Executive Summary: Shorewood Visioning Update

“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 completed a village-wide visioning project. In 2009, the Board reviewed the Vision Statement and revisited the Implementation Plan thru a condensed process facilitated by Barbara Grant of Public Management Partners. Grant facilitated four focus groups and one open-invitation community workshop to search for trends or issues that might not yet be observable and could affect the Vision Statement and Implementation Plan. The Village Board, Manager, and department heads then met with Grant to consider the Vision Statement, review implementation plan objectives, and select plan priorities.

1. Where are we now? Until completion and publication of 2010 census data, detailed trend data is not readily available to update the 2005 study. Shorewood is still a fully developed, primarily residential landlocked village 1.6 square miles in size with aging public infrastructure and 75% of its housing stock built on or before 1939.

Selected 1990 and 2000 census data from six comparable communities [Brown Deer, Cedarburg, Glendale, Mequon, Wauwatosa, and Whitefish Bay] and Wisconsin is still noteworthy:

- Shorewood is younger than comparable communities are.
- Nearly 23% of Shorewood residents are aged 55 and older, a national percentage not expected until 2030; however, Shorewood has a lower percentage of residents aged 65 and over (14.5%).
- Many of Shorewood households are non-family (49%) and have householders living alone (40%) than in comparable communities and Wisconsin.
- 25% of Shorewood family households have children under the age of 18. This percent is similar to selected comparable communities except Cedarburg (35%) and Whitefish Bay (40%) and is slightly higher than Wisconsin’s (24%).
- Except as compared to Whitefish Bay, Shorewood is more educated than its comparables (63% with college degrees or higher; 95% high school graduates).
- A majority of Shorewood residents are renters (52%) and rent payments are lower ($626) than in comparable communities. Contrary to the community perception, most renter-occupied units are not duplexes.

Participants reviewed information gathered from the 2008 community survey that 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. The results show that:
- Most residents are satisfied with present Village services and home maintenance.
- Strong majorities are positive or very positive about Village initiatives designed to enhance the community including pedestrian safety enhancements, park improvements, and central business district redevelopment/façade improvements. A majority approved of new public plazas, marketing, the redesign of the Capitol Drive Bridge, and streetscaping initiatives.
- When asked in the survey about alternative funding options such as user fees/charges, the community split in approximately thirds: 1/3 preferred increasing user fees/charges rather than increase property taxes, 1/3 preferred increasing property taxes, and 1/3 preferred a combination of increased user fees and taxes. Less than 1% felt that reducing property taxes required the most attention.
- When asked about using special assessments to fund alley resurfacing projects, over ½ were willing to consider special assessments alone or in conjunction with property taxes; percentages differed depending on whether respondents had alleys.

In the focus groups and the community workshop, most participants found the recent closing of the Harry W. Schwarz bookstore distressing. Many expressed that Schwarz’s closing was not only a loss of a quality national chain store that reflected the community’s love of learning, but it also was a loss of a valued social gathering place. Many feared that the closing reflects a weakness in Shorewood’s retail sector beyond the country’s current economic problems.

2. Where are we going? The following trends are still noteworthy.

- Shorewood’s population has steadily decreased from its peak of 16,199 in 1950 to a population of 13,763 in the 2000 census; the rate of decreasing population has slowed since the 1980 census of 14,327. Wisconsin’s and the United States’ populations have grown.
- Between 1990 and 2000, Shorewood’s population has declined in all categories except those aged 5-19 (9% growth) and those aged 45-64 (36% growth). This pattern is different from comparable communities.
- Although perceived as an aging community, the 14.5% of Shorewood residents 65 and older decreased by 20% in the last decade, a trend shared only by Whitefish Bay and opposite to comparable communities’ increasing percentages.
- Although its public school enrollment has not decreased dramatically due to the acceptance of students from outside of Shorewood, Shorewood’s public schools continue to have fewer students than in previous years. Students continue to perform well on state tests; comparable communities are competitive.

Participants spent a fair amount of time discussing the population trends, trying to align the unexpected with their assumptions about Shorewood. One assumption is that Shorewood is primarily a family-oriented community attractive to families with children. Another is that Shorewood is an increasingly aged community with...
residents aging in place. A third is that Shorewood is attracting an increasing number of UWM students to apartments and duplexes.

Many participants view the recent closing of the Harry W. Schwarz bookstore as a sign of continued or increasing fragility in the Village’s retail sector. Anecdotally, some in focus groups felt that their neighborhoods or condominiums were “flipping” to younger residents who have families or are university students living in parent-owned condominiums.

3. Where do we want to go? Shorewood’s Vision Statement identifies the community’s desire to maintain its quality urban lifestyle that is less “big city” and more “small, neighborly village.” Residents still appreciate being near enough to Milwaukee to easily enjoy its amenities while still being able to walk through safe neighborhoods filled with friendly faces, green trees, and well-kept yards. They like to shop at neighborhood stores and eat at Village restaurants. Most residents value Village services and public facilities and want to see public infrastructure well maintained. They value education and remain committed to a strong public education system.

In 2008, Shorewood commissioned a marketing study of the demographics of Shorewood and its retail/commercial competitors and developed a branding statement: “At the edge of the city and the heart of everything.” Leaders discussed the marketing concept of what it meant to “be the right things to the right people, rather than all things to all people,” in light of the demographic changes seen or reported in the Village.

The 2005 Vision Statement has stood the test of time and remained unchanged:

**In 2015, Shorewood will be:**

- A vibrant urban community with safe, friendly neighborhoods offering a range of well-maintained housing options which reflect Shorewood’s architectural heritage.
- A desirable community that continues to attract and retain residents who value Shorewood’s community assets and rich diversity.
- 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.
- 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.
- 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.
- A well-educated community in which public and other educational assets are cultivated in a spirit of collaboration to achieve excellence.

August 29, 2005
4. **How do we get there?** The Implementation Plan focuses on protecting and enhancing property values. Strategies that could help the Village meet this priority objective include the following:

- Encouraging homeowners to invest in improving their property.
- Implementing more aggressive and larger-scale redevelopment projects.
- Protecting and enhancing public green spaces.
- Delivering quality services.
Community Participation: Focus Groups Summary

Facilitator Barbara Grant met with 25 citizens who served the Village on a variety of committees and commissions. Grant reported participants’ viewpoints and incorporated information gathered into subsequent discussions.

Vision Statement

Participants felt that there were few controversial items in the Vision Statement. Many felt that specific assets such as Lake Michigan, the Milwaukee River, accessibility to Milwaukee, quality schools, and the Shorewood library were important and felt they needed to be listed specifically. Some asked about the meaning of “diversity,” and there was general ambivalence expressed about economic diversity.

Several focus group members expressed a strong interest in making environmental sustainability the highest priority. Not only is “going green” a national marketing trend, but Shorewood is well-situated to attract those who want the sustainability and vibrancy of urban living without many of the urban liabilities.

The “competitive tax rate” statement raised emotional responses in several groups. Some asked whether it was true, some whether it was a valid goal, and others that leaders continued to fall short in prioritizing lower taxes/tax rates.

The “friendliness” factor was considered an important quality of life issue by many. Some expressed concern that the word “community” was repeatedly used, but that community pride/sense of community was not. One newer community activist cautioned that friendly but busy current residents “had full dance cards” that distracted them from forming friendships with newcomers. Many homeowners expressed that single-family property owners were the backbone of the community and “made things happen. The unstated implication, seen also in 2005, is that renters are transients, and their lack of financial stake in property diminishes their commitment to making Shorewood a better place to live.

“What is” knowledge

Retail and Commerce: There was widespread concern that commerce may be healthy but not “robust.” As in 2005, retail opportunities were not as diverse as many would prefer. Participants recognized the difficulties in the current economic downturn as well as the market limitations faced by chain and “mom-and-pop” stores alike. Some participants differentiated between retail and general commerce, a useful segregation of categories. Despite the amount of work done by the Community Development Authority, the BID, and the Village regarding Shorewood branding, there was little knowledge or awareness of market niche concepts or analyses.

Participants raised several additional ideas:

1. There are limits to the amount of success that can be expected with multiple small “vignette” developments rather than a serious redevelopment that could be undertaken if the Village were to focus on a twenty year planning horizon.

2. Market forces determine many things; government control is limited.

3. Lack of a parking structure and limited surface parking is a limitation.
4. Someone needs to remove snow by sidewalk at curb to ease winter access.
5. Buildings are often in disrepair at the parking lot level.
6. Need for more UWM connections besides housing for students.

**Housing:** Many seemed unaware of and a bit troubled by the percentage of renters because their impression had been that Shorewood was a village of single-family homes with children and families. This is similar to housing discussion in 2005. There is still ambivalence and stereotyped assumptions regarding renters:

1. Single family homeowners are a/the driving force in the community
2. Renters are not involved in the community
3. Most renters are students in duplexes
4. Many other renters are elderly, poor women in one-bedroom apartments

There was some ambivalence about housing affordability. Duplexes might make housing affordable to renter and owner occupants alike, but renters are considered generally less desirable. There were concerns expressed that Village grant funds given to convert duplexes to single-family homes would decrease affordable housing options for young families who might be desirable renters. Most were concerned that too many affordable housing units for students would bring noise and nuisance activities as well as a presumed lack of commitment to continuous improvement in Shorewood’s housing stock.

Most participants were surprised by the high percentage of single person householders. Some argued that high density is ecologically efficient and “sellable” in the present and future market of high automobile costs and a geriatric population bubble. The trend information about active retirees was new and generated a shift in discussions away from just families and students. Some expressed the desirability of embracing all renters, but particularly new residents who were active retirees rather than parents with young children.

As in 2005, a majority of participants in surveys, focus groups, and workshops felt that single-family and duplex housing stock was generally well maintained on the outside. Concerns were again expressed about both demanding and relaxing building code enforcement inside properties and about the persistent belief that property owners’ taking out permits causes higher taxes to be due on their property.

**Good schools:** Strong public schools are still valued and most residents are proud of Shorewood’s strong public school heritage. Educational attainment is valued and expected in Shorewood, but this does not keep residents from feeling ambivalent about bused students and wanting enough “Shorewood kids” to fill the schools.

**Infrastructure:** There was broad concern about road surface conditions and some interest in greater investment in infrastructure maintenance over other “glitzier” projects. There was a general willingness to pay to maintain/improve infrastructure. Stormwater control was specifically raised as an issue worthy of tax dollar investment as was ecological sustainability. Some saw the need to fund light rail and street car loops as important public infrastructure supporting high quality of life as well as environmental sustainability.

**Social structure:** Racial and international diversity was widely lauded. The library, fitness center, football field, and community groups were specifically cited as important social interaction infrastructures. Schwarz bookstore had a significant social gathering element that many feel the need to replace. Many reflected that it was difficult to integrate newcomers into a community with “deep roots” and “full dance cards.” Some felt that the loss of the Shorewood Herald and the movement to web-based news reduces community cohesion.
**Taxes**: Taxes elicited strong feelings that striving for a “competitive tax rate” wrong-headed and naïve as well as strong feelings that taxes were too high. Most assume that taxes do/should/have to pay for all Village services/infrastructure. However, discussions about alternatives in the workshop indicate that diversifying funding sources might be palatable or even preferred. Survey information indicates a need for a strong public education to get beyond automatic responses to taxes and alternative funding sources.

**Trend information**

Focus group participants shared the following impressions that may indicate trends that will affect the future of Shorewood.

1. Anecdotal story of one condominium “flip” of 30-40% from retirees to:
   - Families with babies
   - Students living in parent-owned units
2. Anecdotal story of one neighborhood seeming to transition from retirees to families
3. Impression that empty nesters are moving to condos in downtown Milwaukee
4. Belief heard in 2005 that some residents are “trading up” from smaller/lower value home to larger/higher value home within Shorewood
5. New “Connect Caring Communities” effort will support elderly so that they can live in Shorewood for additional years

**Community Participation: Workshop Summary**

20 residents and 6 elected officials participated in the open invitation community workshop held on the morning of April 4th. Facilitator Grant asked residents to spread out among the tables and asked participating officials to join them, meeting new people where possible.

After an introduction to the community visioning process and Shorewood’s Vision Statement, Grant reviewed key facts about Shorewood’s present state as well as available trend data reviewed elsewhere in this final project report.

She introduced the marketing concept that if Shorewood has intrinsic value, it is important to focus on being the right things to the right people but not all things to all people. Grant asked participants to think about how to maintain a high quality urban living experience with a “small town” feel.

She reviewed the Village priorities to date: promoting delivery of efficient and effective Village services, maintaining a variety of housing options to meet the needs of all ages and stages of life, retaining and attracting residents with similar values, maximizing assessed real estate values, controlling taxes and spending, communicating well, and promoting environmental awareness and activities.

After facilitating a preliminary discussion about setting action priorities while limiting tax levy growth, she asked participants to focus on strategies to achieve the Village’s vision of the future that included alternative financing alternatives. Volunteers at each table recorded participants’ thoughts and presented them to the workshop group as a whole. The following statements reflect key ideas from the group reports. [Attachment B: Transcribed Reports.]

- **Increase the tax base.** There was interest in leveraging the present successes of
Walgreens, Pick ‘n Save, and Culvers, reportedly the highest grossing ones in the state. Participants want a variety of healthy businesses that add to the quality of their lives while generating tax revenue. They want to market Shorewood as a good place to do business and further develop the business corridor. Participants suggested addressing housing issues as follows: Upgrade apartments. Convert duplexes to single-family residences. Promote and support block groups that connect residents. Protect and enhance housing stock through home loan program and code compliance.

- **Diversify revenue options.** Although a wheel tax would require public education, this option piqued broad interest among workshop participants as a means of maintaining streets.

- **Attract valuable residents.** Participants suggested shifting the paradigm from “upscale” to educated and forward thinking. Shorewood has good schools that could serve a community function beyond educating children. Arts and wellness programs and facilities could be used to promote the desirability of Shorewood to active residents. UW-Milwaukee’s (UWM) urban planning and water institute should produce jobs and innovative partnerships that would attract/retain desirable residents in Shorewood if it could find ways to be a magnet for UWM employees.

- **Highlight sustainability.** Shorewood should market its eco-friendly population density, walkability, access to urban transit, and rather self-sufficient mix of commerce. Shorewood’s commitment to sustainability and “green” urban living can attract new residents with compatible lifestyles and values.

- **Integrate and/or broaden services to serve more residents cost-effectively.** The Senior Resource Center could serve as a resource to promote independent senior living with appropriate supportive services. School performance programs (sports, music, theatre, etc.) build community cohesion, but residents could benefit from the use of school facilities more directly also. Many believe that collaborations and sharing services could save money yet enable the Village to do more.

After groups presented their ideas, Grant facilitated a discussion about goals and action/strategy priorities. The group set the following priorities:

- University apartments
- More aggressive redevelopment
- Intergovernmental cooperation to increase efficiency

The concept of using a wheel tax as an alternative means of funding street maintenance projects could more fairly attribute costs to users rather than property owners.

**Implementation Planning Workshop**

The Leadership Group consisting of the Village Board, Manager, and department heads met for a two-hour facilitated workshop on the evening of May 12. Facilitator Grant first focused participants’ attention on the following vision statement:

> “Shorewood will be a desirable community that continues to attract and retain residents who value Shorewood’s community assets and rich diversity.”
Grant pointed out that several population trends were relevant to evaluating this visioning goal statement. Data from the 1990 and 2000 census show:

1. 9% growth in ages 5-10
2. 36% growth in ages 45-64
3. 20% decline in ages 65+ (opposite to all comparables)

The “Shorewood Older Adult Survey 2008 Summary Report” reported that 22.8% are now aged 55+. This projection will not be reached nationally until 2035.

Grant pointed out that under the Manager’s leadership since the 2005 workshop, staff has focused on service and efficiency improvements. The Village has implemented several key initiatives to address traffic and pedestrian safety, improve Village parks, support downtown businesses, and engage homeowners in reducing storm water run-off.

She asked participants whether strategies should focus on Shorewood as an attractive place to be an active retiree and to raise a family or as a great place to raise a family and be an active retiree. Although Shorewood can/will be both, action priorities would be different. Discussion focused on the desirability of doing both. However, participants thoughtfully considered the market reality that Shorewood’s single-family housing stock may be less attractive to families due to their expectations for more room and more modern configurations as well as lower costs.

Participants want Shorewood to be perceived as vibrant, desirable, thriving, welcoming, attractive, urban, and commercially robust and profitable. Grant asked that the group consider Shorewood being the right things to the right people rather than all things to all people. Being perceived as attractive to families with children is still a community and leadership priority, but participants agreed that being attractive to active retirees bears more active consideration. Participants did not see these as exclusive goals and were not ready to choose one over the other.

After facilitated discussions about selecting one or two priority areas for action from the extensive list of initiatives generated in 2005, the Leadership Group chose “Protect and Enhance Property Values” as the highest priority item. Participants saw other items as strategies to achieve this priority.

Grant asked the group to silently record and individually post strategies for Village leaders and staff to carry out to achieve specific goals. Eight vision statements generated specific action ideas summarized as follows:

**Protect and enhance property values:**

- **Encourage homeowners to invest in improving their property.** These could take the form of home improvement competitions and “how to” information to promote replication of and improvements to model projects, fostering neighborhood support thru sharing/bartering services, and implementing a reward and punishment system.

- **Implement more aggressive and large-scale redevelopment projects.** Ideas included campaigning to get developers to invest and implementing more aggressive CDA
development and redevelopment projects and specifically soliciting businesses the Village wants. Participants suggested creating a major attraction to draw visitors or residents, moving business to consolidate retail businesses and increase their value, and creating a town center, even if it meant investing public funds or even owning and leasing commercial space. One suggested developing Atwater Beach as a money-making business. Another suggested some risky but important changes to parking challenges.

Many suggested large redevelopment projects to promote higher value urban housing. Ideas included redeveloping older apartment buildings into higher end apartments, removing N. Oakland apartments and turning them into retail, promoting new housing on Wilson, and tearing down unsightly home and commercial structures. Others suggested exploiting the architectural appeal of current housing thru designation of a historic district.

- **Protect and enhance public green spaces.** Participants saw investments in Hubbard and Atwater Parks as well as the river trail plan as additional opportunities to protect and enhance property values.

- **Deliver quality services.** Although much progress has been made in the service area, participants were still interested in maintaining and improving infrastructure and saw lack of funding as the key to making this happen. They prioritized new funding mechanisms and state legislative action. Suggestions included sharing services and collaboration, especially with the schools.

[Details are presented in Attachment B: Leadership Workshop Implementation Strategies]
ATTACHMENT A: Community Vision Plan Meeting notes – April 4, 2009

- Increase tax base
  - Leverage and marketing
  - Highest grossing Walgreens, Culvers and Pick n Save in the state
  - Bigger Pick n Save
  - No Hardware store
- Tax cars
  - Need more taxes to keep up road, infrastructure
- Continue to market image of schools will increase tax base

- Vision
  - City-wide composting
- Strategy
  - Tax leave collection
  - Mandate composting
  - Identify people who are willing to neighborhood compost
  - Educate, educate, educate
- Localize Economy
- Multi-generational community center
- Attract valuable residents
  - Shift in paradigm (not “upscale” community, rather an educated, forward thinking “urban” community
  - Have good schools
  - Look for collaborations
  - Attract a variety of businesses
  - Walkable community
  - Affordable housing
  - Attract UWM?
- Education, strong schools
  - Ex. Victory Garden Initiative Urban Ag Program

- Book store served as a community center
- Attract businesses that are useful to the residents
- Missing stores:
  - Book store
  - Hardware

- Schools
- Schools are a community function
  - School fits in a fabric beyond children
- Shared services
- Integration
  - Senior Resource Center
  - Arts
  - Wellness/fitness
- Playground
- Parking
- Walkable

- Pesticide ban – chemical free community
- Biking community – lake to river bike paths
- Marketing tool
- Wheel tax – would require public education so public understands economic

- Housing
  - Form a leadership committee to work on planning and implementing solutions in this area
  - Promote and support block groups – Connect Shorewood
- Strategies
  - Education
    - Energy efficiency
    - Windows
    - Restoration
  - Maintenance
    - Promote/maintain values
    - Age
  - Upgrading Apartments/Parking
  - Promote independent senior living with supportive services
  - Convert small duplexes to single family
  - Historic district
- Environmental
  - Development municipal sustainability plan
    - Energy conservation
    - Parks
- UWM
- Make innovative partnerships
- Urban planning/water institute
  - Atwater beach project
- Example- Shorewood schools – solar panels
- Stable employer
- Focus group of UWM staff members
  - How do you connect

- What village should spend time/money?
  - 1. Develop the business corridor – Latoaka Plans
    - Transportation needs
    - Community based philosophy
    - Incubators (UWM & home based)
    - Professionals and retails
  - 2. Schools continue to be vital
    - What role can village play?
    - Collaboration with library/school
    - Investigate the political lines
    - Advocate to state re: educational expenses
    - Issues for young people – teens
  - 3. Explain tax value—“competitive tax rates”
    - Assessments
    - Communication issues – report more frequent
    - Educate people
  - 4. Human Resources – reach out for help
    - ex. SEED, D2D, FAB
    - Politically active in VB/SB
    - Inventory skill sets of residents
    - Capitalize on Human Resources
      - People to volunteer to help with things
      - UWM/MU
  - 5. Continue and Implement the Home Loan Program
    - emphasis on Code Compliance
ATTACHMENT B: Leadership Workshop Implementation Strategies Listing

1. Protect and enhance property values
   a. Have competitive contests to get property owners to enhance properties
   b. Educate building owners on desirability of property enhancement
   c. Call out examples of property improvements – awards program?
   d. Redevelopment – Think Bigger
   e. Create a major attraction to draw visitors or residents
   f. Create town center thru moving businesses and increasing their value
   g. Foster shared neighborhood help/barter services for repairs and maintenance
   h. Promote historical district; exploit architectural appeal of housing
   i. Safety: decrease crime
   j. Implement more aggressive CDA development efforts
   k. Better infrastructure: sidewalks/streets
   l. Develop Atwater Beach as a business (money maker)
   m. Directly solicit businesses we want
   n. Have a business incubator for home based businesses
   o. Support more public transportation: new systems and light rail
   p. Increase combined/shared services so we look very forward-thinking and save money
   q. New housing on Wilson
   r. Commercial district provide essential/convenience stores
   s. Pay people to move to Shorewood (if they stay awhile, subsidize rents and mortgages)
   t. Let Victor do his code compliance job
   u. Flat out campaign to get developers to invest
   v. Solve parking by taking risks, e.g. street permits globally
   w. Reward excellence in property maintenance
   x. Not afraid to sue homeowners for code violations
   y. Consolidation of services
   z. Organized legislative pressure on funding issues

2. Promote vibrant urban housing
   a. No permit rule for some permits
   b. Work hard to upgrade rental units; replace old buildings with higher end apartments
   c. Consolidate retail area
   d. Remove apartments on N. Oakland and turn into retail
   e. Tear down unsightly structures (homes, commercial)
   f. Redevelop older apartment buildings; update, make them desirable, connect to UWM for education
   g. Provide convenient shopping choices

3. Deliver quality services
   a. Intergenerational cooperation
   b. Prioritize to the current demographics
   c. Consider new funding mechanisms: transportation utility; stormwater utility

Visioning Report 2009
d. Maintain/improve infrastructure
  e. Adequately fund infrastructure improvements

4. Protect and enhance public green spaces
   a. Enhance Hubbard park
   b. Implement river trail plan
   c. Encourage school involvement in public property maintenance, e.g. Students Help Neighbors Day
   d. Atwater Park enhancement

5. Remain committed to open, interactive communication
   a. Sustainability Plan

6. Collaborate to promote educational excellence
   a. Discuss further shared services including schools

7. Protect and enhance our environment
   a. Develop a sustainability plan for the village government
   b. Have a Shorewood Sustainability Day

8. Maintain a safe, walkable, small-town, urban living experience
   a. Use Village money to develop a model commercial development (become a landlord)