continuous increase in adults aged 18-64 years.



This will mean that if Wisconsin continues to use numbers of students in the state aid calculation, communities who want to maintain state funding will be competing for students. Fear of shrinking enrollment is common in and beyond Wisconsin, and large student population growth is often tied to high levels of job growth. In the Milwaukee metro area, competition for filling open enrollment seats or competition to attract/keep families with children in the community will dominate discussions unless something unexpected changes.

### “Baby Boomers”

Adults aged 50-69 represent those who located and have stayed in a community, but they also represent those who move in or out when their children are older or gone from their homes. Shorewood and its selected comparable communities vary in their ability to attract and retain adults aged 50-69 years old as shown in the following chart.



When considering the growth specifically in adults aged 55-64, it is noteworthy that all communities but Brown Deer saw growth of ~ 40% or more. Whitefish Bay and Shorewood led growth in the aged 60-64 demographic with over 70% growth; Mequon had ~60% growth.

### *Age, Lifestyle, and Housing Choices*

The US Census ACS estimates that 65% of Shorewood householders had moved to Shorewood between 2000 and 2005 or later. The following trends are relevant in discussing who has chosen to live in Shorewood and comparable communities.

- Shorewood's total population has steadily decreased from its peak of 16,199 in 1950 to a population of 13,162 in the 2010 census. The last decade's decrease was 4.4%, the same as in Fox Point; Shorewood's percentage decrease in population was greater than other comparable communities.
- Between 2000 and 2010, Shorewood's population declined in all categories except those aged 20-24 (59.4% growth); the largest growth was in those aged 60-64 (74% growth).
  - Wisconsin and comparable communities all showed growth in the 20-24 year old segment; Mequon's 140% increase in young adults dwarfed Shorewood's.
  - Wisconsin and comparable communities all showed growth in the age 60-64 segment, with Whitefish Bay's 75.5% leading the pack. All comparable communities but Brown Deer (23%) grew ~50% or more.
- Although often perceived as an aging community, Shorewood's number of residents 65 and older was 40% lower than in the last decade, continuing the decline noted in 2000. This is different than in Wisconsin where the 65+ population rose 39.4% during the decade.
  - Shorewood's decline was similar to Brown Deer and Glendale's declines.
  - Cedarburg's 65+ population rose 120% and Mequon's 176%.

Census data once again shows that a greater number of Shorewood households are carless (14.5%) than in other comparable communities (all <10% with Mequon and Whitefish Bay < 4%). An additional 42.5% of Shorewood households own just one vehicle, more than double the percentage in Mequon (20.5%) and significantly higher than all other comparable communities (30.6% to 39.8%).

The median home value in Shorewood was \$298,200 in 2010, a 71% increase over 2000. This growth was greater than in all other comparable communities; Whitefish Bay was close at 67% growth. Shorewood's median home value was third highest among the six comparable communities.

Out of 6,619 housing units in Shorewood, 3,642 (55%) were built before 1939.

- 3,695 (56%) of the living units were reported to have only 1-2 bedrooms.
- 2,739 (44%) of the living units were reported to have 3 or more bedrooms.
- 2,555 (38.6%) of the housing units were identified in the ACS as 1-unit, detached structures; another 313 were identified as 1-unit, attached in a single structure.
- 1,119 (16.9%) were identified as having 2-units in a single structure.
- 1,412 (21.5%) were identified as being with 20 or more units in the structure.

Residents of all ages rent in Shorewood for various reasons that include, but are not limited, to lifestyle and investment choices.

- The median household size of owner-occupied housing units (primarily but not exclusively SF homes) is 2.58 persons.

- The median household size of renter-occupied units (frequently but not exclusively apartments or duplexes) is 1.65 persons.
- The greatest growth in renters were in householders between the ages of 15 and 24 (up 62% to nearly 700); ages 55-64 (up 44% to nearly 400); and ages 85 and over (up 41% to ~100).
- The median rent in Shorewood was reported to be \$780 in 2010, a 35% increase over the rent in 2000. Shorewood is second lowest in median rent with Glendale lower at \$777; Mequon has the highest median rent at \$1,228 as well as the highest growth in median rent at 79% over 2000.

### *ESRI Profiles: Lifestyle Segments and BLS Expenditures*

US Census (Census) and Bureau of Labor Statistics (BLS) data is the basis for ESRI's Tapestry Segmentation Area Profile produced for the Shorewood Community Development Authority (CDA) and the Shorewood Business Improvement District (BID). ESRI uses Census and (BLS) data to analyze market realities and potentials based upon their knowledge of the spending potential and preferences of demographic groups. These are then grouped into Tapestry Segments, a means of describing income, lifestyle, and spending patterns.

The following table pulls from the ESRI Tapestry Segment analysis performed for Shorewood.

| <b>ESRI Tapestry Segment</b> | <b>% of Total</b> | <b>Median Age</b> | <b>Median Household Income</b> | <b>BLS Expenditure Quintile (BLS-EQ)</b> | <b>BLS-EQ Ave. Annual Expenditures</b> | <b>BLS-EQ Ave. Annual Housing Expenditures w/o Furnishings</b> |
|------------------------------|-------------------|-------------------|--------------------------------|--|--|--|
| Metropolitans                | 29.2%             | 37                | \$ 53,486                      | 3 <sup>rd</sup>                          | \$ 41,719                              | \$ 13,669  |
| Old and Newcomers            | 20.7%             | 36                | \$ 39,234                      | 2 <sup>nd</sup>                          | \$ 30,603                              | \$ 11,200  |
| Social Security Set          | 13.5%             | 44                | \$ 16,849                      | 5 <sup>th</sup>                          | \$ 23,757                              | \$ 8,218   |
| In Style                     | 10.3%             | 40.5              | \$ 65,387                      | 4 <sup>th</sup>                          | \$ 51,002                              | \$ 15,289  |
| Enterprising Professionals   | 7.6%              | 33                | \$ 63,387                      | 3 <sup>rd</sup>                          | \$ 49,793                              | \$ 15,289  |
| Urban Chic                   | 5.6%              | 43                | \$ 82,524                      | 4 <sup>th</sup>                          | \$ 64,369                              | \$ 17,012  |
| Connoisseurs                 | 5.1%              | 47                | \$ 115,893                     | 1 <sup>st</sup>                          | \$ 57,947                              | \$ 26,345  |
| Suburban Splendor            | 4.4%              | 43                | \$ 115,396                     | 1 <sup>st</sup>                          | \$ 57,698                              | \$ 26,345  |

| ESRI Tapestry Segment | % of Total | Median Age | Median Household Income | BLS Expenditure Quintile (BLS-EQ) | BLS-EQ Ave. Annual Expenditures | BLS-EQ Ave. Annual Housing Expenditures w/o Furnishings |
|-----------------------|------------|------------|-------------------------|-----------------------------------|---------------------------------|---|
| Sophisticated Squires | 3.6%       | 40         | \$ 83,069               | 4 <sup>th</sup>                   | \$ 64,802                       | \$ 17,012   |

ESRI's use of data to develop a retail market profile helps us understand how age, income, and lifestyle choices affect the vibrancy of Shorewood.

- 29.2% of residents are in the Metropolitans segment with a median age of 37 and median household (HH) income of \$53,486. They live in a variety of single-family detached and attached housing units as owners and renters; they are visible, active, and often influential in civic life.
- 20.7% are categorized as Old and Newcomers. Their median age of 36 splits the difference between the young adults just beginning their careers and those retiring. They frequently rent and enjoy an unencumbered lifestyle with a median HH income of \$39,234.
- 13.5% of residents are identified as the Social Security Set with a median age of 44 and median HH income of \$39,234 who have less to spend on housing and goods/services. As a group, they are not known for joining groups and participating in civic life.

The remaining six ESRI segments make up the remaining ~37% of Shorewood's residents. Well-educated and successful, these residents have the capacity to spend money locally and the ability to choose to spend it elsewhere.

- The 23.5% in the In Style, Enterprising Professionals, and Urban Chic segments all have upscale lifestyles and median HH income of \$63,837 to \$82,524. They live in a variety of housing styles and are both homeowners and renters. They enjoy a near-city lifestyle and are active, fit, tech savvy, and travelers.
- The 13.5% of residents identified as high society lifestyles are categorized as living in Connoisseurs, Suburban Splendor, or Sophisticated Squires neighborhoods. Connoisseurs commonly own detached single family homes in densely populated city centers. Median HH incomes range from \$83,079 to \$115,893 and includes investment and rental income beyond wages from high-paying jobs or self-employment income. These lifestyles benefit from local and metro-Milwaukee jobs, entertainment and recreational assets, and access to the airport for business and pleasure travel.

### Workshop Consideration of ESRI Profiles

Workshop participants were given basic information from the ESRI study and “Shorewoodville” money to spend proportionate to their segment representation in Shorewood. They were asked whether Shorewood would be where residents choose to spend all, or even most, of their dollars on food away from home, apparel, entertainment/recreation, home and reading and “spent” proportionate shares of their money accordingly.

Participants hypothesized that the greater number of lower quartile spenders in Shorewood were influential in the market due to their combined numbers rather than their individual level of expenditures, and that upscale lifestyle segments had a greater capacity to spend outside of Shorewood than a less mobile Social Security Set might, for example.

The workshop spending game reflected some of the realities of business in Shorewood. Shorewood was thought to capture 60% of the available money that *would* be spent by residents on food away from home and over 60% of that spent on personal care services. Although participants expressed that they would like to have high quality apparel stores in Shorewood, they “spent” just 35% of their dollars at home and articulated that they could find good shopping nearby. Despite their desire for a Shorewood book store, books and other reading materials expenditures kept less than 25% of the available money in the village, and the Internet and stores nearby captured a greater market share.

The following table shows the available dollars (BLS expenditure dollars adjusted for tapestry segment percentage of total population) and how workshop participants decided to distribute those dollars. (See attached workshop report for further details.)

| ESRI Segment               | %    | Food Away from Home |            |            | Entertain/Recreation |               |            | Apparel & Services |            |            | Personal Care |            |            | Reading   |             |            | Home Furnish/Equip |               |            |
|----------------------------|------|---------------------|------------|------------|----------------------|---------------|------------|--------------------|------------|------------|---------------|------------|------------|-----------|-------------|------------|--------------------|---------------|------------|
|                            |      | Available           | Wkshp Ave  | %          | Available            | Wkshp         | %          | Available          | Wkshp      | %          | Available     | Wkshp      | %          | Available | Wkshp       | %          | Available          | Wkshp         | %          |
| Metropolitans              | 29.2 | 413                 | 200        | 48%        | 413                  | 130           | 31%        | 282                | 85         | 30%        | 107           | 75.5       | 71%        | 20        | 3.75        | 19%        | 248                | 37.5          | 15%        |
| Old & Newcomers            | 20.7 | 222                 | 205.5      | 93%        | 224                  | 23.5          | 10%        | 157                | 58         | 37%        | 56            | 32         | 57%        | 10        | 4.25        | 43%        | 129                | 32.25         | 25%        |
| Social Security Set        | 13.5 | 99                  | 63.5       | 64%        | 88                   | 47            | 53%        | 76                 | 19         | 25%        | 34            | 21         | 88%        | 5         | 2.25        | 45%        | 50                 | 20            | 40%        |
| In Style                   | 10.3 | 180                 | 97.5       | 54%        | 176                  | 37.5          | 21%        | 119                | 32.5       | 27%        | 44            | 22.25      | 51%        | 8         | 1.25        | 16%        | 104                | 21            | 20%        |
| Enterprising Professionals | 7.6  | 133                 | 71.25      | 54%        | 130                  | 47.5          | 37%        | 88                 | 20         | 23%        | 32            | 18         | 56%        | 6         | 0.25        | 4%         | 77                 | 24.25         | 31%        |
| Urban chic                 | 5.6  | 116                 | 73.75      | 64%        | 116                  | 40            | 34%        | 74                 | 32.25      | 44%        | 28            | 21.5       | 77%        | 5         | 2.5         | 50%        | 68                 | 11.25         | 17%        |
| Connoisseurs               | 5.1  | 175                 | 76.25      | 44%        | 171                  | 46.25         | 27%        | 111                | 53.75      | 48%        | 41            | 12.75      | 31%        | 7         | 0           | 0%         | 101                | 26.25         | 26%        |
| Suburban Splendor          | 4.4  | 151                 | 92.5       | 61%        | 147                  | 40            | 27%        | 96                 | 60.25      | 63%        | 35            | 26.25      | 75%        | 6         | 0.5         | 8%         | 87                 | 16.75         | 19%        |
| Sophisticated Squires      | 3.6  | 74                  | 54.75      | 74%        | 75                   | 20            | 27%        | 48                 | 11.25      | 23%        | 18            | 14.75      | 82%        | 3         | 0.75        | 25%        | 44                 | 2.5           | 6%         |
| <b>TOTAL</b>               |      | <b>1563</b>         | <b>935</b> | <b>60%</b> | <b>1540</b>          | <b>431.75</b> | <b>28%</b> | <b>1051</b>        | <b>372</b> | <b>35%</b> | <b>385</b>    | <b>244</b> | <b>63%</b> | <b>70</b> | <b>15.5</b> | <b>22%</b> | <b>908</b>         | <b>191.75</b> | <b>21%</b> |

### Municipal Services and Priorities

Essential municipal services are expected to continue into 2025, and the current manager and staff pursue efficiency initiatives and collaboration with other local governmental units.

The 2015 Vision Implementation Plan has focused village initiatives on strategic priorities; staff and volunteers have moved Shorewood closer to its vision of a successful future. Special interest village committees and community volunteers working to accomplish specific municipal priorities has grown and should continue to grow with encouragement from the village, the current boosters, and both current and future Metropolitans that Shorewood should continue to attract.

Feedback from the 2013 Community Survey indicates broad approval of village accomplishments.

Several initiatives in the plan, such as maintaining buried infrastructure, though a priority, are expensive. Shorewood buildings will continue to age. As there are no active plans to replace

or redevelop specific village buildings, maintenance will be important. Shorewood's 30 year streets plan should allow continuous renewal of street surfaces. Alleys will continue to age until a plan is finalized and funding secured.

Replacing the combined storm/sanitary system is a clearly understood and accepted priority that will also be expensive for private property owners required to replace laterals. Assessments to private property owners for upgrades to the shared system's cost may be politically difficult to accomplish. Others, like financial support for public transportation improvements and redevelopment projects are not under direct local control and will require staff and volunteer time and commitment to influence.

Strict levy limits instituted by the state legislature in the 2011-2012 Biennial Budget and subsequent actions to limit the use of user fees will continue to create funding challenges for Shorewood.

The increasing numbers of adults and fairly flat number of children in the US and Wisconsin will be the pool from which Shorewood will attract residents. Shorewood public schools should continue to feel the pinch of tight per-student state funding, and a steady or declining number of school age and especially high school age children in the village should continue to be softened by students attracted to Shorewood from outside the district.

Although the percentage of Wisconsin and US adults aged 80+ should continue to grow, Shorewood's share should continue to decrease unless a senior housing project brings in more frail elderly.

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## Where do we want to go?

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Vision project participants were consistent in their belief that Shorewood in the future should be similar to Shorewood in the present, only better.

Shorewood wants to maintain its quality urban lifestyle that is less “big city” and more “small village” where knowing your neighbors and serving your community and others is appreciated, cultivated, and easy to do.

Shorewood residents want to be near enough to Milwaukee to easily enjoy its amenities while living in safe neighborhoods filled with friendly faces, green trees, and great homes.

Shorewood wants to be a walkable community with alternative transportation options that include bike trails/lanes and a strong transit system.

Shorewood wants to have successful neighborhood stores, service providers, and restaurants, but residents also want to patronize good area restaurants and shop at strong regional malls.

Shorewood wants excellent and efficient public services, good public facilities, and well-maintained public infrastructure including an excellent public education system.

The Village Board and Manager considered these commonly-held beliefs, previous project planning and implementation work, new information gathered, and ideas generated. They developed and refined the following statements to express an inspiring vision of Shorewood’s future.

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## 2025 Vision Statement

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In 2025, Shorewood will be:

A vibrant urban community with:

- Safe, friendly neighborhoods offering desirable housing options that attract diverse people of all ages and stages of life;
- Opportunities to work in and to grow successful profit and non-profit businesses in and near Shorewood;
- Attractive and thriving local service, retail, and hospitality businesses;
- Excellent local schools and easy access to world-class centers of culture and higher education;
- Strong multi-modal transportation infrastructure that meets transportation needs.

A welcoming community embracing new people and innovative ideas, engaging with others to continuously improve Shorewood and the Milwaukee metro area.

A healthy community with clean air and water; access to excellent medical services; and businesses, facilities, spaces, and programs that promote personal health and wellness.

An ecologically-responsible community with an appreciation for the lake, river, and other natural areas and a commitment to sustainability.

A financially responsible community with suitable and well-maintained public buildings and infrastructure, strong property values, a competitive tax rate, and a commitment to public service excellence.

A well-governed community with leaders and citizens who value broad civic participation and maintain a long-range, disciplined view of the future.

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## How do we get there?

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Barbara Grant shared strategic principles introduced in futurist and economist Rebecca Ryan's book, Regenerist, and two articles: "Gigs, Gazelles, and Makers" for the *Economist*, and "Relocating? Four Keys in Choosing a Great City" for *Cities*. (See [nextgenerationconsulting.com](http://nextgenerationconsulting.com).)

Ryan, resident futurist for the Alliance for Innovation, considers the current long recession one of a handful of historic events in American history. She encourages investing now in order to be ready for the "spring thaw" when the extended recession and subsequent restructuring of society's beliefs, values, and behaviors is over in 2020.

Shorewood should be able to capitalize on what Ryan believes will be the growth of "metro renters," young adults and childless older adults, as that is who Shorewood is currently attracting and serving. Shorewood is also well-positioned to anticipate and accept greater numbers of "grayer, browner, younger, anxious, and digitally active" people that is the UW demographic trend. She points out we will all be using smaller, more mobile, and smarter technology.

The Village Board developed goals and specific strategies to the 2025 Vision Statements to direct the development of a Vision Implementation Plan. These goals and objectives have been added to the Vision Statements to create the 2025 Vision Implementation Plan as seen below.

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*2025 VISION IMPLEMENTATION PLAN GOALS AND STRATEGIE*

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*In 2025, Shorewood will be:*

*A vibrant urban community with:*

- **Safe, friendly neighborhoods offering desirable housing options that attract diverse people of all ages and stages of life;**
  - Goal: Be the safest urban Milwaukee suburb.
    - Provide pro-active and responsive police services
    - Provide pro-active and responsive fire and emergency medical services
    - Engage community in creating safe homes, neighborhoods, and business environments
  - Goal: Be the urban Milwaukee suburb with a reputation for friendly and welcoming neighborhoods.
    - Increase Shorewood's social capital within neighborhoods, village, and region
  - Goal: Lead the region in providing a variety of desirable housing options
    - Protect and add to the number of architecturally pleasing residential exteriors.
    - Protect the structural integrity of all housing units.
    - Diversify types of residential housing units.
    - Encourage market-appropriate interior improvements in older housing units.
    - Encourage renovation/replacement of substandard housing units
    - Minimize code and process impediments to property maintenance.
- **Opportunities to work in and to grow successful profit and non-profit businesses in and near Shorewood.**
  - Goal: Develop/support businesses in/near Shorewood that improve the economic health of Shorewood and the Milwaukee metro area.
    - Retain, attract, and develop successful businesses.
  - Goal: Develop/support non-profit business and institutions in/near Shorewood.
    - Develop partnerships that will support successful cultural institutions.
    - Develop partnerships that will support successful educational institutions.
  - Goal: Support start-up and permitted home-based businesses
    - Encourage development of appropriately supportive spaces.
    - Support artists with storefront retail potential
- **Attractive and thriving local service, retail, and hospitality businesses;**
  - Goal: Increase number of jobs and total sales

- Increase inventory of market-appropriate business spaces.
  - Goal: Help drive customer traffic to businesses.
    - Market Shorewood to potential customers
    - Increase convenient access to businesses
- **Excellent local schools and easy access to world-class centers of culture and higher education;**
  - Goal: Be an educated and culturally aware community where people want to live.
    - Develop lifelong learning opportunities and programs in/near Shorewood.
    - Support local public and private school success.
  - Goal: Invest in multi-modal transportation infrastructure that meets transportation needs.
    - Invest in local transportation infrastructure tied to regional systems
    - Provide safe, well-maintained streets.
    - Provide a variety of strong alternative transportation options
  - Goal: Be a leader in the use of non-auto transportation methods.
    - Brand the village as a community whose residents, businesses, and visitors extensively use non-auto transportation
    - Promote use of bicycles

***A welcoming community embracing new people and innovative ideas, engaging with others to continuously improve Shorewood and the Milwaukee metro area.***

- Goal: Be a welcoming community.
  - Welcome all newcomers to Shorewood.
  - Market Shorewood to targeted demographics
- Goal: Offer and celebrate opportunities to connect with and serve others
  - Facilitate neighbors getting to know each other.
  - Encourage participation in community activities and organizations
- Goal: Be a regional leader in innovation and creative initiatives
  - Test new and innovative ideas designed to improve Shorewood and the Milwaukee metro area.

***A healthy community with clean air and water; access to excellent medical services; and businesses, facilities, and programs that promote personal health and wellness.***

- Goal: Rank at the top of comparably-sized Wisconsin communities as measured by public health and personal wellness indicators.
  - Develop clean air and water policy and programs to improve local air and water indices
  - Reduce number of air quality watches and advisories

- Support and expand access to high-quality medical facilities & services
- Promote personal health and wellness
  - Recruit businesses and non-profits catering to personal health and wellness
  - Expand public recreation amenities (parks & recreation programs)
  - Promote proper use/disposal of prescription drugs

***An ecologically-responsible community with an appreciation for the lake, river, and other natural areas and a commitment to sustainability.***

- Goal: Rank at the top of comparably-sized Wisconsin communities when measured by formally developed standards of ecological practices
  - Develop policies and practices to support Shorewood's sustainability plan
- Goal: Residents are actively engaged in utilization and stewardship of the lake, river, and other natural areas
  - Promote ecological awareness
  - Promote use of lake, river and natural areas

***A financially responsible community with suitable and well-maintained public buildings and infrastructure, strong property values, a competitive tax rate, and a commitment to public service excellence.***

- Goal: Be a financially responsible community.
  - Integrate financial management with community needs to increase market value of real estate.
  - Deliver efficient and effective municipal services
- Goal: Serve the community with well-maintained public buildings and infrastructure
  - Maintain capital improvement and maintenance plan that provides a sustainable, "steady state" annual commitment

***A well-governed community with leaders and citizens who value broad civic participation and maintain a long-range, disciplined view of the future.***

- Goal: Commit to open and interactive involvement of all residents and property owners in civic responsibilities
  - Establish effective communication tools and methods
  - Assure effective committee & commission participation
  - Assure effective participation thru leadership development
- Goal: Regularly develop and update long range plans that have had leaders and citizens participating in the process
  - Maintain commitment to annual plan development process

### ***2025 VISION IMPLEMENTATION PLAN – FUTURE STEPS***

Barbara Grant initially assisted the village manager and staff in developing implementation plan objectives and tactics for each of the strategies identified in this Vision Plan. This work will be reviewed and approved by the Board and will not be part of this report.

The 2025 Vision Implementation Plan will be regularly revised as work progresses on the Vision Implementation Plan and both successes and challenges unfold. The village will always have the most current version.

#### *Final Thoughts*

Community visioning for Shorewood has always been a participatory process grounded in reality. Since 2005, the Board and community participants have asked: “Where are we now? Where are we going? Where do we want to be? How do we get there?”

By answering these questions and developing specific implementation steps to assure success, visioning in the Village of Shorewood has concentrated municipal and community resources in a strategic manner, and work has been focused with a long-range and disciplined view of the future.

By Barbara Grant

## ***Attachment I: Vision 2025 Focus Group Report***

On October 15 and 16, 2013, facilitator Barbara Grant met with 51 citizens who represented specific demographic groups whose points of view might not be captured in a community workshop discussion.

### ***Young Adults/Professionals***

Fourteen young adults aged 25 to 40 participated in an evening focus group held at Big Bay Brewing Company. Represented were renters and homeowners who were single, engaged, and married; with or without children; and in Shorewood for two months to many years. Though generally from Wisconsin, several moved here from out of state. Though generally economically well-off, some were not as comfortable.

### **Housing**

Homeowners in this group reported spending a fair amount of time finding a house that met their needs, and all lamented the small number on the market; one looked for two years. Interior upgrades, especially kitchens, were a welcome choice when available. They considered property ownership an investment in what they consider an appreciating market. Finding a starter home was reported to be easier than finding a four bedroom/two bath home in which to raise a family.

Renters in this group came because of the relative affordability of this housing choice.

- Some planned to move up to home ownership thru buying a duplex and renting one unit to offset the cost or to rent both and use the income to help finance a single-family home mortgage.
- Some found the two-bedroom apartment option affordable, though some reported even this was a struggle.

Both homeowners and renters commented that young professionals might start by renting or buying a starter home in Shorewood, but at ages 35-40, they look to move up. This might mean moving out of Shorewood by choice or thru lack of housing availability.

Most participants reported their families lived within easy drive distance (~ one hour) and all had friends who lived closer (~ fifteen minutes).

### **Life Style Preferences**

This group likes the Shorewood schools and safe, urban life style with unique houses and attractive neighborhoods. Specifically mentioned were walking on sidewalks and using the area bike trails, small lot sizes (not suburban lawn tractor sizes), children in neighborhoods, and enough things to do.

The “friendliness” factor was considered an important quality of life preference. They like having friendly but not too nosy neighbors. They are open to developing social groups in the neighborhood if the option presented itself, but they do not expect neighbors to be their primary social group.

Participants generally prefer independent restaurants over chains and would like more good quality, mid-range options (including ethnic food) that would also offer take-out in Shorewood. They reported driving to Bayview for food.

They think that the village website provides good promotions on things to do, and like the text alert options available.

One female participant expressed concern about an uptick in crime that was not being appropriately reported.

### **Recommendations**

Participants recommended that the village recruit other young professionals to rent and then own in Shorewood by marketing to “feeder schools” (Milwaukee professional schools) by offering weekly events with drinks at Shorewood bars, for example, to encourage other YP’s to move to Shorewood.

Most supported the development of a Farmer’s Market proposed by one member. Another suggested a zip car sharing option.

### ***Neighborhoods***

Eight residents, neighborhood homeowners, renters, and landlords as well as of award-winning Shorewood Connects Neighborhoods, participated in a morning focus group held at Village Hall. Some were new residents while others were longer term residents.

Participants reported that a robbery created a sense of vulnerability that brought them together, making their neighborhood safer and their ties stronger. Beyond feeling they could ask for a cup of sugar from a neighbor, they annually exchanged names, addresses, and phone numbers as well as recommendations regarding babysitters and contractors.

### **Housing**

Shorewood’s housing had varied and appropriate price points for each participant; homes were urban in character and located close to Milwaukee.

They believe that “rentals are here to stay,” especially for women. The rental market is very strong with renters responding to simple property signs and word-of-mouth advertising.

### **Preferences**

Participants expressed a preference for neighborhoods that were not homogeneous and for strong schools their kids can walk to.

They consider the “friendliness” factor important to quality of life. They all value the concrete sense of community that they have developed through their neighborhood groups; they sympathized with one participant who tried to develop a program but failed.

Shorewood’s walkability was valued not only for the convenience of children walking, but also for the independence and personal safety skills (street-smarts) it develops.

They like hanging out in front yards, an urban rather than a suburban back yard model.

### **Recommendations**

They recommended developing ties neighborhood by neighborhood and supporting the Welcome Neighbors program.

Participants recommended giving financial encouragement to property owners to upgrade their property and incentives to comply with garage and green space zoning code requirements, not limiting incentives to businesses. They expressed mild concern about the reputation of village inspectors.

They proposed public bids for work on private property so that lower costs could be shared by those replacing windows, for example, similar to what is done for sidewalks.

They supported and recommended planning for seniors to “age in place.”

### ***Seniors***

A meeting of fifteen seniors was held at Village Hall on the morning of October 16. This lively and engaged group of residents shared their stories of choosing to live in Shorewood. Most had lived in Shorewood for more than twenty years; one lived here all her life. Some had lived here, moved out, and moved back recently. Two had moved from a single-family home in Milwaukee to apartments in the Fountainview.

There were more duplex and apartment dwellers at the meeting; several who owned single family homes were considering staying in Shorewood but down-sizing.

Participants spoke about how their lives and choice of homes have changed over time and how they are planning for their future needs.

### **Housing**

Owners of single family homes in the group were planning to move only when they have to and getting help from family or contractors to do physically difficult work. One owner was worrying about the cost of upkeep and taxes during a time of temporary disability. Another moved into a Shorewood duplex twelve years ago and then bought a small house in which she plans to stay as long as she can. One widow had a friend move in with her.

One condo owner reported that 1/3 of the condos were now housing students; this was not her expectation when joining a homeowners association building.

Those who had already made the decision to move out of a single family home and downsize were happy with their choices. One bought a duplex with her sister. Two sold their Milwaukee single family homes to move into the Fountainview and both loved the double balcony arrangement; one noted that she appreciated the age diversity in the complex. A couple who had lived in what they called a suburban “prison” with their son and daughter-in-law were sure they would never move from River Park.

### **Preferences**

Participants were enthusiastic supporters of the Senior Center and its director and enjoyed and used the library. Several said they enjoyed and used the fitness center and valued the Osher Lifelong Learning Institute run by the UWM School of Continuing Education.

### **Recommendations**

Improve the safety at the Edgewood/Oakland corner's right turn lane by extending the light or posting it as "no right turn."

Alleviate barriers to walking during the winter by cleaning the crosswalks of snow.

Regulate bikes on the sidewalks, especially on the narrow Oakland sidewalks.

Improve skateboarder safety by prohibiting riding them on streets, especially on streets at night without reflectors.

### ***Boosters***

Nine Shorewood residents representing various community groups met at Village Hall on October 16. Groups included but were not limited to the Shorewood High School Alumni, Welcome New Neighbors, Shorewood School District, Shorewood Connects, Shorewood Foundation, Shorewood Historical Society, Shorewood Business Improvement District, King's Lutheran Church, Lutheran, Village Conservation Committee, and the Women's Club; other groups represented were too numerous for participants to detail.

### **Housing**

Housing options were not discussed, although marketing Shorewood's strengths to real estate agents was discussed.

They are aware and sensitive to the needs of young adults who can't afford even duplex housing with a patch of grass, the low quality of some rental properties, the concentration of landlords, and the lack of convenient parking for those living in apartments.

### **Preferences**

Boosters love being active in the community and seeing their efforts improve the quality of life in Shorewood.

They like having places to meet and interact; these include not only coffee shops for person-to-person interactions, but also the schools, churches, parks, and other larger-venue places to share community activities and create connections. Churches allow other non-profit groups to use their buildings and parking lots so that they can serve the greater Shorewood community.

Boosters see Hubbard Park and the Nature Preserve as community assets for individuals as well as for families and community groups wanting to gather together.

### **Recommendations**

Because boosters value volunteering, they suggest creating opportunities to volunteer with a low barrier to entry, a limited time to commit, an defined purpose, and a variety of activities. Shorewood Connects' Fall Clean Up is just such a volunteer opportunity.

Participants expressed disappointment that significant initiatives begin with enthusiasm and booster buy-in, as did the Atwater plan, and then fail at the implementation stage due to lack of adequate funding and volunteer burn-out. More pre-planning to secure significant financing and showing appreciation to volunteers who help implement the plan could help.

Participants feel that Shorewood's snow removal program is not working at corners, in the business district, and near student rentals and that this should be corrected.

Boosters support continuing the Welcome New Neighbors program.

They suggest improving the Fitness Center signage to encourage greater awareness and use.

### ***Business Owners***

Seven small business owners met at Village Hall on October 16. Two were artists who worked from home or in, three had consulting businesses, and two had retail shops not within the Business Improvement District.

### **Housing**

Space needs for home-based businesses varied but usually included an Internet connection and an office. This group suggested there might be as many as 200 home-based businesses in Shorewood, many of whom fear being taxed on their inventory and business equipment including computers or being prohibited from working at home if the village knew of their existence.

Their homes do not provide a place to meet with clients in a professional setting.

### **Preferences**

All loved living and working in Shorewood but were isolated. The Internet provided marketing and collaboration on-line, but meeting in person to collaborate and network was sometimes preferable.

All were interested in one business's use of Regus virtual office services to receive and hold deliveries and provide a professional space to work and/or meet with clients. This international firm provides flexible work spaces, telephone answering/forwarding services, video conferencing, meeting rooms, etc.

### **Recommendations**

Discussion centered on how a coffee shop front in Shorewood with office and meeting space behind might improve their business and quality of life.

## ***Attachment II: Vision 2025 Community Workshop Report***

Approximately 25 participants in the November 9th workshop at Shorewood Intermediate School listened to a PowerPoint presentation presented by Barbara Grant that reviewed the 2005/2009 vision statements, implementation plan objectives, and selected data selected to develop understanding of “What Is” in Shorewood. (See Attachment)

She led activities designed to spark discussion over whether the 2015 Vision had been achieved, and whether plan statements or objectives should be revised in light of the data. Presentation highlights included:

1. ~ 65% of residents moved to Shorewood since 2000.
2. There was a slight decrease in household families, in households with children under 18, and in householders who live alone. There was a slight increase in renters.
3. The drop in school aged children aged 5-9 (19%) and 10-19 (11%) was significant; the number had increased during the previous decade.
4. The percentage increase in adults aged 55 to 64 was significant, but not as great as among some comparable communities.
5. The US population distribution by age has changed over time since 1900 and is expected to flatten into 2060 with some growth in the number of adults but not in children.
6. Wisconsin is a “sticky state” with most residents staying put/moving around the state, but is not a great attractor; Shorewood fairs slightly better than comparable communities in attracting new state residents.
7. Renters of many ages are finding homes in Shorewood.
8. Most Shorewood single family homes do not meet the space and configuration standards of new homes or the needs of many household families.
9. Home values strengthened better in Shorewood from 2000-2010 than among Shorewood’s comparable communities.
10. Median rent was no longer lowest among comparable communities and median rent grew faster than in Brown Deer and Cedarburg.
11. Shorewood’s resident entrance and exit surveys suggest that over half of residents rent and then buy property in Shorewood. They report they are attracted by jobs and schools and are disheartened by taxes, cost of living, and lack of parking.

In order to better understand who is moving to Shorewood and how they might contribute to the vibrancy of Shorewood, participants were asked to consider ESRI Tapestry Segmentation Area Profiles that use basic census and consumer spending data to describe what socioeconomic groups presently live in Shorewood and how they are likely to spend their money.

A synopsis of the ESRI categories given to participants are as follows:

| ESRI Segment               | % HH  | Partial Description   |
|----------------------------|-------|---|
| Metropolitans              | 29.2% | <ul style="list-style-type: none"> <li>Residents prefer to live in older city neighborhoods. Approximately half of these households are singles who live alone or with others; 40 percent are married-couple families; the median age is 37 years.</li> <li>Half of the residents who are employed work in professional or managerial positions. The median household income is \$53,486.</li> </ul>  |
| Old and Newcomers          | 20.7% | <ul style="list-style-type: none"> <li>Residents of these transitional neighborhoods are either beginning their careers or retiring... Their median age of 36.3 years splits this disparity. There are more singles and shared households than families in these neighborhoods.</li> <li>The median household income of \$39,234 is below the US median. Educational attainment, college, and graduate school enrollment are above average.</li> </ul>  |
| Social Security Set        | 13.5% | <ul style="list-style-type: none"> <li>Four in ten householders are aged 65 years or older; the median age is 44 years. Most of them live alone.</li> <li>The median household income is \$16,849. Eight percent of households rely on public assistance; 16 percent receive Supplemental Security Income. Thirty-seven percent attended college; 16 percent hold a bachelor's or graduate degree.</li> </ul>   |
| In Style                   | 10.3% | <ul style="list-style-type: none"> <li><i>In Style</i> residents live in the suburbs but prefer the city lifestyle. Households without children (married couples without children, single-person, shared, and other family types), comprise more than two-thirds of all households. The population median age of 40.5 years.</li> <li><i>In Style</i> residents are prosperous, with a median household income of \$65,387 and are more educated compared to the rest of the US.</li> </ul>   |
| Enterprising Professionals | 7.6%  | <ul style="list-style-type: none"> <li>Young, educated, single, married, working professionals, residents of <i>Enterprising Professionals</i> neighborhoods have a median age of 32.8 years. Forty-three percent of the households are singles who live alone or share housing with roommates, and 43 percent are married couple families.</li> <li>Median household income is \$63,837. This is an educated group: approximately half of the population aged 25 years and older hold a bachelor's or graduate degree; more than three in four have attended college.</li> </ul>               |
| Urban Chic                 | 5.6%  | <ul style="list-style-type: none"> <li><i>Urban Chic</i> residents are professionals who live a sophisticated, exclusive lifestyle. More than half of these households are married-couple families, similar to the US proportion. Fewer than half of them have children</li> <li>Their median household income is \$82,524 and median age is 42.7. They are well-educated; more than half of residents aged 25 years and older hold a bachelor's or graduate degree; 80 percent have attended college. Twenty percent of these households earn income from self-employment ventures.</li> </ul> |
| Connoisseurs               | 5.1%  | <ul style="list-style-type: none"> <li>Residents of <i>Connoisseurs</i> neighborhoods are somewhat older, with a median age of 47.2 years. Approximately 70 percent of the population is married. Although residents appear closer to</li> </ul>  |

retirement than child-rearing age, 30 percent of the households are married couples with children living at home.

- This market is well educated; 64 percent of the population aged 25 years and older hold a bachelor’s or graduate degree. Employed residents earn wages from high-paying management, professional, and sales jobs. Many are self-employed; the rate is twice that of the national average. They have a median household income of \$115,893 and supplement their salaries with income from interest, dividends, and rental properties.

Suburban Splendor 4.4%

- *Suburban Splendor* residents are generally married couple families with and without children. The median age is 43.1 years, and half of the population is aged 35–64 years.

- These successful suburbanites are the epitome of upward mobility. They have a median household income of \$115,396. Labor force participation rates are high for both men and women; many households are two income. Well educated, more than half the population aged 25 years and older hold a bachelor’s or graduate degree.

Sophisticated Squires 3.6%

- Residents of *Sophisticated Squires* neighborhoods enjoy cultured country life on the urban fringe. More than 40% of the households are married couples with children that range from toddlers to young adults. The median age is 39.7 years.

- These residents are educated; more than one-third of the population aged 25 years or older holds a bachelor’s or graduate degree; another third has attended college. The median household income is \$83,079.

Participants were grouped around tables and individuals were asked to represent a specific ESRI segment in an exercise designed to reveal the potential commercial impact of residents’ spending on food away from home, entertainment & recreation, apparel & services, personal care, and reading. Spending estimates were based on Bureau of Labor Statistics data.

Participants were asked to place Shorewoodville bills (\$1 Shorewoodville = \$100,000 US adjusted by % of segment) on a spending chart using their tapestry segment description as guidance. There were asked to consider whether attracting a different mix of ESRI demographic segments would make a difference and how help to attract/keep customers for desired Shorewood businesses.

The BLS spending categories selected were Food Away from Home, Entertainment & Recreation, Apparel & Services, Personal Care, Reading, and Home Furnishings/Equipment. These categories were chosen to represent commercial opportunities that were either strong in Shorewood like restaurants and personal care or generally missing and valued like books and home furnishings.

The results from the workshop exercise are as follows:

| ESRI Segment               | %    | Food Away from Home |            |            | Entertain/Recreation |               |            | Apparel & Services |            |            | Personal Care |            |            | Reading   |             |            | Home Furnish/Equip |               |            |
|----------------------------|------|---------------------|------------|------------|----------------------|---------------|------------|--------------------|------------|------------|---------------|------------|------------|-----------|-------------|------------|--------------------|---------------|------------|
|                            |      | Available           | Wkshp Ave  | %          | Available            | Wkshp         | %          | Available          | Wkshp      | %          | Available     | Wkshp      | %          | Available | Wkshp       | %          | Available          | Wkshp         | %          |
| Metropolitans              | 29.2 | 413                 | 200        | 48%        | 413                  | 130           | 31%        | 282                | 85         | 30%        | 107           | 75.5       | 71%        | 20        | 3.75        | 19%        | 248                | 37.5          | 15%        |
| Old & Newcomers            | 20.7 | 222                 | 205.5      | 93%        | 224                  | 23.5          | 10%        | 157                | 58         | 37%        | 56            | 32         | 57%        | 10        | 4.25        | 43%        | 129                | 32.25         | 25%        |
| Social Security Set        | 13.5 | 99                  | 63.5       | 64%        | 88                   | 47            | 53%        | 76                 | 19         | 25%        | 24            | 21         | 88%        | 5         | 2.25        | 45%        | 50                 | 20            | 40%        |
| In Style                   | 10.3 | 180                 | 97.5       | 54%        | 176                  | 37.5          | 21%        | 119                | 32.5       | 27%        | 44            | 22.25      | 51%        | 8         | 1.25        | 16%        | 104                | 21            | 20%        |
| Enterprising Professionals | 7.6  | 133                 | 71.25      | 54%        | 130                  | 47.5          | 37%        | 88                 | 20         | 23%        | 32            | 18         | 56%        | 6         | 0.25        | 4%         | 77                 | 24.25         | 31%        |
| Urban chic                 | 5.6  | 116                 | 73.75      | 64%        | 116                  | 40            | 34%        | 74                 | 32.25      | 44%        | 28            | 21.5       | 77%        | 5         | 2.5         | 50%        | 68                 | 11.25         | 17%        |
| Connoisseurs               | 5.1  | 175                 | 76.25      | 44%        | 171                  | 46.25         | 27%        | 111                | 53.75      | 48%        | 41            | 12.75      | 31%        | 7         | 0           | 0%         | 101                | 26.25         | 26%        |
| Suburban Splendor          | 4.4  | 151                 | 92.5       | 61%        | 147                  | 40            | 27%        | 96                 | 60.25      | 63%        | 35            | 26.25      | 75%        | 6         | 0.5         | 8%         | 87                 | 16.75         | 19%        |
| Sophisticated Squires      | 3.6  | 74                  | 54.75      | 74%        | 75                   | 20            | 27%        | 48                 | 11.25      | 23%        | 18            | 14.75      | 82%        | 3         | 0.75        | 25%        | 44                 | 2.5           | 6%         |
| <b>TOTAL</b>               |      | <b>1563</b>         | <b>935</b> | <b>60%</b> | <b>1540</b>          | <b>431.75</b> | <b>28%</b> | <b>1051</b>        | <b>372</b> | <b>35%</b> | <b>385</b>    | <b>244</b> | <b>63%</b> | <b>70</b> | <b>15.5</b> | <b>22%</b> | <b>908</b>         | <b>191.75</b> | <b>21%</b> |

The results of spending choices on Food Away from Home shows how the Metropolitan and Old & Newcomer segments, that are not members of the upscale or high society segments, may contribute heavily to the success of restaurants in Shorewood. Even the Social Security Set with the lowest amount of money to spend was estimated to contribute more than the Sophisticated Squires as shown in this table:

| ESRI Tapestry Segment      | % Pop. | Available<br>\$ to spend | Workshop<br>\$ designated | % of Available<br>\$ designated |
|----------------------------|--------|--------------------------|---------------------------|---------------------------------|
| Metropolitans              | 29.2   | 413                      | 200                       | <b>48%</b>                      |
| Old & Newcomers            | 20.7   | 222                      | 205.5                     | <b>93%</b>                      |
| Social Security Set        | 13.5   | 99                       | 63.5                      | <b>64%</b>                      |
| In Style                   | 10.3   | 180                      | 97.5                      | <b>54%</b>                      |
| Enterprising Professionals | 7.6    | 133                      | 71.25                     | <b>54%</b>                      |
| Urban chic                 | 5.6    | 116                      | 73.75                     | <b>64%</b>                      |
| Connoisseurs               | 5.1    | 175                      | 76.25                     | <b>44%</b>                      |
| Suburban Splendor          | 4.4    | 151                      | 92.5                      | <b>61%</b>                      |
| Sophisticated Squires      | 3.6    | 74                       | 54.75                     | <b>74%</b>                      |
| <b>TOTAL</b>               |        | <b>1,563</b>             | <b>935</b>                | <b>60%</b>                      |

As participants considered options for purchasing apparel and related services, books and magazines, and home furnishings/equipment, they discussed what retail options existed locally and whether consumer dollars would stay at home.

- Only 35% of available dollars for apparel was spent in Shorewood, lower than the ESRI Community Profile of 2013 Consumer Spending Potential Index.
- 21-22% of available dollars would be spent on reading and home furnishings/equipment.
- Almost 63% of available dollars were spent on personal care services, a reflection of the strength of this sector in Shorewood.
- Due to their greater number, Metropolitans were the greatest contributor to the category of entertainment/recreation while spending just 31% of their dollars in Shorewood; overall 28% of the total dollars stayed.

Details of table discussions were not recorded, but many participants were overheard expressing regret over the lack of bookstores in Shorewood (Harry W. Schwartz closed in 2009 and the Open Book Co-op in 2012). Discussions also included the reality of nearby regional retail mall shopping opportunities; it should be noted that ESRI information about spending preferences often included information about particular segments' preferences to shop specific chain stores available nearby.

Participants also understood that entertainment and recreation options also flourish near but not in Shorewood.

The second workshop activity focused on developing ideas for improving quality of life ratings in Shorewood. Grant introduced various quality of life indicators such as Rebecca Ryan's Handprint performance measurement categories: Vitality, Earning, Learning, Social Capital, After Hours, Cost of Lifestyle, and (Getting) Around Town. Grant combined common criteria used to rate cities from various national ratings of best places to live, such as in *Money Magazine*, *Businessweek* and *Kiplinger*, include job and/or income growth, cost of living, days of sunshine, education, air/water quality, health care costs, crime rates, daily commute time, auto cost, leisure amenities, work/life balance as essential markers of quality of life.

Participants were asked to consider quality of life criteria and to develop strategies to create a vibrant urban living experience that would make Shorewood the best place to live in the greater Milwaukee metro area. After brainstorming together and capturing the essentials on large sheets of paper, each group reported on the best unique ideas developed at their table. The ideas were then displayed for all workshop participants to select the best ideas by placing all/some of eight voting dots on the displayed papers.

The best group ideas then rated by participants are as follows:

| <b>Initiative</b>          | <b>Description</b>   | <b>Number of participant votes</b> |
|----------------------------|--|------------------------------------|
| Use empty/vacant spaces    | Utilize storefronts for advertising<br>Utilize vacant space for pocket parks<br>Find space for farmer markets, etc.  | 26                                 |
| Open up Wilson Corridor    | Narrow road and (create) green mixed use development & bike trails.<br>Connect with Estabrook (park) and its leisure/natural amenities   | 22                                 |
| Develop Communication Plan | Develop comprehensive and professional communication plan that incorporates & crosses all village entities and activities.<br>Get in front of issue, be pro-active and positive yet informative: <ul style="list-style-type: none"> <li>• Police/crime</li> <li>• Benefits of home improvements</li> </ul> | 19                                 |
| Develop Trolley Run        | Create circular route to connect Wilson Corridor and Hubbard Park; to Oakland/Capital; to Atwater Beach; to Kensington/Oakland Development; and back   | 17                                 |
| Cultivate Openness         | Recognize and incorporate diversity of population  | 13                                 |

|  |  |    |
|--|--|----|
| Improve Transportation Options                   | Promote alternate forms of transportation<br>Improve parking                     | 12 |
| Improve housing/buildings                        | Encourage energy improvements  | 12 |
|  | Encourage historic preservation and maintenance                                  | 11 |
| Improve relationships to neighboring communities | Create synergy with Shorewood as the hub reaching out to neighboring communities | 10 |
| Parks/open spaces                                | Make improvements  | 4  |

TRANSCRIPTION OF WORKSHOP TABLE NOTES

Table 1

JOBS:

Live & work places

Small businesses

Artistically

Wilson- narrow it - widen the park space to a viable development. Green space plus business/living

BENEFITS:

Social capital

Air/water quality

Crime rate

Leisure amenities

Starred: Trolley Run on the hour hits Wilson, Capital, Oakland, lake front - Kens & Oakland. Open up the Wilson corridor to have paths to soccer fields, dog park, beer garden, disc golf, Hubbard Park, and the lodges

Bike stations

Benefits parking

Table 2

Cost of living

Housing stock: living space (sacrifice 1000 sq. ft.)

Transport - bike <arrow up>: facility, education, change culture

Connectivity: street fronts are connected to ensure active built environment

Expanding restaurant options: food away from home : BRUNCH

Young families - youth - connectivity, open spaces, parks & recreation

Every demographic represented: seniors? Renter/duplex

Parking - all vehicles

Old/new tensions

Residential/commercial

(From torn corner: implement....Educate the .....consumer)

PR/COMMS

Managing change

Table 3

OPENNESS

Perception/reality

Block parties/village potluck

Block clean-up days (seniors)

High school reunions

Recognizing & encouraging diversity of population

Plein Air

Aesthetics:

Support the preservation of architectural diversity

Neighborhood grants

Maintaining properties

Mixed use new construction

Older apartments need upgrades

**Table 4**

[page 1]

VITALITY

Bike

Blemish

.....?

COST of LIFESTYLE

EDUCATION

Website

Collaboration

Perception of education

Message

Realtors

.....?

SAFETY

Woman

Police

Share - message.....?

[Page 2]

Police/ safety:

- Perception

- Education

- No niyac?

- Messaging

- women's safety

Vitality:

- Rid of blight

- No vacancies

- Energy at entrances

- Use of vacant space for vibrancy

- New businesses

Education:

- Perception

- Realtors as an advocate not naysayers

- Messaging, website, collaboration (parents with kids; get their support), Shorewood Today (better coverage)

- Urban myth vs reality

**Table 5**

VIBRANT URBAN LIVING PRIORITIES

1. Housing stock: condition, energy efficiency, improvements
2. Relationship to neighboring communities - synergy: Play off offerings of others: downtown, lakefront, etc., 3rd ward, Walker's Point
3. Openness/welcoming: Keep diversity, progressive balance
4. Learning community: Come together to support culture, education

Village Supplement #1: Resident Move Survey, November 2013

Village Supplement #2: Village-wide Survey Results 2013

Village Supplement #3: 2015 Vision Plan Summary

Village Supplement #4: ESRI Tapestry Segmentation Area Profile and Shorewood Segment Descriptions

## **Appendix VII**

### **Village of Shorewood Vision 2025 Plan Presentation**



## Community Visioning Workshop

November 9, 2013



# Community Visioning Workshop Welcome!

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## Shorewood Vision Projects

- 2005: Vision for 2015
- 2009 Update
- 2013-14 Vision for 2025



# Vision Statement- 1

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A vibrant urban community with safe, friendly neighborhoods offering a range of well-maintained housing options which reflect Shorewood's architectural heritage.



## Vision Statement - 2

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Shorewood will be a desirable community that continues to attract and retain residents who value Shorewood's community assets and rich diversity.



## Vision Statement - 3

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A model community that welcomes broad citizen participation in civic decision-making and is governed with a long-range, disciplined view of the future of Shorewood.



## Vision Statement - 4

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An attractive community with strong property values and a competitive tax rate; well-maintained public infrastructure; quality, cost-effective, and valued Village services; and outstanding staff members who use collaboration, innovation, and technology to optimize productivity and service excellence.



## Vision Statements – 5 & 6

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- An ecologically-responsible community with a commitment to protecting the environment.
- A thriving community with a mix of attractive stores and services in a robust and profitable commercial center.



## Vision Statement – 7

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A well-educated community in which public and other educational assets are cultivated in a spirit of collaboration to achieve excellence.



# Implementation Plan Goals

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- Promote vibrant urban housing
- Protect & enhance property values
- Deliver quality services at a competitive tax rate
- Maintain a safe, walkable, small-town urban living experience
- Remain committed to open, interactive communication
- Protect & enhance our environment
- Protect & enhance public green spaces
- Collaborate to promote educational excellence



# Marketing Vision Statement

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Shorewood is generally understood to be the most desirable area in Metro Milwaukee in which to live, raise a family, and locate a business.

# Are we “There” yet?

What does the data say?

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# We have new neighbors.

(Percent of Householders, 2010 Census)

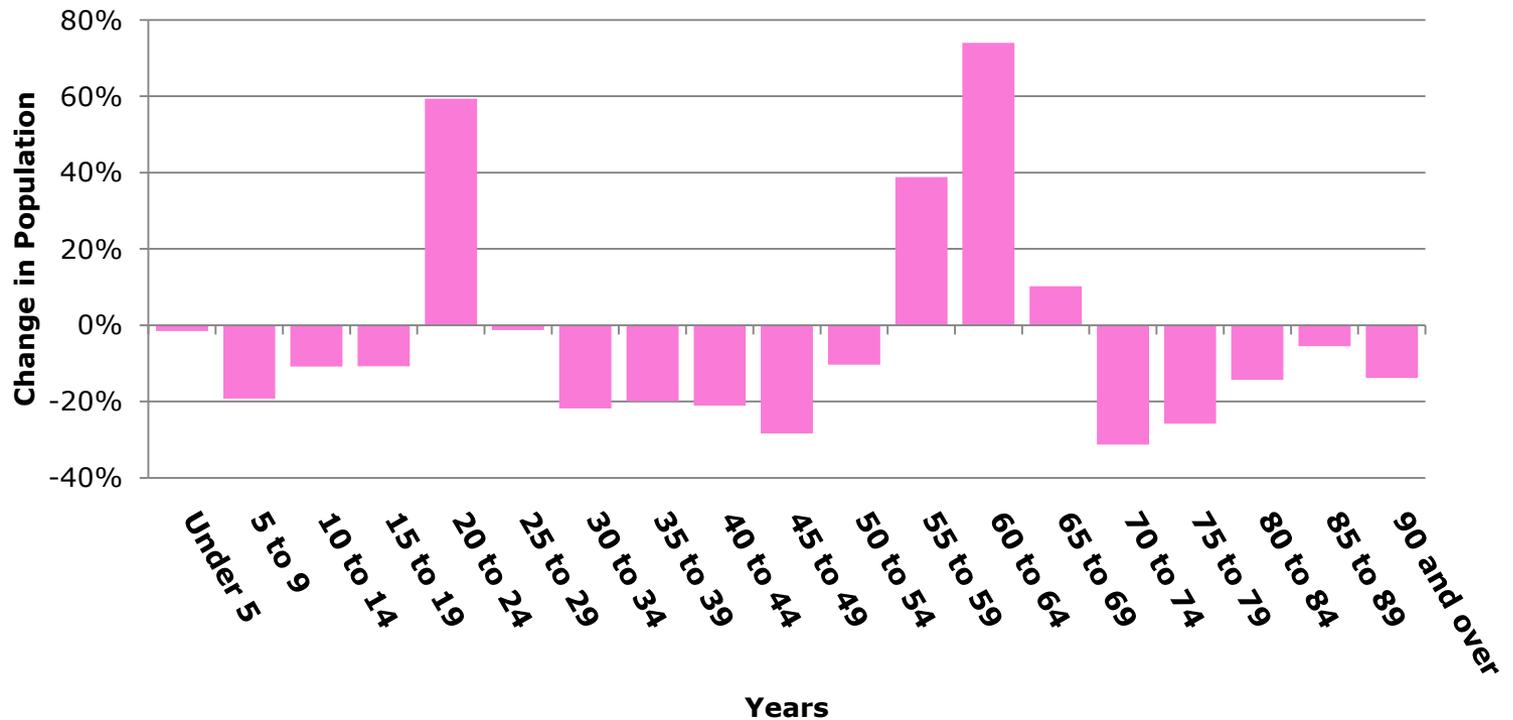
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- 2000's: 65.3%
- 1990's: 18.5%
- 1980's: 9.0%
- 1970's: 3.8%
- <1970: 3.4%

# The Population Has Changed Some

## Percent Population Change 2000 to 2010 Shorewood



# Not much change in households

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## 2000 Census

- 49% of HH are NOT families
- 25% of family HH have children <18
- 40% live alone
- 52% are renters

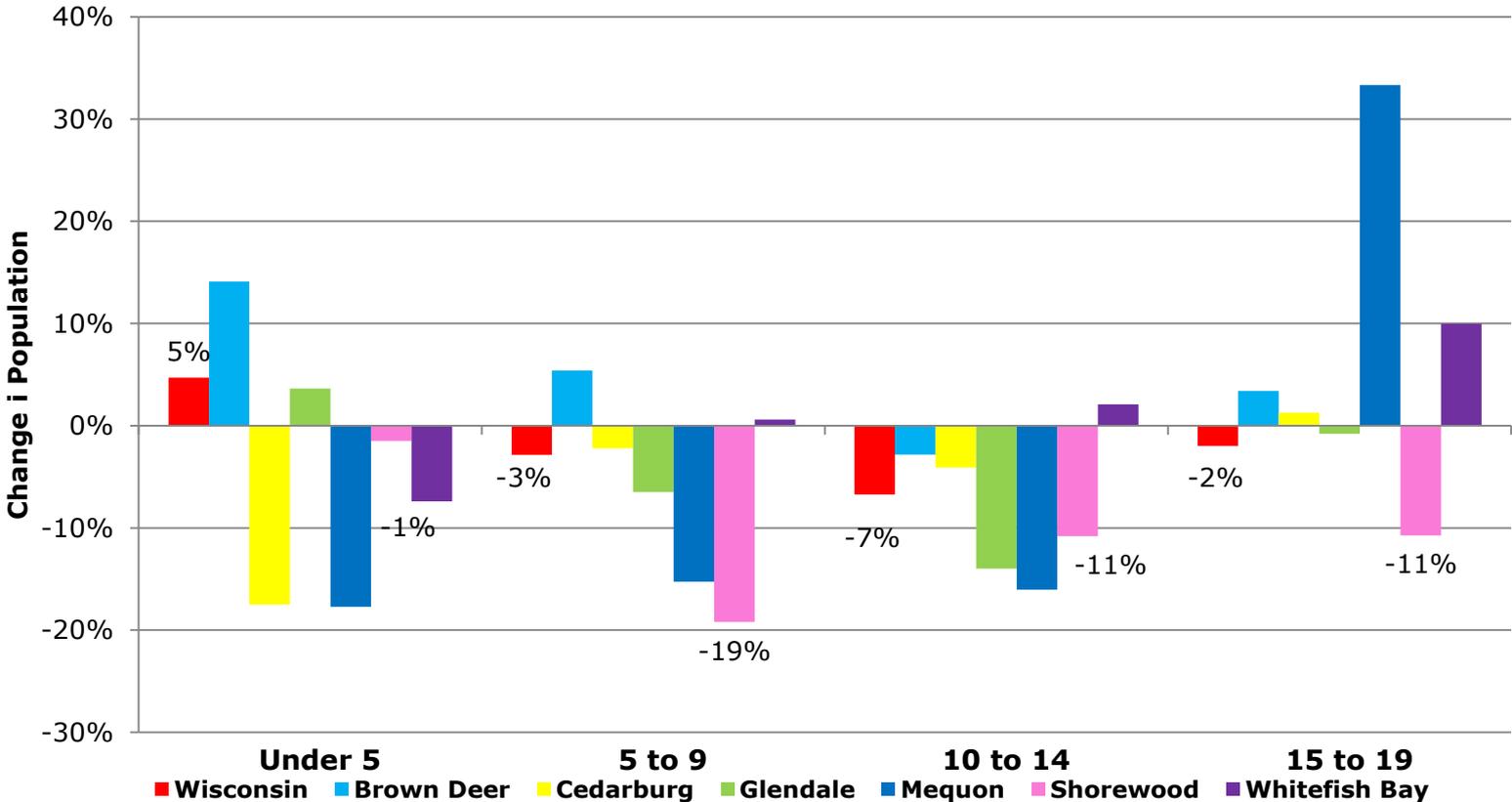
## 2010 Census

- 51.3% of HH are NOT families
- 22.6% of family HH have children <18
- 39% live alone
- 53% are renters

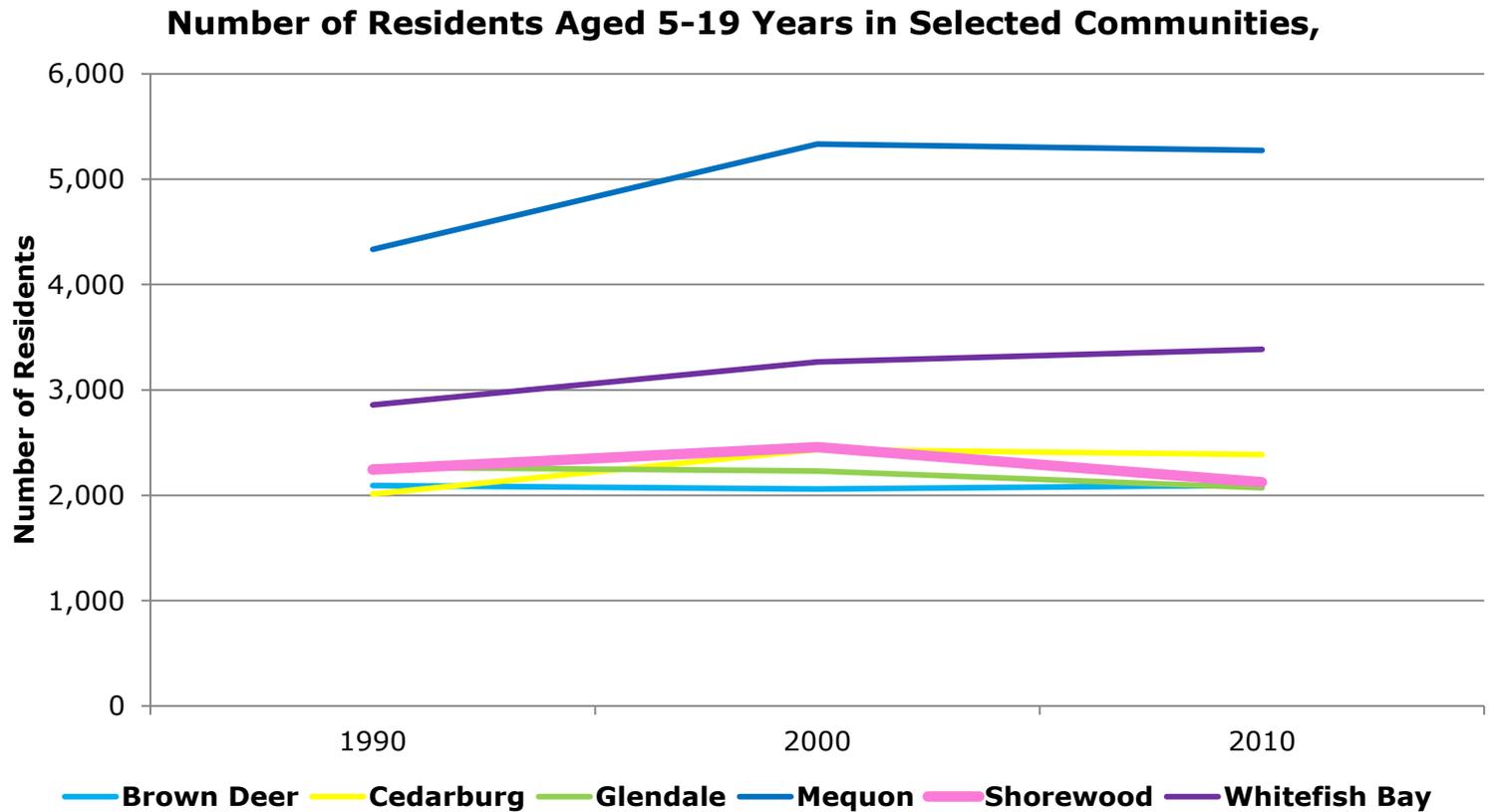
# Change our Children

% Change 2000 to 2010

## COMPARABLES: Ages 0-19 years

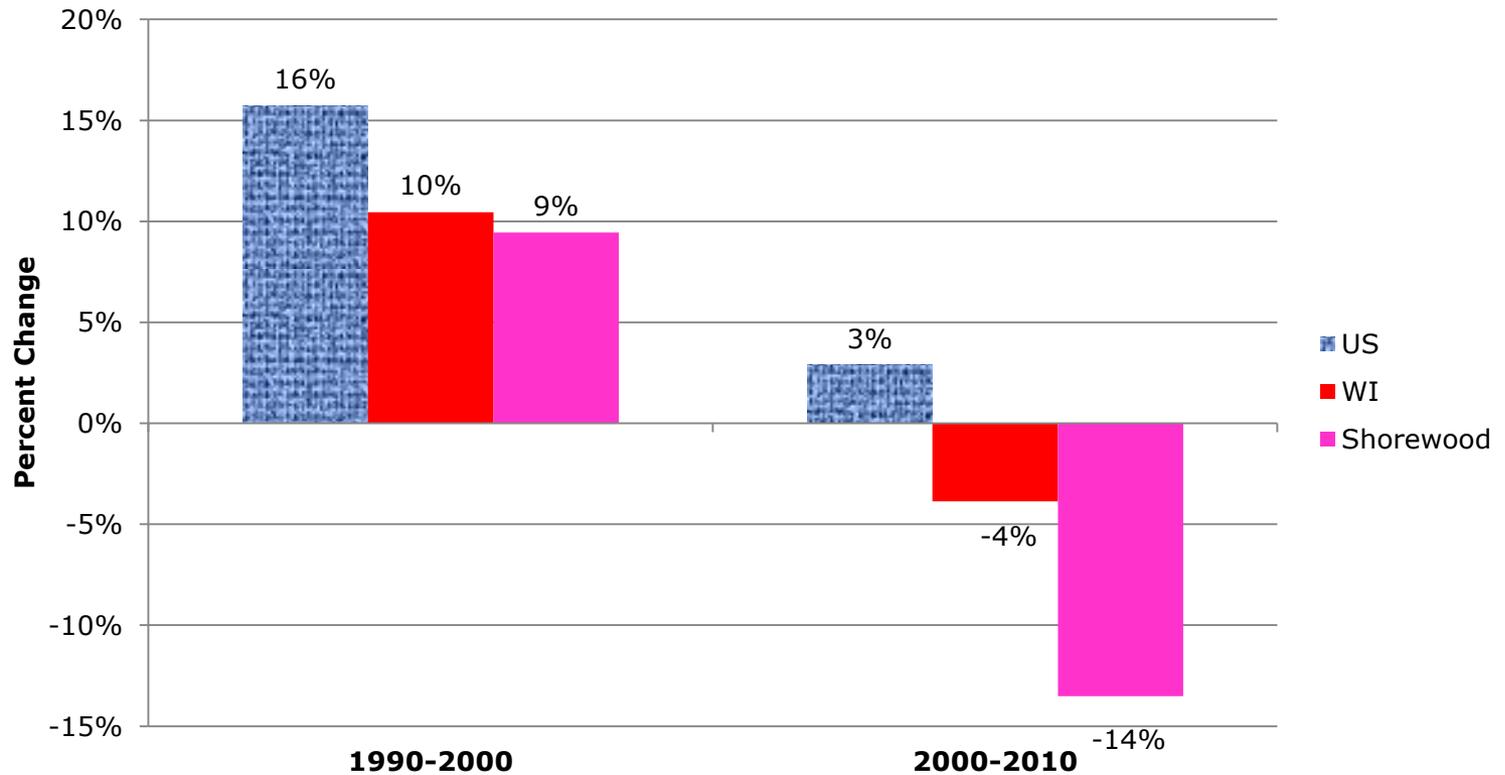


# School Age 1990 to 2010



# School age: US, WI, & Shorewood

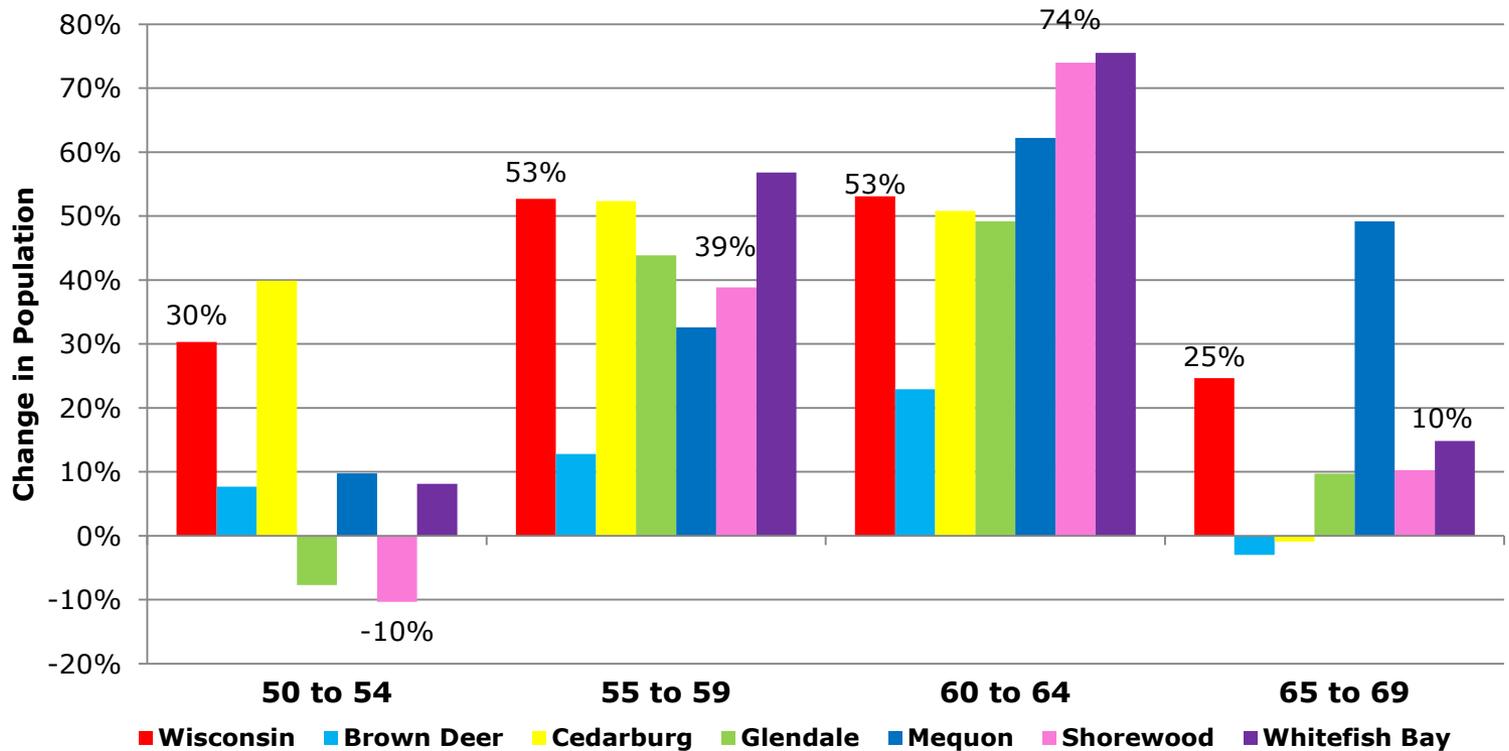
**Percent Change in Population for Residents Aged 5-19 Years  
1990-2000 and 2000-2010**



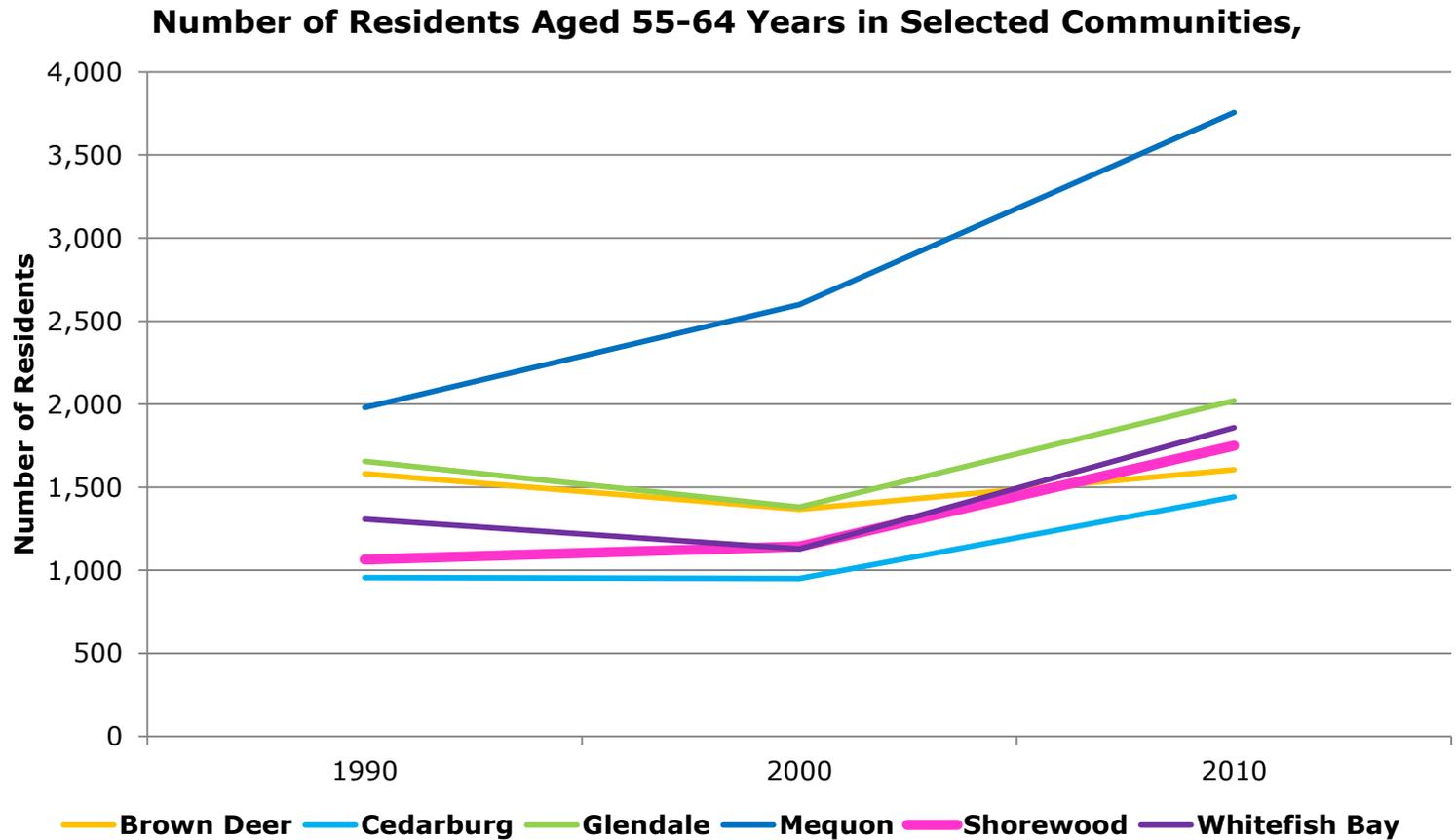
# Change in Adults

## % Change 2000 to 2010

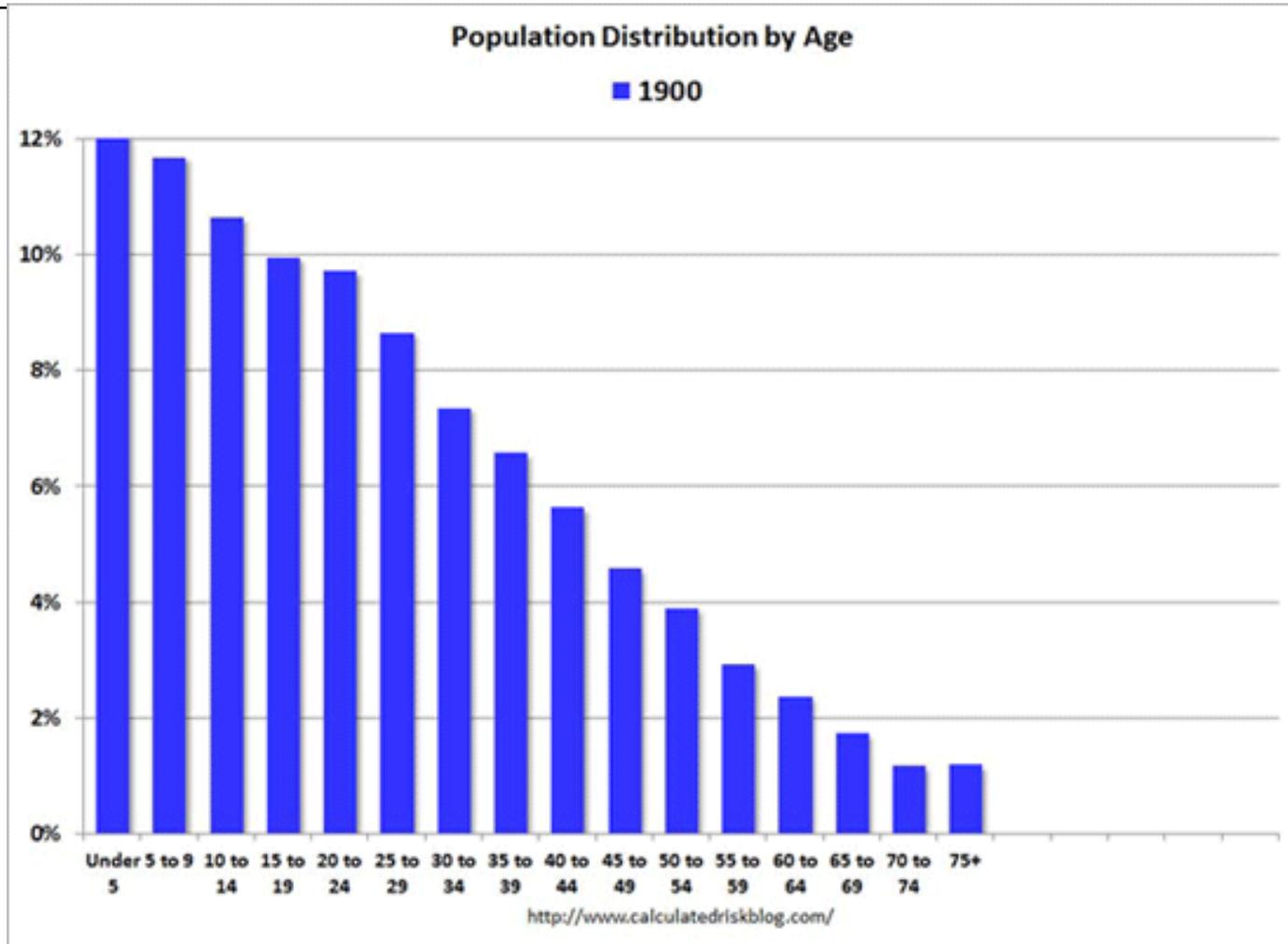
### COMPARABLES: Ages 50-69 years



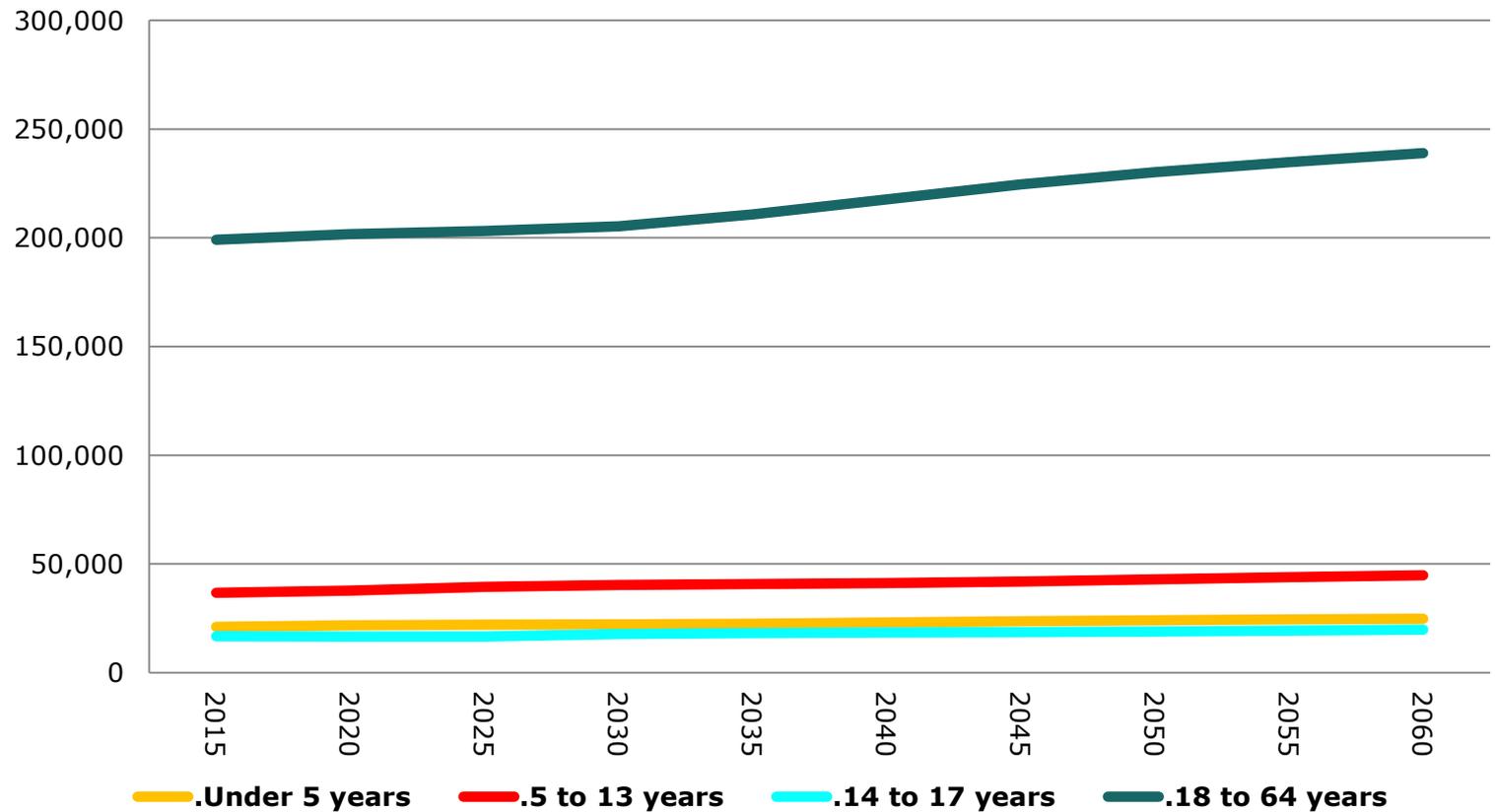
# Ages 55-64 1990 to 2010



# US Historical Context



# US Projection: 2015-2060



# Who Will Be Living in Shorewood?

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- National trends
- Wisconsin “stickiness”
- Milwaukee MSA

# Will They Choose to Rent or Own?

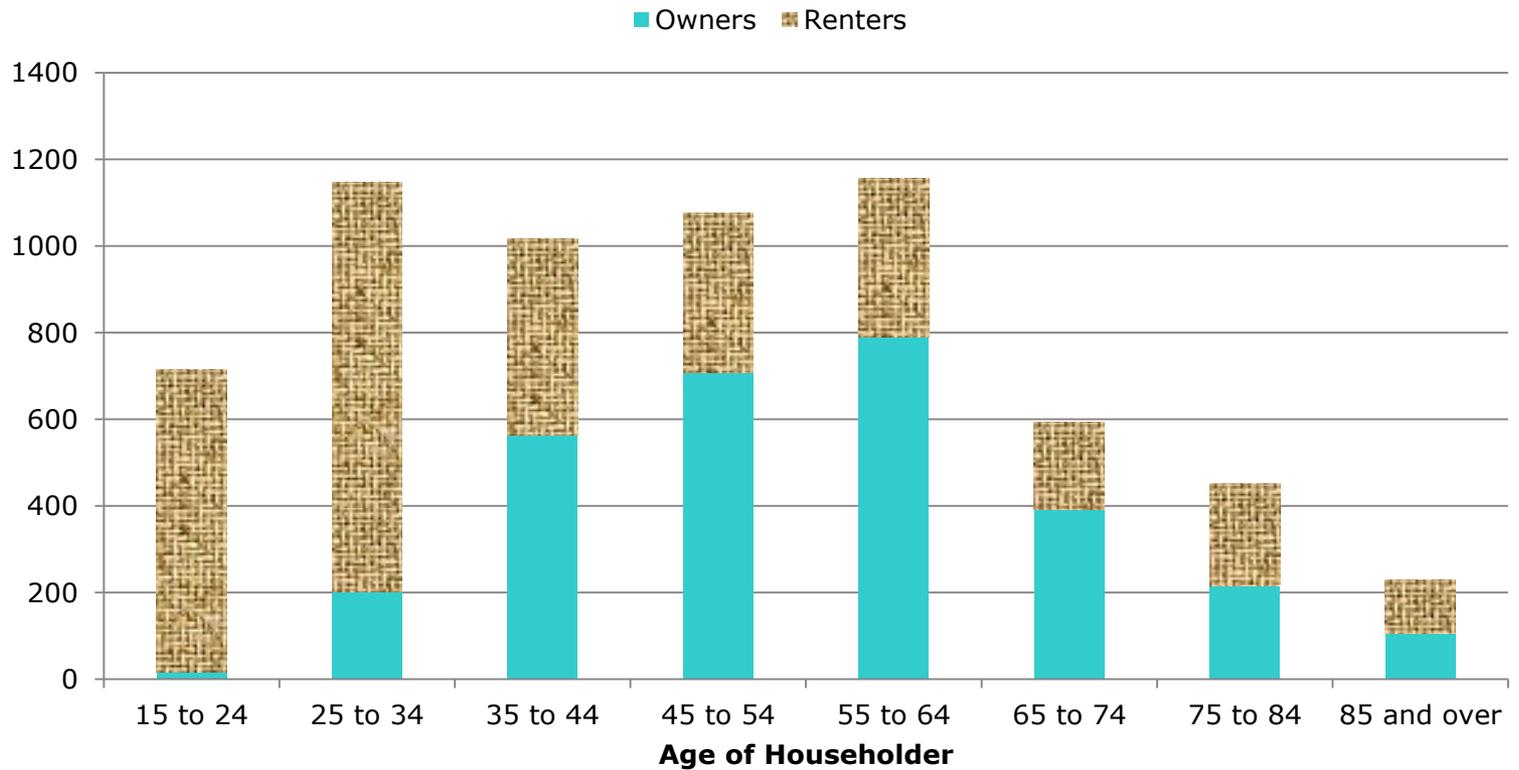
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- Renters
  - Many ages/  
stages
- Owners
  - 1<sup>st</sup> time home  
buyer: 30-32
  - 2<sup>nd</sup> time home  
buyer: 42

# Renters and Owners – 2010

## By Age of Householder



# Architectural Heritage (Typical from NAHB)

---

## **Typical New - 1900**

- 700-1,200 SF
- 2-3 bedrooms
- 0-1 bathroom
- Two stories

3,642 homes built in  
Shorewood <1940

## **Typical New - 1950**

- 1,000 SF or less
- 2 bedrooms
- 1 bathroom
- One story

815 homes built in  
Shorewood during  
1950's

# Typical New Home - 2000 (from NAHB)

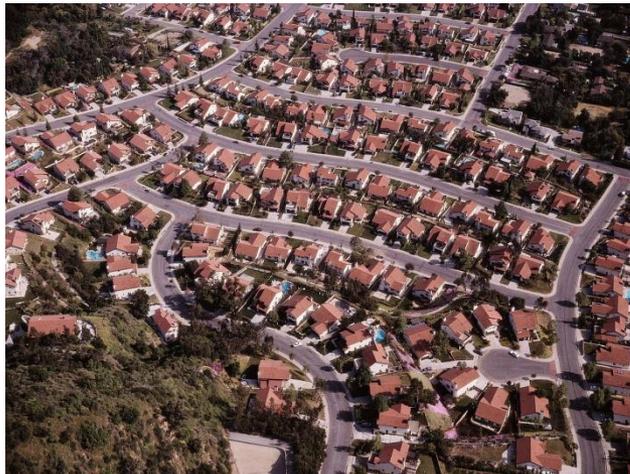
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- 2,265 SF
  - 3 or more bedrooms
  - 2 ½ bathrooms
  - Garage for 2+ cars
  - Center A/C
  - 1 Fireplace
  - Two stories
- 146 new in Shorewood



# Typical New in 2012 (from NAHB)

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- 2,226 SF (median)
  - 2,494 for 35 and under
  - 2,065 for 65 and older
  - 2,150 SF (Midwest suburb)
- 3 bedrooms/2.5 baths
- Dining room
- 3 add'l rooms (9.5 total)
- Garage & A/C
- Shopping w/in 15 min.

# Typical in Shorewood (of 6,619)

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- Units with 9+ rooms: 789
- Median # rooms: 5.3
- 3,695 w/ 1-2 BR
- 2,438 w/ 3-4 BR
- 301 w/ 5+ BR

# Typical in Shorewood (of 6,619)

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- 2,555 units are SF detached (39%)
- 1,880 are in 20+ unit buildings (28%)
- 1,119 are two units attached (17%)

# Is our “There” still reasonable?

What does the data say?

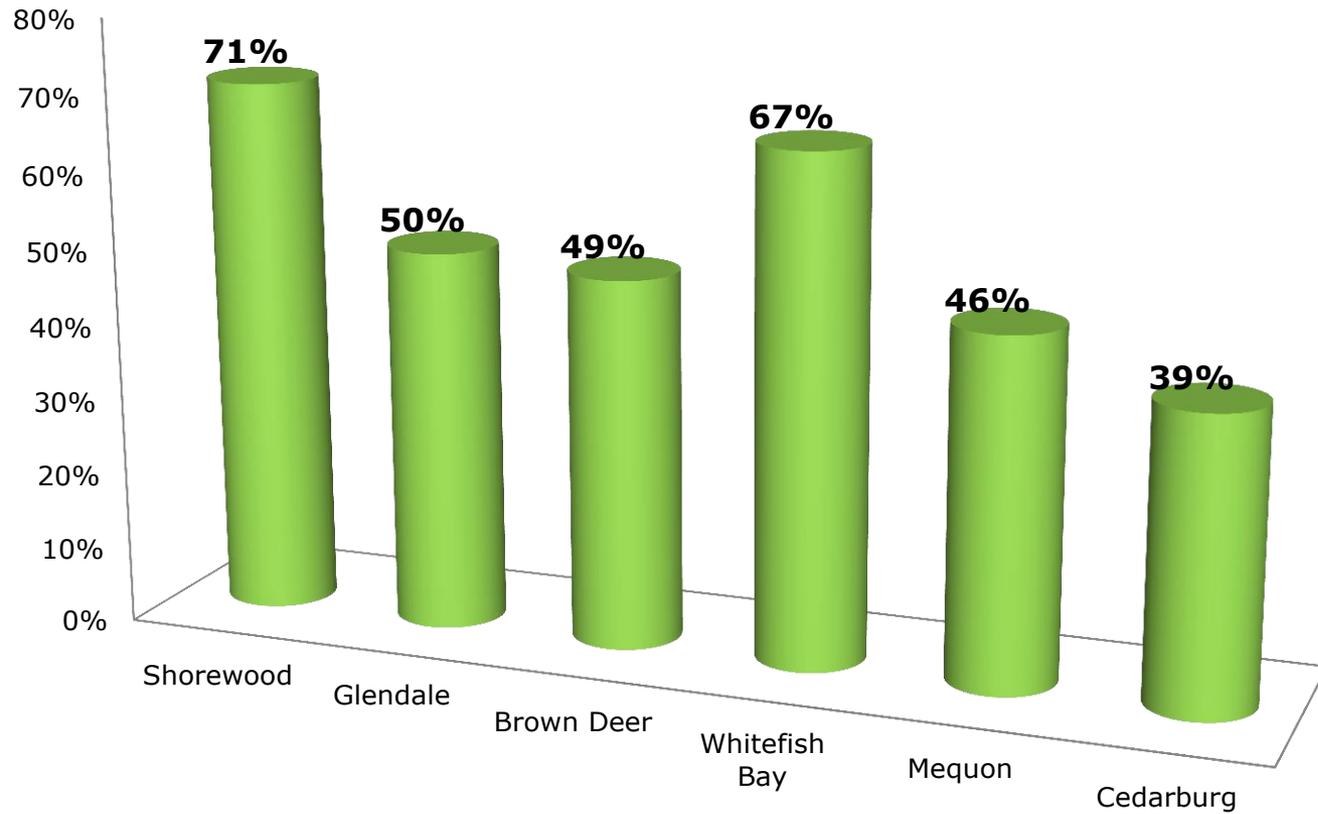
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- Vibrant urban housing
- Protect/enhance property values
- Attract families with children

# Home Value Strengthening % Change 2000-10

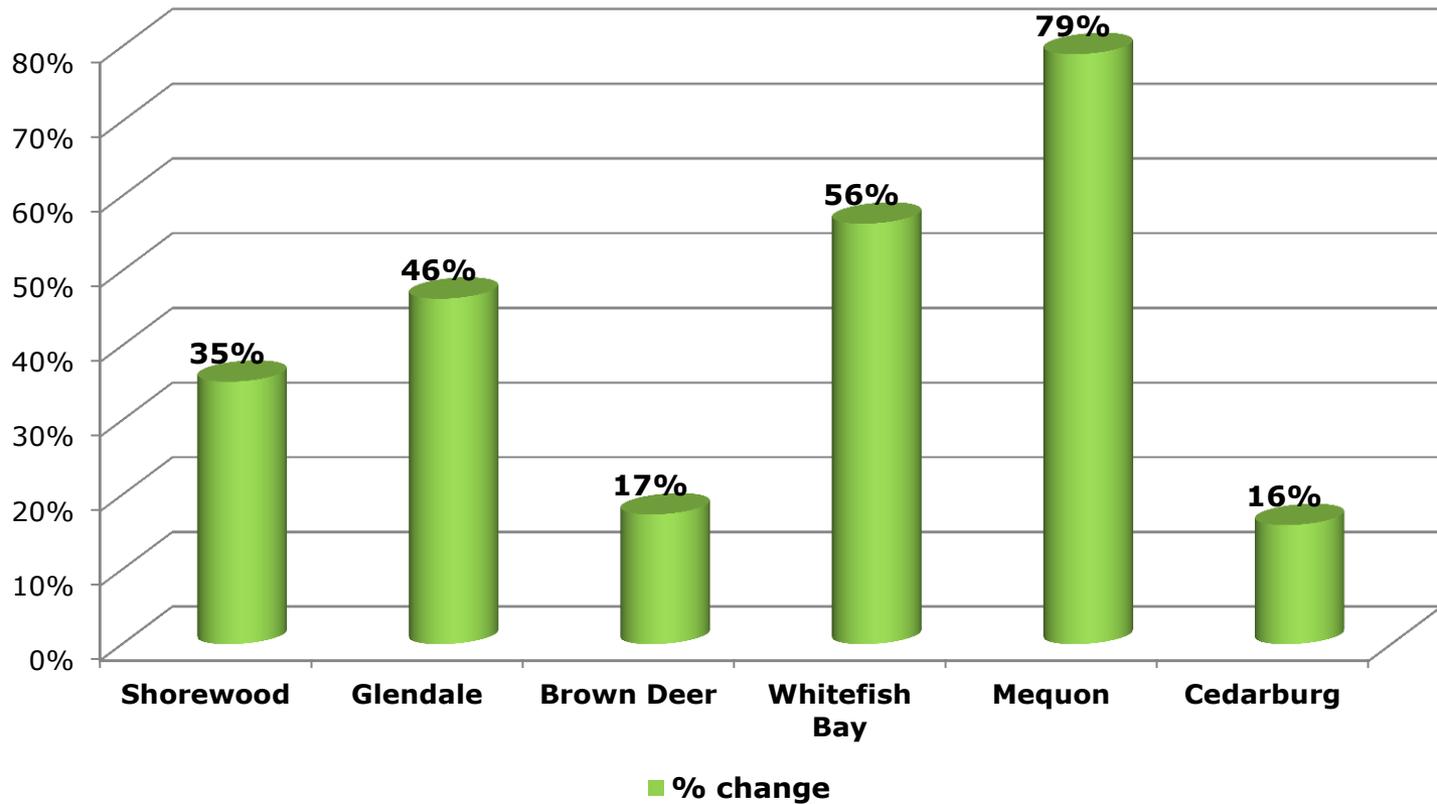
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# Median Rent Strengthening Some

## % Change 2000-10

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# 2013 Entrance/Exit Survey

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- 57% rent then buy
- From MKE, out of state
- Considered Mke, Tosa, Whitefish Bay
- ☺ Jobs & schools
- ☹ Taxes, COL, parking

# Who we are attracting? Why?

## ESRI Tapestry Segmentation

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## **Gazing into the future**

What should our tapestry segments look like in 2023?  
How can we become more desirable to priority groups?  
How do we move from “Good” and “Great” to BEST?

# 2013 Community Survey

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- Taxes up to rate of inflation
- Parking ease
  - Home: 3.4
  - Night: 3.1
  - Business: 2.6
- Support sewer improvements

# Knight Soul of the Community 2010

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Why People Love Where They Live and Why It Matters: A National Perspective

“Over the past three years, the Soul of the Community study has found a positive correlation between community attachment and local GDP growth.”

*(Knight Soul of the Community, 2010)*



# “Best Place to Live”

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Jobs

Cost of living

Sunshine

Education

Air/water quality

Healthcare costs

Crime rate

Daily commute time

Auto costs

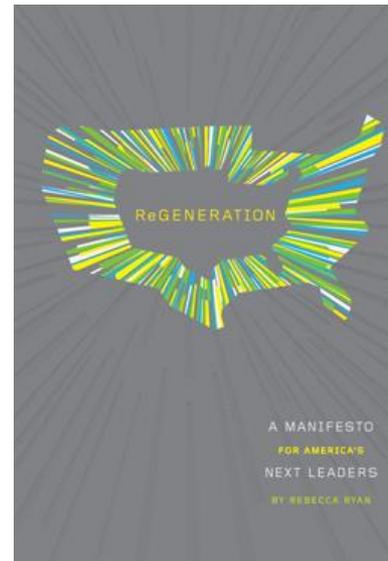
Leisure amenities

*Sperling Indices*

# Measures of Strength/Desirability by Rebecca Ryan

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- Vitality
- Earning
- Learning
- Social Capital
- After Hours
- Cost of Lifestyle
- Around Town



Softcover  
147 pages  
ISBN 0-91131-20251-7  
Price \$19.99  
Usually ships in 2 Business days

## Knight Soul of the Community 2010

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“...the same items rise to the top, year after year:

- Social Offerings — Places for people to meet each other and the feeling that people in the community care about each other
- Openness — How welcoming the community is to different types of people, including families with young children, minorities, and talented college graduates
- Aesthetics — The physical beauty of the community including the availability of parks and green spaces”

*(Knight, 2010)*

<http://www.soulofthecommunity.org/sites/default/files/OVERALL.pdf>

# Best Place to Live?

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What can we do?

What should we do?

**What must we do?**

- Personal sphere
- Government sphere

Let's get started!





# Best Place to Live: Vibrant Urban Living Ideas/Priorities

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- Vitality
  - Earning
  - Learning
  - Social Capital
  - After Hours
  - Cost of Lifestyle
  - (Getting) Around Town
  
  - Social Offerings
  - Openness
  - Aesthetics
- Jobs
  - Cost of living
  - Sunshine
  - Education
  - Air/water quality
  - Healthcare costs
  - Crime rate
  - Daily commute time
  - Auto costs
  - Leisure amenities
  
  - **Challenges: Sewers, parking, taxes/fees, alleys....**