



GREEN BICYCLE CO.

Building conscious communities

Housing Development Policy Guide

CITY OF APPLETON | WISCONSIN

Project Proposal

Version 3
September 19, 2023

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Statement of Qualifications

Green Bicycle Co. was established in early 2020. We have a home office in the heart of Sheboygan with three project dedicated staff members and several dedicated support staff.

Green Bicycle Co. has served a variety of clients, providing services that include cultural asset mapping, non-profit strategic planning, community building, outreach planning and facilitation, and organizational structure and policy development. Collectively, Green Bicycle Co. staff hold over 45 years of experience in planning and have successfully developed strategic implementation plans for our clients near-term and long-term initiatives. While we are seasoned professionals, we pride ourselves on a fresh perspective for every project.

The Green Bicycle Co. team is a group of critical thinkers and patient listeners whose varied experiences make us a great fit for the City of Appleton's Housing Development Policy, Process & Stakeholder Engagement Services project.

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About Us



Green Bicycle Co. is dedicated to **Creating Conscious Communities**. This is a commitment to ensure radically inclusive engagement, meaningful communication, and a fresh perspective to every community we work with for the duration of our project and beyond. Green Bicycle Co. will engage in intensive community outreach methods to ensure that this project is equitable, sustainable, and thoughtfully constructed.

Heather Cleveland, Green Bicycle Co. 's Founder and President, Urban Planner, Environmental Engineer, and Community Developer, will serve as Project Manager, and she brings strong leadership, communication, and strategic planning skills to the team. Chelsea Couette, Economic Development Planner, brings nearly a decade of commercial real estate development and investment experience and an education in urban planning and economic development to help provide valuable insight to the project. Nancy Maring, Urban Planner, has specific economic and community development experience through her previous career in municipal planning.

All members of the Green Bicycle Co. team are committed to creating a great experience and project for the City of Appleton. Green Bicycle Co. staff have access to a variety of resources, professionals, and organizations to further collaborate and contribute to our understanding of the unique needs of our clients and the projects we undertake.

Vision

Green Bicycle Co. is a vibrant, inclusive, sustainable, and engaged community of individuals that support and learn from and with each other.

Mission

The Green Bicycle Co. mission is to educate and engage with the community in a way that encourages and inspires a sustainable lifestyle. Green Bicycle Co. goods, projects, and experiences focus around a way of life that is thoughtful, collaborative, and sustainable.

Meet Our Team



Heather Cleveland
Project Manager

Heather will manage the project and work closely with the City to ensure the project moves in the right direction, engages stakeholders with radical inclusion, and milestones that allow opportunities for feedback.

Heather's leadership experience in non-profits and community projects, consulting experience and military experience, along with her education and ability for critical thinking and communication make her a great fit for the role. Heather holds Bachelor of Science in Civil Engineering and Master of Urban Planning degrees from the University of Wisconsin-Milwaukee. She is a compassionate listener and visionary that quickly sees processes and systems and finds inspiration and challenge from different viewpoints and experiences.



Chelsea Couette
Economic
Development Planner

Chelsea will lead a variety of tasks and phases of the project to help facilitate activities and engagement to create a well-rounded final product that provides relevant strategies for both near term, as well as future implementation.

Chelsea has extensive experience in real estate development and will use this knowledge to identify strategic opportunities for policy feedback and future investment and growth. Chelsea holds a Master of Urban Planning degree from the University of Wisconsin-Milwaukee with concentrations in Real Estate Development and Economic Development, as well as a Bachelor of Science degree from the University of Wisconsin-Madison.



Nancy Maring
Urban Planner

Nancy will assist with a variety of tasks and phases of the project. Her municipal experience and continued education of best and innovative practices will help the evolution of the project be both within reach to the City while introducing new ideas.

As an Urban Planner with Green Bicycle Co. Nancy will draw on her experience and expertise while supporting public engagement and analysis efforts. Nancy holds a Master of Urban Planning degree from the University of Wisconsin-Milwaukee and has nearly a decade of municipal planning experience which has provided her exposure to many varied projects, issues, and plans. Nancy has experience in economic development, community development and placemaking efforts.

Additional staff may join our team should Green Bicycle Co. be awarded the project.

Project Approach

Green Bicycle Co.'s ("GBC") project approach aims to engage with relevant stakeholders and evaluate existing market conditions, ordinances, policies and procedures as it pertains to housing availability, density and development in the City of Appleton in order to create a reference resource ("Guide") for the Task Force, staff and City officials. The Guide will also include housing policy and entitlement procedure recommendations to ease and streamline any identified barriers to development.

The Guide shall be a reflective, responsive and accessible resource to inform the community, stakeholders and policy makers about the direction set forth for the growth of housing and potential investment opportunities in the City.



Components to Success

Community Metrics

Scenario Planning

Engagement & Feedback

Accessibility

Accountability

Action Plan

Existing Resources

Innovation

Project Approach Components



1| Metrics

Focus on specific metrics that pertain to quality and availability of housing types and economic and population growth to generate a quantitative understanding of existing housing conditions and opportunities in the community.

2| Scenario Planning

Include scenario planning to contrast the range of policy choice affecting the built environment and the metrics being evaluated. This approach, in addition to narrative, helps stakeholders understand future housing development potential. These scenarios offer compelling visuals and info-graphics on metrics that will keep people engaged and solicit critical thinking and insightful feedback.

3| Engagement & Feedback

A comprehensive group of stakeholders will be engaged to provide input and feedback during the development process and before the final Guide is presented to ensure representation and buy-in from staff, officials, and the community.

4| Accessibility

Design a Guide that can be accessed and understood by people of all backgrounds and abilities, as well as City staff and officials who need a relied-upon resource to assist decision making based on a variety of metrics. The Guide should be available in a format that is accessible and acceptable to feedback on an ongoing basis.

5| Accountability

The Guide will include accountability strategies for the recommendations being made that are developed alongside the Task Force. Ideally, the Guide will be utilized by stakeholders to positively influence change in policy and procedures and future planning and investment efforts.

6| Action Plan

As part of the Recommendations being made in the Guide, GBC and the Task Force will collaborate to suggest follow-up action items to move forward and/or achieve the goals of the Recommendations (e.g. responsible parties, timelines and potential funding options, etc)

7| Existing Resources

Existing resources will be reviewed and evaluated in the development of the Guide to the fullest extent possible to supplement the project team understanding of the community and enhance the impact of the Guide recommendations.

8| Innovation

Housing development and policy are high priority topics throughout the State of Wisconsin and the U.S.; our team will identify and recommend innovative ways encourage housing development projects through a combination of research and partnerships.

Scope of Work

Task 1: Introduction & Stakeholder Engagement Plan

GBC will discuss and propose a meeting and reporting schedule with the established Task Force participants, with at least one meeting per month to begin. Additionally, work will be done to create the foundational elements on which the Guide will be built and completed. See Project Timeline for overall project timing schedule.

A stakeholder engagement plan ("Stakeholder Engagement Plan") will be developed. The Stakeholder Engagement Plan will identify strategies to gather data and feedback from relevant internal and external stakeholders, making sure to reach pertinent community stakeholders through multiple mechanisms, as well as identify specific audiences that are often not represented in outreach efforts, or who may not traditionally participate in engagement opportunities.

Deliverables: Task Force Meeting Schedule and Stakeholder Engagement Plan



Innovative Guide Element: Housing Redevelopment Scenario Planning

GBC, Task Force participants and stakeholders will work together through scenario planning activities and stakeholder meetings to provide input and guidance for the redevelopment of strategically identified City- or privately-owned parcel(s) to create a pattern book of potential housing development options which seek to encourage the construction of and investment in higher-density, more affordable housing options.

- Task 1: GBC and Task Force to identify site(s) most suitable for Housing Redevelopment
- Task 2: GBC to present sites(s) to Stakeholders (Internal & External) during stakeholder engagement period. Stakeholders to provide Recommendations for potential housing redevelopment projects based on professional experience and market conditions.
- Task 3: GBC to summarize Recommendations in the Guide, along with necessary approval procedures and policy adjustments to accommodate the Recommendations.

GBC will also research alternative and/or supplemental funding opportunities that may be utilized to bridge financing gaps or ease potential burdens to development that would prohibit or encumber future investment in multi-family housing in the City of Appleton.

Task 2: Policy Review & Stakeholder Engagement

Policy Review

Prior to engagement with stakeholders, GBC will conduct a thorough review of the policy, planning, ordinance and procedural materials provided by the Task Force. These efforts will allow GBC to engage in thoughtful conversations with a variety of Internal and External Stakeholders and provide productive feedback to potential impediments to housing development from a policy perspective.

In conjunction with Policy Review, GBC will review the following reports provided by the City of Appleton: Fox Cities and Greater Outagamie County Regional Housing Strategy and College North Neighborhood Plan.

Stakeholder Engagement – Internal Stakeholders

Engagement with Internal Stakeholders, to be identified by GBC and Task Force participants, will be integral in providing feedback and insight into current regulation, review, approval and inspection policies and processes of housing-centric projects. During this process, Internal Stakeholders will aid in identifying operational and policy deficiencies and participate in the prioritization of policy or procedural adjustments to ease barriers to development and investment based on both Internal and External Stakeholder feedback.

Stakeholder Engagement – External Stakeholders

GBC will conduct outreach and engagement efforts with strategically identified External Stakeholders. Local and regional economic development organizations and housing development, construction, sales, leasing and investment firms and professionals, through surveys and interviews, will provide valuable insight into historical housing trends and a snapshot of current market conditions. These External Stakeholders will be key in identifying market gaps, future housing development potential and recommendations for impactful municipal policy and ordinance adjustments to favorably position the City for on-going and future housing growth and investment.

**Deliverables: Internal & External Stakeholder Feedback Summary,
Market Summary & Draft Recommendations**

Task 3: Draft Guide

Summary of Findings & Recommendations

In the final phase of the project, a draft Guide will be prepared for the Task Force, which summarizes the findings conducted in the Stakeholder Engagement efforts, the market research and information gathered from the provided reports, as well the Recommendations being made to the Task Force. The Recommendations will be focused on opportunities to improve the review and approval of potential housing development projects and strategic policy adjustments to encourage the development of higher-density, more affordable housing options.

Deliverables: Draft Guide

Task 4: Final Guide

GBC will deliver the final Guide document and make a presentation of the Guide to the Task Force participants.

Deliverables: Final Guide & Presentation to Task Force

Deliverables & Meeting Schedule

October 10, 2023 - Task Force Meeting & Meeting Schedule

October 24, 2023 - Stakeholder Engagement Plan

November 21, 2023 - Monthly Task Force Meeting/Update

December 19, 2023 - Monthly Task Force Meeting
Draft Stakeholder & Market Feedback Summary

January 16, 2023 - Monthly Task Force Meeting
Draft Recommendations Summary

February 20, 2024 - Final Guide & Presentation to Task Force

TBD 2024 - Additional Presentation Date



Project Timeline

Task	2023						2024			
	Oct	Nov	Dec	Jan	Feb					
0 Project Commencement	10/05/2023									
1 Stakeholder Engagement Plan										
2 Policy Review										
2 Data & Market Information Review										
2 Internal Stakeholder Engagement										
2 External Stakeholder Engagement										
3 Draft Guide & Recommendations										
4 Final Guide & Presentation										

Investment v3

Task	Description	Investment v3	
		Hours	Investment
1	Stakeholder Engagement Plan	20	\$2,000
2	Policy Review	40	\$4,000
2	Data & Market Information Review	30	\$3,000
2	Stakeholder Engagement (Internal & External)	120	\$12,000
3	Draft Guide Summary of Findings & Recommendations	50	\$5,000
4	Final Guide & Presentation to Task Force	20	\$2,000
-	Travel, Accommodations, Guide & Engagement Expenses	Lump	\$4,000
TOTAL INVESTMENT		\$32,000	
Alt. Option Costs	Formal Presentation (In Person)	Per Mtg	\$500
	Formal Presentation (Virtual)	Per Mtg	\$300

Hourly rates are average \$100/hour and vary depending on staff experience. A retainer invoice will be sent upon being awarded the project, and subsequently on the first of the month for the duration the project per below:

- October 2023–February 2024: \$6,400 Monthly

Additional Fees: Additional fees for employees to complete additional items not identified in the Scope of Work is \$100/hour plus reimbursement for mileage and supplies.

Investment v3

Investment v3; \$32,000. Data & Market Information Review will include a review of the existing reports, Fox Cities and Greater Outagamie County Regional Housing Strategy and College North Neighborhood Plan, provided by the City of Appleton. Additional data and market information research and sources may be recommended to fill in potential gaps discovered during internal and external engagement efforts. Scenario Planning work will be reduced slightly from the initial proposal, but it will still be a part of the Draft Guide for consideration.

Contract

City of Appleton to provide GBC with City of Appleton Consultant Services Contract for review. The terms of the contract shall be mutually agreed upon by GBC and the City of Appleton prior to execution of the contract and commencement of project work.

Insurance

Green Bicycle Co. certificate of insurance attached, see Exhibit B.

Project Experience & References



Cultural Asset Mapping

The John Michael Kohler Arts Center (JMKAC) engaged Green Bicycle Co. to begin a process of cultural asset mapping in September 2020. Cultural asset mapping identifies the resources in an area that make it unique. These assets include the people, places, and organizations that make valuable contributions to the community; they influence the cultural fabric of a region. By identifying and recognizing these assets within the City of Sheboygan, this project will make all these treasures, both tangible and intangible, more visible.

In Phase II of the project, Green Bicycle Co. worked alongside several JMKAC departments and community partners, engaged surveys and interviews, and worked towards recommendation implementation to increase representation, ownership, and a sense of belonging at Levitt AMP Sheboygan Music Series and beyond.

Ann Brusky—Deputy Director of Programming, John Michael Kohler Arts Center

Telling the Full History

In 2022 Green Bicycle Co. partnered with the Sheboygan County Historical Museum, with funding through from the Telling the Full History Fund - a grant program of the National Trust for Historic Preservation, made possible through the National Endowment for the Humanities. The project's goals were to highlight the roles that underrepresented communities played in the history and evolution of Sheboygan County, as well as educating and creating a model for continued data collection, communications, and partnerships. Green Bicycle Co. worked alongside the Sheboygan County LGBTQ Alliance, Hmong community, and women in politics to collect and archive information and create opportunities for engagement and exhibition of local stories.

Travis Gross—Executive Director, Sheboygan County Historical Society and Museum

Neighborhood Engagement & Development

The City of Sheboygan has made neighborhood development and engagement a focus area in the recent past, which creates a stronger tie and better communication between the City and its residents, and also helps empower neighborhood groups to advocate for themselves, solve problems and improve quality of life. Nancy, as a Planner with the City of Sheboygan, was the key City liaison engaging with neighborhoods, helping them find resources, form official associations, set goals and accomplish improvement projects. Nancy helped the Sheboygan PD become more involved with neighborhood groups and supported the new Beat Cop program - where officers made deeper connections in designated neighborhoods to reduce calls for service and open lines of communication to be proactive in those areas. Heather was involved in neighborhood engagement and development as a non-profit leader in one of the designated Beat Cop neighborhoods. Heather and her group hosted events and became an incredibly valuable community resource and connector.

Sgt. Andrew Kunding, Sheboygan Police Department

Contact Information will be provided upon request.

Exhibit A

CITY OF APPLETON PRICE QUOTATION FORM
TO BE UPDATED UPON APPROVAL OF THE REVISED PROPOSAL AND BUDGET
BY COMMON COUNCIL AT THE OCTOBER 4, 2023 MEETING.



DEPARTMENT OF COMMUNITY &
 ECONOMIC DEVELOPMENT
 100 North Appleton Street
 Appleton, WI 54911
 TEL (920) 832-6468

PRICE QUOTATION

For

**Housing Development Process, Policy, &
 Stakeholder Engagement Services**

Vendor Name: Green Bicycle Co.
 Mailing Address: 1117 N 8th Street
Sheboygan, WI 53081
 Telephone: 920-287-3661
 Email: heather@greenbicycleco.com

TOTAL COST OF PROJECT SERVICES..... \$ 40,000

ALT. OPTION COST: Cost for each formal presentation of
 findings per Final Deliverable 6.d.

IN PERSON..... \$ 500

VIRTUAL..... \$ 300

Heather Cleveland
 Quote Prepared By

8/18/23
 Date

Exhibit B



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 08/17/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: State Farm, Pete Fullerton, 1305 North 8th Street, Sheboygan, WI 53081. CONTACT NAME: Pete Fullerton, PHONE: 920-458-4211. INSURER(S) AFFORDING COVERAGE: INSURER A: State Farm Fire and Casualty Company, NAIC #: 25143. INSURED: Green Blycle Co LLC, 1117 North 8th Street, Sheboygan, WI 53081.

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

Table with columns: INSR LTR, TYPE OF INSURANCE, ADD INSD, SUB WVD, POLICY NUMBER, POLICY EFF (MM/DD/YYYY), POLICY EXP (MM/DD/YYYY), LIMITS. Rows include Commercial General Liability, Automobile Liability, Umbrella Liab, Excess Liab, Workers Compensation and Employers' Liability.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE [Signature]



Thank you.

Contact Green Bicycle Co.
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Chelsea Couette
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