

III. PLAN GOALS, OBJECTIVES AND STATEMENT OF NEED

The City of Brookfield is proposing to create TID #3 to:

- Finance public improvements needed to stimulate development and redevelopment of properties that otherwise would not develop or redevelop without public intervention due to needed public improvements.
- Provide incentives to the private sector which will result in the rehabilitation of properties that would not otherwise occur without public intervention, and
- Stimulate the orderly development of commercial, housing and other mixed-uses as envisioned in the City Master Plan.

The Brookfield 2020 Master Plan has identified the area included in TID #3 to be an area in need of revitalization and reinvestment in order to sustain the significant economic role that the area serves in the community. The area is among the largest concentrations of economic activity in Wisconsin and contains some of the largest taxpayers in Waukesha County and Brookfield. However, there are indicators that the area is in decline and therefore should be of concern to elected and appointed officials as such conditions impact the long-term economic viability of the community.

- There has been a 1.87 % decline in the assessed property values in TID #3 between 2001 and 2004 values, or an actual \$ 1,944,600 reduction in overall values. (Source: Brookfield City Assessor, Properties listed in Appendix 2).
- TID #3 represents approximately 0.852% of the total land area in Brookfield¹ but represents approximately 2.02% of the total assessed value of the City; therefore an economic decline in this area can impact the City as a whole in relation to its land area and its strategic location in the Bluemound Road Corridor – the City's "Central Business District."
- Equalized values for the District have actually increased between 2001 and 2003 (final 2004 equalized figures not yet available.) (Source: City Assessor).

The Project Plan acknowledges that equalized values have increased in the District, but cites previously prepared consultant studies that raise concerns about the future market conditions within the Executive Drive Office Park. These studies raise concerns about future conditions that may make it difficult to retain Class A office status along Executive Drive.

- Calhoun Road South Neighborhood Plan: pages 4, 7, 24
- Brookfield Square Area Redevelopment Strategy: page 26
- The Demand for Office Space in the Brookfield Square Mall/Executive Drive Redevelopment Area: pages 4, 13, 24

¹ Waukesha County Land Information System (17,456 total acres in Brookfield).

Excerpts from such source documents are incorporated in the Project Plan as Appendix 1.A.

- Much of the office-building inventory in TID #3 has been surpassed by newer buildings in terms of design, facilities, and infrastructure. Some of the buildings in the Executive Drive submarket are perceived to be somewhat “tired” and “dated.” Rents for space in the Executive Drive submarket have declined. (Source: Gruen Gruen + Associates, March 2003)².
- According to real estate industry sources, the state, age, and condition of a number of properties in TID #3 contribute negatively to the market attractiveness and value of surrounding properties. (Source: Gruen Gruen + Associates, March 2003)³.

To address these conditions, Brookfield prepared a series of strategies intended to rehabilitate the District and the surrounding area. These strategies represent a detailed description of how the Project Plan goals and objectives will be achieved.

Calhoun Road South Neighborhood Plan – July 2001

In July 2001, the City Master Plan was amended to create a land use and transportation improvement strategy for the Bluemound Road corridor – a planning document called the Calhoun Road South Neighborhood Plan. The plan is based upon a vision that repositions the competitive character of the Bluemound Road corridor. The vision suggests that steps be taken in order for the corridor to continue to be successful in light of the aging of properties in the corridor and new competing areas located west of Brookfield.

The planning document, as it relates to TID #3 and the surrounding area, states:

“Much of this district’s development is not positioned well in the region and is in danger of losing value through a lack of competitive edge.

“The vision for this District is the creation of fully mixed-use, interactive, urban infill district combining regional and service retail, entertainment, office, housing, hospitality, convention, medical, and public uses fronting an improved gridded street framework. This District is intended to become the primary commercial core for the City and the western metro area at large, and should be positioned to accommodate higher density development defined by strict design controls established by the City. The mixed-use approach is intended to provide a mechanism to enhance

² The Market for Retail Uses at the Brookfield Square Mall/Executive Drive Redevelopment Area, Gruen Gruen + Associates, March 2003; The Market for Office Uses at the Brookfield Square Mall/Executive Drive Redevelopment Area, Gruen Gruen + Associates, March 2003; The Market for Apartment Uses at the Brookfield Square Mall/Executive Drive Redevelopment Area, Gruen Gruen + Associates, March 2003.

³ Ibid.

the value of existing development and induce demand for additional development.

"The expansion and redevelopment of Brookfield Square Mall occurs in two parts. The first part involves the renovation of the mall itself. The second part involves a public/private partnership for developing an external lifestyle retail center on the northwest side of the mall. Uses include home furnishings, other retailers, and restaurants. This development occurs in a pedestrian oriented 'main street' format.

"The repositioning of land uses along Executive Drive is closely tied to what happens on the mall property. Infill development occurs along Executive Drive and this new development promotes the creation of a vibrant connection between mall expansion/renovation and existing office properties through a celebrated 'public realm.'

"Finally, due to the complexity of this type of infill redevelopment, the City should consider creating a special authority with powers of effective implementation." (Editor's Note: The Brookfield Community Development Authority has since been created to serve this role).

Brookfield Square Area Redevelopment Strategy – Implementation of the Calhoun Road South Neighborhood Plan/Brookfield Square Area, City of Brookfield, October 24, 2002

Subsequent to the adoption of the Calhoun Road South Neighborhood Plan, the City prepared a report outlining a strategy to implement the planning vision entitled the Brookfield Square Area Redevelopment Strategy.

The strategy report states:

"Despite the amount of retail and office space within the Mall area, it fails to provide Brookfield with a meaningful center of activity, a place where the community can gather and identify with each other in an environment not defined by 'Product' alone. But due to the built-out reality of this area, the only available land to develop is the underutilized land between existing buildings such as setbacks, parking lots and sites for future phasing, or the redevelopment of the developed properties themselves. By its very nature, this represents an exercise in infill development, or urban acupuncture, aimed at adding buildings at key locations to create synergies of program and activity while recasting the sensibility of the overall place. Such infill is difficult to achieve due to its expense and complicated transactions. As a result, it is recommended that the City enter into a series of public/private partnerships to offer new investment vehicles to the private marketplace and to begin the momentum of change in this important district."

The strategy report refines the mixture of uses to be located within the infill area between Executive Drive and Brookfield Square to include the introduction of townhouses and apartments located above retail and restaurant uses, facilitated through

the introduction of parking decks. The strategy report concludes that this refinement addresses the changing needs of the individuals in the marketplace seeking unique live-work-shop environments where there is a combination of retail, office, and housing opportunities. The report explains that:

“When creatively applied, this infill approach should preserve portions of its landscaped campus and leverage public funding for the amount of structured parking or infrastructure required creating developable land opportunities. We believe this infill development combined with the strength of the Executive Drive location will provide a new platform from which it may be marketed effectively.”

The strategy report also identifies other initiatives the City should pursue to achieve the overall vision, including the reconstruction of the Mall’s ring road – called “Main Street” and the creation of a public park called “Town Square.” The report explains that:

“There currently exists a sharp disconnection between the properties along Executive Drive and the Mall. In fact, much of this land area is given over to servicing and residual parking; its identity is one of a ‘back door.’ In order for the goals of the previous two concepts to be achieved, this area must be redeveloped to become an integrating ‘seam.’ We believe this may be accomplished by redefining this portion of the Mall’s ring road to be a pedestrian-friendly and visually active ‘Main Street’ lined by the full range of uses described above. By performing the redesign and construction of this street and assuming its ownership and maintenance, the City will have provided the framework upon which a gateway to the district from Bluemound Road may be created – a critical component to the success of TID #3.

“In order to integrate the enclosed Mall program into this proposed urban neighborhood and provide a central focus for the district, we believe the City should create a ‘Town Square,’ or urban park in a manner sensitive to the existing wetlands and natural area located west of the mall. This should be designed to promote a strong and identifiable public space, and should be clearly defined by its adjacent development. This space should have special care taken towards accommodating the landscape and urban design details that make such spaces successful including strong edge definition, a central feature, walkways and seating, and special lighting. In addition to completing the design and construction of this park, we also recommend the City assume its ownership and maintenance as an additional reinvestment tool. When complete, this space will become the recognizable center of this new urban district.”

Calhoun Road South Neighborhood Plan – July 2001 – Lands north of Bluemound Road

In addition to the redevelopment strategy envisioned for the Brookfield Square/Executive Drive area, the Calhoun Road South Neighborhood Plan envisions certain redevelopment and development objectives located on lands north of Bluemound Road opposite Brookfield Square. The neighborhood plan states that this area

contributes to the overall economic health of the Brookfield Square/Executive Drive Area. Because of this symbiotic relationship, lands located north of Brookfield Square have been included in TID #3. The planning document states that:

"In addition, the 'Fountain Square' property northwest of the mall (a proposal to replace the Storm golf center with a mixed-use development) will incorporate multi-family and retail uses, and provide an urban edge to Bluemound Road, fronting on a service/slip road." (Editors Note: This reference now includes Phase II of the Georgetown Square project that proposes to add housing to a portion of the Storm property, whereas Fountain Square is proposed as commercial uses. Together, Georgetown Square and Fountain Square create the mixed-use development.)

The Calhoun Road South Neighborhood Plan also recommends the construction of new streets and the reconfiguration of existing street intersections that will address transportation concerns in TID #3. These transportation improvements support the redevelopment efforts envisioned in the plan in order to achieve a revitalized and rehabilitated business district. Because of the relationship between the economic health of TID #3 and these transportation improvements, lands located north of Brookfield Square have been included in the District including properties that will help build the recommended street network. The planning document states:

"Executive Drive: As Executive Drive approaches Bluemound, it is proposed to angle eastward to avoid the existing Barnes & Noble Bookstore as it crosses Bluemound and connects with Wisconsin Avenue. The intersection of Executive and Bluemound should remain signalized. Executive should be renovated to include on-street parallel parking where possible, and should have an urban streetscape redesign infilling street trees, pedestrian lighting, crosswalks, and special paving features around the Executive Square."

"Brookfield Square Drive (Main Street): Brookfield Square Drive is proposed to be renovated from being a mall ring road to being an urban street on the west side of the mall. This condition revises its current location and allows connection to a larger grid of new local streets, and accommodates the development of mixed-use infill development along the way. Brookfield Square Drive is proposed to cross Bluemound and connect with Wisconsin Avenue to the north. A special roundabout and central amenity are proposed with the 'main street retail' development and urban streetscape elements elsewhere to include street trees, benches, bike racks, pedestrian lights, crosswalks, and special sidewalk paving materials. The signalized intersection of Brookfield Square Drive and Moorland Road is proposed to move northward to accommodate the development in Parcel 31 (Editor's note: This refers to the area near the Sheraton Hotel site and Sears property north thereof), as well as provide traffic safety benefits with a greater distance between the interchange and the intersection."

“Wisconsin Avenue: Wisconsin Avenue is proposed as a two-lane section with two parallel parking lanes. Wisconsin Avenue should be extended to Pilgrim Parkway. A naturalistic streetscape planting approach is recommended along the Wisconsin corridor, which places street trees and plantings in informal massings, interconnected by a meandering sidewalk.”

Together, these new and reconstructed streets and intersections create a more effective system of streets that facilitate more efficient movement of traffic and complement the rehabilitation of properties in the surrounding area. Most of these street improvements are included as public improvements listed for TID #3 and are critical to the overall success of the business district.

Other Public Improvement Needs

The Brookfield Square Area Redevelopment Strategy report also identified the need for the rehabilitation of other public facilities in TID #3, including the need to improve other public streets and utilities, including sanitary sewer, water main, and storm sewer/drainage systems. Specifically, the report identified the needs and costs associated with the improvements to the Brookfield Square and Deer Creek Sanitary Sewer Interceptors, the Deer Creek and the Dousman Ditch Subwatershed Drainage Areas, and the public water system that serve the District. Improvement costs are identified in Section VI of this Project Plan. The Project Plan includes those improvements in Project Plan costs.

Relationship between Plan Goals, Objectives and Strategies and the Need for Rehabilitation or Conservation Work in the Project Area

The Project Plan goals, objectives and strategies outlined above address the need for the rehabilitation or conservation of buildings or properties in TID #3. The strategies outlined will assist in:

1. Carrying out plans for a program of repair and rehabilitation of buildings or improvements.
2. Result in the acquisition of real property and demolition, removal, or rehabilitation of buildings and improvements on properties where necessary to eliminate unsanitary or unsafe conditions, reduce traffic hazards, eliminate obsolete buildings or uses detrimental to the public welfare, to otherwise remove or prevent deterioration or provide land for needed public facilities.
3. Install, construct or reconstruct streets, utilities, parks, and other improvements carrying the objectives of redevelopment plan (or urban renewal project).
4. The disposition of any property acquired in the area of the Project Plan for uses in accordance with the objectives of the redevelopment plan (or urban renewal project). Some property acquired by the City may be sold at discounted

prices to induce and facilitate development by the private sector. Discounts, if any, will be determined on a case-by-case basis.

Relationship Between Plan Goals and Objectives and the Orderly Development of the City

The Project Plan goals, objectives and strategies, outlined above, promote the orderly development of the community since these goals, objectives and strategies are a direct extension of the City Master Plan. The goals, objectives and strategies were prepared under a community-based planning process – the Calhoun Road South Neighborhood Land Use and Transportation Plan – and are consistent with recognized comprehensive land use and transportation planning methodologies and practices. The community-based planning process included significant input from the community, informed by professional land and transportation planners, which provided Brookfield’s appointed and elected officials a widely represented information base for establishing public policy. Representatives of the School District of Elmbrook, Waukesha County Board of Supervisors, and the Waukesha County Department of Transportation – among other regional partners – were members of the community-based task force that assisted in the planning process.

The Project Plan goals, objectives and strategies are also consistent with the “balanced growth” objectives of Brookfield’s 2020 Master Plan. The “balanced growth” concept encourages new commercial investments and the resultant tax revenues to be created in the community to offset increasing public costs. However, such investments should be located in limited, targeted areas so that the overall composition of the community will remain largely unchanged. These “Targeted Intervention Areas” represent an orderly pattern of balanced, controlled growth. TID #3 area is located in a critical area of one of the most significant Targeted Intervention Areas in the community – the Bluemound Road Corridor. Map 2 illustrates the City’s Targeted Intervention Areas and the location of TID #3.

MAP 2 CITY OF BROOKFIELD TID #3

YEAR 2020 MASTER PLAN TARGETED INTERVENTION AREAS

