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**VILLAGE OF WAUNAKEE / TOWN OF WESTPORT  
JOINT PLAN COMMISSION  
Town of Westport Community Room  
5387 Mary Lake Road  
September 10, 2019 6:00 PM**

Agendas may change prior to the commencement of the meeting.  
Please check the posting board at the Village Hall, 500 W. Main Street,  
Waunakee, Wisconsin for the current agenda.

**AGENDA**

**CALL TO ORDER**

**ROLL CALL: Ken Sipsma, Dean Grosskopf, Eileen Bruskewitz, Brad Zeman, Brian Malich, Brian Wallace**

**MINUTES**

**1 July 9, 2019**

**PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA**

**NEW BUSINESS**

- 1 Initial Consultation for Dorn CSM on Meffert Road, Town of Westport**
- 2 Update on Housing Task Force Study**
- 3 Update on Veridian Consult for the Breunig Property at STH 19 and Schumacher Road**

**ADJOURN**

Any person who has a qualifying disability as defined by the Americans with Disabilities Act that requires the meeting or materials at the meeting to be in an accessible location or format should contact the municipal clerk at (608) 850-8500, 500 West Main Street, Waunakee, Wisconsin, at least twenty-four hours prior to the commencement of the meeting so that any necessary arrangements can be made to accommodate each request.

**VILLAGE OF WAUNAKEE BOARD AND PLAN COMMISSION MEETING  
TOWN OF WESTPORT BOARD AND PLAN COMMISSION MEETING**

Notice is hereby given that the Village or Town Board or Village or Town Plan Commission may attend this meeting. No action will be taken by the Village or Town Board or Village or Town Plan Commission at this meeting.

*Next scheduled meeting is 10/15/2019 6:00:00 PM.*

**VILLAGE OF WAUNAKEE/TOWN OF WESTPORT  
JOINT PLAN COMMISSION MEETING  
Town of Westport Community Room  
5387 Mary Lake Road, Town of Westport  
July 9, 2019 6:00 PM**

**Meeting Minutes**

**CALL TO ORDER**

The meeting was called to order at 6:00 p.m.

**ROLL CALL:**

**Present:** Ken Sipsma, Dean Grosskopf, , Brad Zeman, Brian Malich, Brian Wallace

**Absent:** Eileen Bruskewitz

**Also Present:** Tom Wilson, Kevin Even, Tracy Meinholz, Jerry Tierney, Mike Lawton, Don Tierney, Gerald Schutz, Aaron Aspenson, Jimmy Lang.

**MINUTES**

**1 June 11, 2019**

Motion Malich, second by Zeman, to approve the minutes from the June 11, 2019 Joint Plan Commission meeting as presented. Motion carried 5-0.

**PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA:** None

**NEW BUSINESS**

**1 Public Hearing and Discussion/Action on a Rezone Request, Schutz, 5540 Gerend Road, Town of Westport**

The public hearing was opened at 6:03 p.m. Mr. Wilson gave an update on the action taken at the Town Plan Commission meeting the previous evening. He stated that the Town recommended approval conditioned that the setback from Gerend Road be 28', River Edge be 25', and all other setbacks remain as county R-1 setbacks. The public hearing was then closed at 6:06 p.m. Motion Grosskopf, second by Wallace, to recommend approval of the rezone from County R-1 to Village R-1 to the Village and Town boards as recommended by the Town Plan Commission. Motion carried.

**2 Public Hearing and Discussion/Action on a Request for Conditional Use Permit to Allow Outdoor Patio Service, Boston's Pizza, 1370 Water Wheel Drive, Village of Waunakee**

Chairperson Sipsma opened the public hearing at 6:11 p.m. Mr. Even went over the conditions of the CUP document and answered questions from the members. No one from the public wished to speak. The public hearing was closed at 6:13 p.m. Motion Zeman, second by Wallace, to approve the conditional use permit as presented. Motion carried 5-0.

**3      Discuss and Take Action on Proposed Signage Plan, Festival Foods, Corner of Woodland Drive and CTH Q**

Mr. Even stated that Festival has withdrawn the retaining wall sign from the submittal after concerns brought up at the Village Plan Commission meeting the previous evening. Motion Wallace, second Grosskopf, to approve the building signage as presented with the withdrawal of the retaining wall sign by the applicant. Motion carried 5-0.

**4      Discussion/Recommendation on Proposed Changes to the Village Zoning Code of Ordinances Related to Signs**

Mr. Even gave background on the proposed changes. These changes would also apply to the Town as part of the zoning code. The Commission members directed staff to work on the language to comply with the court case, but to make the changes as minimal as possible. No formal action taken.

**ADJOURN**

Motion Zeman, second Grosskopf, to adjourn the meeting at 6:35 p.m. Motion carried.

**Respectfully Submitted:**

Tracy Meinholz, Joint Plan Commission Secretary

**WAUNAKEE/WESTPORT JOINT PLAN COMMISSION SUMMARY SHEET**

**MEETING DATE:** 09/10/2019

**ITEM:** New Business No. 1

**TITLE:** Initial Consultation for Dorn CSM on Meffert Road, Town of Westport

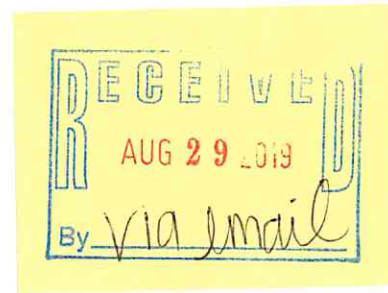
**ISSUE SUMMARY:** The Dorn family owns 78 acres south of Meffert Road on the far western edge of the Town. The land is zoned County A-1 Exclusive with 38 acres being in the Waunakee ETZ along Meffert Road and the other 40 acres south being in the Middleton ETZ. They are requesting to split off the farm house and buildings along Meffert Road, about 3 acres, which could then be zoned to accommodate the buildings and home (either A-1 or CR-5ac). This land is in the Rural Preservation District in our Comp. Plan. This split and rezone is completely consistent with our Plan and previous actions. We would need to include an additional 7 foot of roadway for Meffert Road as with similar splits, restrict the remainder to no further land division or creation of building sites, again consistent with past actions, and the other usual Town conditions and restrictions for similar splits and rezones. With the road dedication element we have to consider that one of the buildings may be too close to the road right of way, so staff will need to look at that for your future action.

**STAFF RECOMMENDATION:** Keep in mind this is only a consult so no action is to be taken, but the owners should know of any issues.

**RECOMMENDED MOTION:** None

**ATTACHMENT(S):** Letter from applicant.

Mary J. Nonn  
6078 Ford Drive  
Mazomanie, WI 53560



Re: Donna Dorn

To Whom it May concern

We are wanting to sell an area of approximately 3.3 acres of property that would include the house and all the buildings. The interested party is my daughter Catherine Nonn (granddaughter to Al and Donna Dorn). Our wish is to keep this part in the family as it has been for over 150 years.

If there are any further questions or concerns, please contact me at this email address.

Sincerely,

Mary J. Nonn  
POA of Donna Dorn



*CERTIFIED SURVEY MAP*

**WILLIAMSON SURVEYING AND ASSOCIATES, LLC**

NOA T. PRIEVE & CHRIS W. ADAMS, PROFESSIONAL LAND SURVEYORS  
104 A WEST MAIN STREET, WAUNAKEE, WISCONSIN, 53597 PHONE: 608-255-5705

Located in the Northwest 1/4 of the Northwest 1/4 of Section 19,  
T8N, R9E, Town of Westport, Dane County, Wisconsin.

N 1/4 CORNER  
SECTION 19-8-9  
FD. ALUMINUM  
MONUMENT

CURVE TABLE					
CURVE	RADIUS	CHORD BEARING	CHORD	ARC	DELTA
C-1	429.14'	N 79°19'14" E	188.17'	189.71'	25°19'46"

**NOTES:**

1.) THIS SURVEY WAS PREPARED WITHOUT BENEFIT OF A TITLE REPORT FOR THE SUBJECT TRACT OR ADJOINERS AND IS THEREFORE SUBJECT TO ANY EASEMENTS, AGREEMENTS, RESTRICTIONS AND STATEMENT OF FACTS REVEALED BY EXAMINATION OF SUCH DOCUMENTS.

2.) WETLANDS AND FLOOD PLAIN, IF PRESENT, HAVE NOT BEEN DELINEATED OR SHOWN.

LOT 1 AREA

INCLUDING R/W  
149,789 SQ. FT.  
3.44 ACRES

EXCLUDING R/W  
13,337 SQ. FT.  
3.06 ACRES



WCCS-DANE COUNTY

BEARINGS ARE REFERENCED TO THE NORTH  
LINE OF THE NW 1/4 OF SECTION 19-8-9  
LINE TO BEAR S 89°32'42" E

SCALE 1" = 100'



**PREPARED FOR:**

DONNA DORN  
P.O. BOX 188  
WAUNAKEE, WI 53597

**LEGEND**


- = SET 3/4"x24" REBAR  
WT 1.5 LB PER LIN FT
- = FOUND 1" PIPE
- ⦿ = FOUND 3/4" REBAR
- ⊕ = FOUND DANE COUNTY  
SECTION CORNER (AS NOTED)

DOCUMENT NO. \_\_\_\_\_

CERTIFIED SURVEY MAP NO. \_\_\_\_\_

***SURVEYORS SEAL***

19W-239



CERTIFIED SURVEY MAP

WILLIAMSON SURVEYING AND ASSOCIATES, LLC

NOA T. PRIEVE & CHRIS W. ADAMS, PROFESSIONAL LAND SURVEYORS

104 A WEST MAIN STREET, WAUNAKEE, WISCONSIN, 53597 PHONE: 608-255-5705

Located in the Northwest 1/4 of the Northwest 1/4 of Section 19,  
T8N, R9E, Town of Westport, Dane County, Wisconsin.

**SURVEYOR'S CERTIFICATE**

I, Noa T. Prieve, Professional Land Surveyor hereby certify that this survey is correct to the best of the professional surveyor's knowledge and belief and is in full compliance with the provisions of Chapter A-E 7 and Chapter 236.34 Wisconsin Statutes, the subdivision regulations of the Town of Westport, and by the direction of the owners listed below, I have surveyed, divided, and mapped a correct representation of the exterior boundaries of the land surveyed and the division of that land, located in part the Northwest 1/4 of the Northwest 1/4 of Section 19, T8N, R9E, Town of Westport, Dane County, Wisconsin., more particularly described as follows:

Commencing at the Northwest corner of said Section 19; thence S 89°32'42" E along the North line of the said Northwest 1/4, 233.28 feet to the point of beginning.

Thence continue S 89°32'42" E along the said North line of the Northwest 1/4, 771.39 feet; thence S 65°57'31" W, 310.86 feet; thence S 12°08'24" W, 150.93 feet; thence S 89°58'53" W, 411.30 feet; thence N 27°13'13" W, 97.44 feet; thence N 0°02'32" E, 193.80 feet to the point of beginning. This parcel contains 149,789 sq. ft. or 3.44 acres and is subject to a road right-of-way over the Northerly side thereof.

Williamson Surveying and Associates, LLC  
by Noa T. Prieve & Chris W. Adams

Date\_\_\_\_\_

Noa T. Prieve S-2499  
Professional Land Surveyor

**OWNERS' CERTIFICATE:**

As owner, I hereby certify that I caused the land described on this certified survey map to be surveyed, divided and dedicated and mapped as represented on the certified survey map. I also certify that this certified survey map is to be submitted to the Town of Westport and the Village of Waunakee for approval.

WITNESS the hand seal of said owners this \_\_\_\_\_day of\_\_\_\_\_,20\_\_\_\_.

STATE OF WISCONSIN)  
DANE COUNTY)

Donna G. Dorn

Personally came before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ the above named Donna G. Dorn to me known to be the person who executed the foregoing instrument and acknowledge the same.

\_\_\_\_\_County, Wisconsin.

Notary Public

My commission expires \_\_\_\_\_

Print Name

**TOWN BOARD RESOLUTION**

Resolved that this certified survey map and road right of way dedication is hereby acknowledged and approved by the Town of Westport on this \_\_\_\_\_day of \_\_\_\_\_, 20\_\_\_\_.

Thomas Wilson – Town Clerk

**VILLAGE OF WAUNAKEE APPROVAL**

Resolved that this certified survey map in the Town of Westport is hereby acknowledged and approved by the Village of Waunakee on this \_\_\_\_\_day of \_\_\_\_\_, 20\_\_\_\_.

Caitlin Stene – Village Clerk

**REGISTER OF DEEDS:**

Received for recording this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ at \_\_\_\_ o'clock \_\_\_\_M. and recorded in Volume \_\_\_\_\_ of Dane County Certified Surveys on pages \_\_\_\_\_ through \_\_\_\_\_.

Kristi Chlebowski  
Register of Deeds

DOCUMENT NO. \_\_\_\_\_

CERTIFIED SURVEY MAP NO. \_\_\_\_\_

Sheet 2 of 2

**SURVEYORS SEAL**

19W-239

7 of 52

**Tracy Meinholz**

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**From:** Robert Anderson <banderson@townofwestport.org>  
**Sent:** August 14, 2019 12:45 PM  
**To:** chris williamsonsurveying.com; Tom Wilson; maryjnonn@gmail.com  
**Cc:** Jessica Frey; Tracy Meinholz; Kevin Even  
**Subject:** RE: Dorn CSM Meffert St

HI,

This will require a rezone and we cant schedule the public hearing until October at the earliest so we should plan for a consult in September.

Please keep in mind the Town normally requires an extra 7' of ROW dedication and as I am reading your map the barn will then be in the ROW which cant happen. Your client may want to consider if they will be tearing the structure down to avoid conflicts with the setbacks from ROW as it may be a concern to approve and grandfather a structure that close to or possibly in the ROW.

We will also be looking to replicate or create something similar to the restrictions as shown on the CSM for the Dorn property north of Meffert Road so you can add them to the CSM for review and consideration.

Just send a cover letter from the owners asking for consideration along with the prelim CSM and we will schedule it for a Town PC consult on September 9<sup>th</sup> and JPC on the 10<sup>th</sup>.

Bob

Robert Anderson, WCPC CMC  
Utility, Finance, I.S. Manager, Deputy Clerk/Treasurer  
Town of Westport  
5387 Mary Lake Rd  
Waunakee, WI 53597  
608-849-4372

*All e-mail sent to the Town of Westport is subject to the Wisconsin open records law*

IF THIS MESSAGE IS TO THE ENTIRE MEMBERSHIP OF A GOVERNMENTAL BODY, you are advised that this email should be treated as a one-way communication and that responses "to all" should be avoided because those responses could create a "walking quorum" of the body in violation of the open meetings law (Office of the Wisconsin Attorney General Letter of 3/19/2010)

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**From:** chris williamsonsurveying.com [<mailto:chris@williamsonsurveying.com>]  
**Sent:** Wednesday, August 14, 2019 11:51 AM  
**To:** Robert Anderson; Tom Wilson; [maryjnonn@gmail.com](mailto:maryjnonn@gmail.com)  
**Cc:** Jessica Frey; Tracy Meinholz; Kevin and Leslie Even - Waunakee ([kevin@waunakee.com](mailto:kevin@waunakee.com))  
**Subject:** Dorn CSM Meffert St

Hello all,

Attached is the preliminary version of a 1 lot CSM for the Dorn family on Meffert Road. Mary's daughter is looking to purchase this lot from the family for her home, so we are simply looking to separate the farm buildings from the agricultural lands.

At this time, I am trying to get the ball rolling for this review and approval. Please let me know if you feel we need an initial consult meeting set up for this or if because it is so simply, we could submit a full application to move forward. if we can move forward, I will get all the applications, copies and checks to both the town and village, but if the consult is required please let me know if there is anything else you need to get that started.

Also, please verify the meeting dates for this once the process is determined.

Thanks

*Chris Adams*

Member & Professional Land Surveyor  
Williamson Surveying and Assoc. LLC  
104 A W. Main St  
Waunakee, WI 53597  
608-255-5705

[Williamsonsurveying.com](http://Williamsonsurveying.com)



***WAUNAKEE/WESTPORT JOINT PLAN COMMISSION SUMMARY SHEET***

**MEETING DATE:** 09/10/2019

**ITEM:** PRESENTATION

**TITLE:** Update on Housing Task Force Study

**ISSUE SUMMARY:** This document was presented to the Waunakee Plan Commission on August 12, 2019.

**STAFF RECOMMENDATION:** None

**RECOMMENDED MOTION:** None

**ATTACHMENT(S):** Housing Task Force Study



# Waunakee Housing Task Force Summary Report 2019

29 July 2019

Prepared by  
Kristin Runge, Ph.D.  
Division of Extension  
University of Wisconsin-Madison



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# Executive Summary

This report is the product of the Waunakee Housing Task Force. From September 2018 through July 2019 Task Force members met monthly to review Village-specific data relevant to housing as researched and presented by the faculty and staff of the University of Wisconsin-Madison, along with several contributors from the greater Madison area.

The Dane County region is projected to grow by 20,000 households between now and 2040. Against this background, and after reviewing data, the Task Force has noted:

- Substantially higher median household incomes over the past 20 years after adjusting for inflation.
- A decrease in the proportion of resident households earning 80% to 100% of area median income.
- Data indicating that four out of five individuals working in the Village commute from other locations, alongside survey results indicating that housing within the Village is not within the budgets of most commuters.
- An increase in the number of retirees in the Village, alongside a decrease in retiree household incomes.

In arriving at the recommendations, the Housing Task Force operated under the following principles:

- Housing should accommodate workforce needs.
- People who work in the Village should be able to live in the Village.
- Housing strategies should address the needs of those who are currently underserved in the Village housing market.

The Housing Task Force also articulated a set of community concerns to guide their recommendations:

- Maintain the tax base.
- Maintain the quality of schools.
- Maintain community character.

After several months of deliberation, the Housing Task Force articulated 12 recommendations supported by Village-specific data, consistent with the principles outlined above, and in line with the results of the resident and commuter surveys. Listed at the conclusion of this report, this report and its recommendations are offered for the use of the Village of Waunakee Plan Commission and the Village of Waunakee Board of Trustees.

## Housing Task Force Members

Tiffanie Clark	Patrick Maly	Ashley Sliter
Nila Frye	Robert McPherson	Jeffrey Tews
Mary Heimbecker	Michelle Nell	Susan Vergeront
Sam Kaufman	Maria Patt	Karen von Huene
Mary Ellen Kearney	Hannah Russell	Tom Wilson
Adam Kreitzman	Ellen Schaaf	Chris Zellner

## Presenters & Contributors

Steve Deller, Ph.D. Division of Extension Department of Agricultural & Applied Economics University of Wisconsin-Madison	Kurt Paulsen, Ph.D. Department of Planning & Landscape Architecture University of Wisconsin-Madison
Matt Kures, M.S. EDA University Center for Economic Development Division of Extension University of Wisconsin-Madison	Greg Rosenberg, Principal Rosenberg & Associates Co-founder, National Community Land Trust Network
Tom Landgraf Wisconsin School of Business University of Wisconsin-Madison Principal, Dimension Development	Anne Reynolds Center for Cooperatives University of Wisconsin-Madison
Dave Marcouiller, Ph.D. Department of Planning & Landscape Architecture University of Wisconsin-Madison	Dan Veroff, M.S. Applied Population Laboratory University of Wisconsin-Madison

## Facilitators

Sharon Lezberg, Ph.D. Dane County Community Development Division of Extension University of Wisconsin-Madison	Kristin Runge, Ph.D. EDA University Center for Economic Development Division of Extension University of Wisconsin-Madison
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# Task Force Formation & Charge

## Problem Statement

In June 2018 the Village of Waunakee (pop. 13,607) sought to evaluate the existing housing mix by understanding community, economic and social needs – both at that time and predicted in the future. As part of the evaluation, the Village hoped to determine the need for housing options that appropriately fit the definition of “affordable.” However, and understandably, the definition for “affordable” in relation to the economic conditions in Waunakee needed clarification. Other population housing needs, such as senior housing, also needed evaluation.

Once those needs were understood, the Village looked to evaluate current ordinances and policies. One such item was a restriction which requires that new developments not contain more than 25 percent attached units, with an exemption for senior housing projects and redevelopment (see page 36). The Village also sought to evaluate the best possible geographical locations for the various styles and types of housing alternatives.

## Proposal

The original proposal recognized that there is an ***immediate need*** for information related to a ***longer-term issue*** presented by Waunakee’s location within a growing Dane County region. As a community with a well-funded and highly rated school district, land available for development, and a location adjacent to a major regional employment center, Waunakee is likely to experience continued pressure for housing in the near future. The goal of the program reported here was to ***build the capacity*** of Village of Waunakee staff, elected/appointed officials and community members ***using village-specific data*** in combination with ***expert insights from University of Wisconsin*** faculty and staff with experience in issues similar to those faced by this community.

Using a study group model for civic participation, the Waunakee Village Board and the University of Wisconsin Extension formed a task force to review Village of Waunakee-specific information. Potential members were asked to apply for a seat on the Task Force. In order to ensure the Task Force was representative of the community, one member from each voting ward was selected. Additionally, members were selected in order to ensure gender balance, and diversity in income, education, age and background. In addition to one voting member from each ward, two youth representatives from Waunakee Community High School were selected.

## Charge to the Task Force

The Village Board created the Waunakee Housing Task Force to gain a full understanding of the existing housing inventory in Waunakee, identify areas of realistic housing need in which the Waunakee housing marketplace ought to provide supply, and craft potential policy modifications for consideration by the Plan Commission to address the identified needs.

# Regional Growth & Waunakee

## Dane County to Add More than 20,000 Households by 2040

In recent years, Dane County has led the State of Wisconsin in population growth, accounting for a quarter of the state’s population increase in 2018 alone. The county population has grown from 426,526 in 2000, to an estimated 542,364 in 2018. Over that same period, Waunakee’s population has grown from 9,061 residents to an estimated 13,284 residents.

Narrowing the time period to 2010 through 2018, Dane County’s population growth rate of 1.18%, was outpaced by Waunakee’s annual population growth rate of 1.56%. Unlike the larger region, Waunakee’s population growth was matched by housing growth (Table 1). Using U.S. Census estimates of 2.75 people per household, the equivalent of 628 households were added to Waunakee from 2000 to 2017. Over the same time period, Waunakee added 621 new housing units for a nearly complete 1:1 new household to new housing unit match. Over a slightly longer period, 2006 through 2017, Dane County added approximately 1 housing unit for every 1.44 new households, leading to an under-supply of housing in the county.

Table 1. Population Growth 2000 - 2018			
	Dane County Population	Waunakee Population	Housing Units in Waunakee
2000	426,526	9,061	1,859
2010	488,073	11,557	2,970
2018	542,364	13,284	3,591
Using 2000, 2010 U.S. Census and 2017 American Community Survey data. One household=2.75 persons per Census guidelines. Housing units in Waunakee provided by Village of Waunakee			

Growth in the Dane County region is predicted to continue unabated. The Wisconsin Department of Administration population projections, completed in 2015, estimated Dane County at 606,620 residents by 2040. In practical terms, this equals an additional 64,256 county residents organized into 23,364 households based on 2018 population estimates from the U.S. Census. Based on this, and expecting a continued under-production in housing units across the state, Waunakee and other Dane County communities will continue to feel housing pressure.

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## Implications for Housing

- All communities in the Dane County region will continue to experience pressure for increased housing if growth continues as projected.

## Implications for Broader Community Development

- Consumer demand for retail, restaurant and other amenities will grow along with population increases.
- School districts in communities close to job centers will likely see increases in enrollment as a result of overall population increases.
- The need for stronger regional transit strategies may become more apparent as population increases continue.
- Increases in the number of skilled and/or educated potential employees will likely attract additional employers.

# Resident Population Profile

**Table 2.** Waunakee resident population profile by income

INCOME AND BENEFITS	2000		2017	
	Estimate	Percent	Estimate	Percent
<i>Total households</i>	<i>3,216</i>	<i>100%</i>	<i>4,801</i>	<i>100%</i>
Less than \$10,000	79 <sup>1</sup>	2.50%	109	2.30%
\$10,000 to \$14,999	34 <sup>1</sup>	1.10%	122	2.50%
\$15,000 to \$24,999	248 <sup>1</sup>	7.70%	240	5.00%
\$25,000 to \$34,999	301 <sup>1</sup>	9.40%	171	3.60%
\$35,000 to \$49,999	526 <sup>1</sup>	16.40%	541	11.30%
\$50,000 to \$74,999	906 <sup>1</sup>	28.20%	685	14.30%
\$75,000 to \$99,999	580 <sup>1</sup>	18.00%	573	11.90%
\$100,000 to \$149,999	366 <sup>1</sup>	11.40%	1,020	21.20%
\$150,000 to \$199,999	111 <sup>1</sup>	3.50%	873	18.20%
\$200,000 or more	65 <sup>1</sup>	2.00%	467	9.70%
Median household income (dollars)	\$85,202 <sup>2</sup>	(X)	\$98,224 <sup>3</sup>	(X)
Mean household income (dollars)	\$96,291 <sup>2</sup>	(X)	\$114,284 <sup>4</sup>	(X)
Median family income (dollars)	\$97,673 <sup>2</sup>	(X)	\$123,310 <sup>4</sup>	(X)
Median non-family income (dollars)	(X)	(X)	\$43,829 <sup>5</sup>	(X)

<sup>1</sup>This number not adjusted for inflation; ; <sup>2</sup>dollar amounts adjusted for inflation, pre-adjustment=\$59,225 median household, \$66,933 mean household, \$67,894 median family; Calculations via Bureau of Labor Statistic CPI Inflation Calculator comparing January 2000 and January 2017 <sup>3</sup>Estimate 4,801 total households;

<sup>4</sup>Based on estimate 3,561 family households; <sup>5</sup>Based on estimate 1,240 non-family households;

*Data collected from 2017 American Community Survey, United States Census*

## The Missing Middle: As Median and Mean Household Incomes Increased, the Proportion of Households Earning 80 to 100% of Area Median Income Decreased

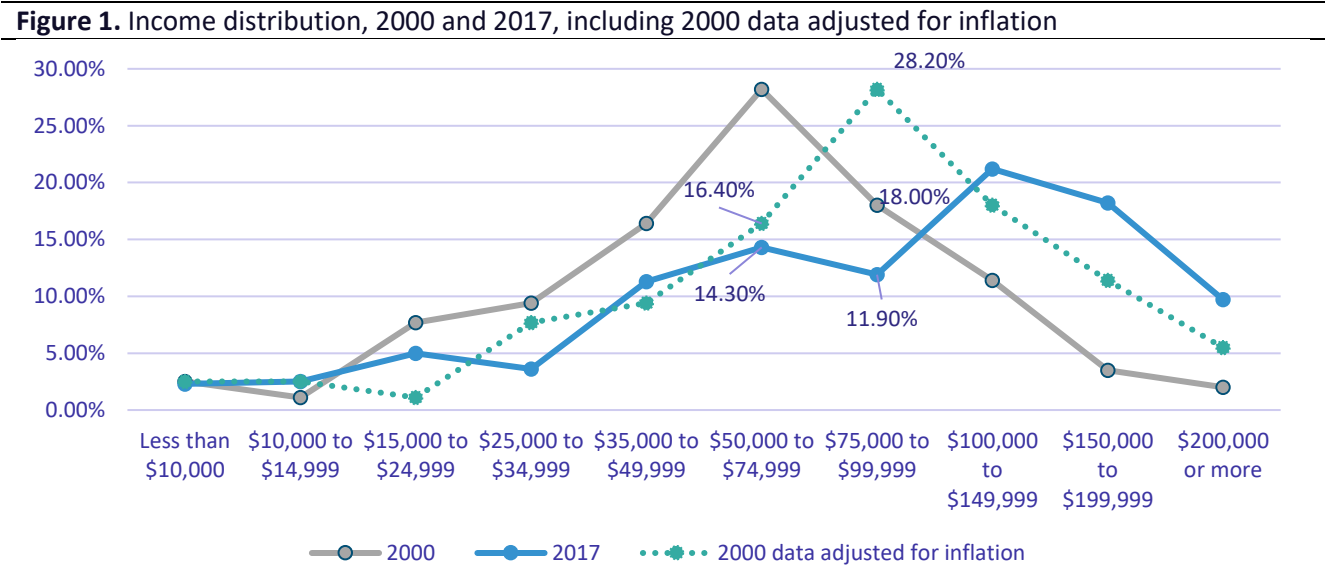
After accounting for inflation, median household income increased by 15.3% between 2000 and 2017 and mean (average) household income increased by 18.7%. Family households fared better than non-family households, with median income increasing by 26.2%, from \$97,673 to \$123,310, between 2000 and 2017, after adjusting for inflation (Table 2).

One significant change in the composition of Waunakee resident household incomes is the sharp decrease in households earning 80 – 100% of area median income<sup>1</sup>. In 2000, roughly 28% of Waunakee households (906 total) reported incomes between 80 and 100% of median income; by 2017 that number shrank to roughly 12% (571 total). Figure 1 illustrates this shift. Specifically, in 2000 the income distribution in Waunakee was

<sup>1</sup> Unless otherwise specified, area median (AMI) income refers to the median income of all households in Waunakee. 80% of AMI is calculated by AMI\*0.80

relatively symmetrical. By 2017, the distribution of incomes had shifted (Figure 1). Comparing the 2017 data to the 2000 data after adjusting for inflation, there are clear increases in households reporting incomes at the higher end (\$100,000 and above), a small decrease in the proportion reporting incomes \$50,000 to \$74,999, and a relatively large decrease in the proportion reporting incomes \$75,000 to \$99,999. If Waunakee’s population had grown proportionally by income levels, roughly 28% of Village households in 2020 would earn between \$75,000 and \$99,999 (Figure 1). Instead, this income segment fell to 11.9% of all Village households by 2017. This segment, along with the segment earning \$50,000 to \$74,999 – which declined from 16.4% to 14.3% during the same time period – represent the “missing middle.”

The change is likely a result of attracting residents with higher incomes in combination with advancing incomes for some existing resident households, but without simultaneously replacing households at middle-income levels. After adjusting for inflation, between 2000 and 2017 the proportion of Waunakee households reporting annual incomes greater than \$100,000 grew by 14.2%. In detail, there was an increase of 3.2% in the number of households reporting incomes between \$100,000 and \$149,999, an increase of 6.8% in the number of households reporting incomes between \$150,000 and \$199,99 and an increase of 4.2% in the number of households reporting incomes of \$200,000 or more.



Note: An increase of 2.09% annually, or 42.15% overall, is assumed based on Bureau of Labor Statistics CPI Inflation Calculator

Figure 2 depicts a corrected income distribution. Several assumptions were used for this projection. First, it was assumed that a certain proportion of the 28.2% of the population earning 80-100% of area median income in 2000 would increase their household earnings and move into the upper-income categories, thus reducing this peak. Second, it was assumed that the current median household income of \$98,224, as estimated by the U.S. Census, would not change in the correction. Third, it was assumed that a corrected distribution would not reduce the overall number of households in each income category. Therefore, the correction adds households

rather than redistributes households. A total of 216 middle-income households, defined as those earning 80-100% of area median income (\$78,579 to \$98,224), would need to be added in order to fill the missing middle gap. In practical numbers, this would mean that 646 middle income households earning 80-100% of area median income should be in Waunakee, instead of the current number of 430.

**Figure 2.** 2017 income distribution corrected to reflect larger proportion of middle incomes

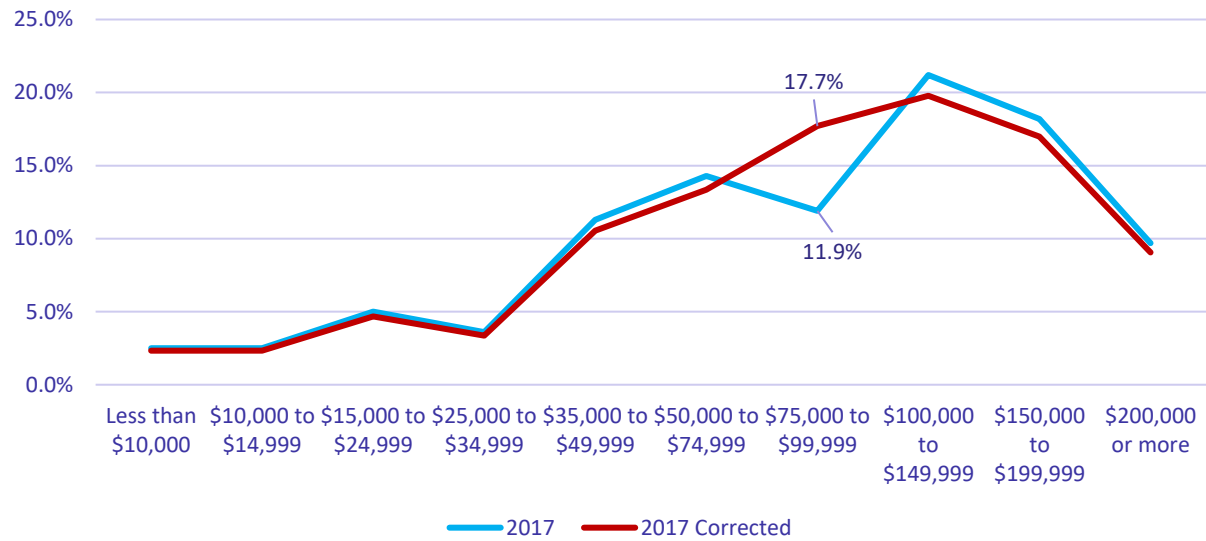


Table 3 provides sample occupational combinations using jobs available in the Madison regional employment area that would fit the household income profile of missing middle households. Wages are based on average annual wages in Wisconsin for these occupations, according to Bureau of Labor Statistics.

TABLE 3. Hypothetical “Missing Middle” occupation and wage combinations by annual household earnings based on Bureau of Labor Statistics average annual salaries for Wisconsin			
Occupation	Average Annual Wage	Occupation	Average Annual Wage
Firefighter	\$40,310	Graphic Designer	\$47,890
Family Therapist	\$51,070	Industrial Engineer	\$51,190
Household Total	\$91,380	Household Total	\$99,080
Commercial Pilot	\$80,520	Middle School Teacher	\$46,840
Stay at Home Spouse	\$0	Kindergarten Teacher	\$44,310
Household Total	\$80,520	Household Total	\$91,120
Production Supervisor	\$61,020	Social Worker	\$48,440
Hairstylist	\$28,970	Nursing Assistant	\$27,470
Household Total	\$89,990	Household Total	\$75,910
Via Bureau of Labor Statistics <a href="https://www.bls.gov/oes/current/oes_wi.htm#21-0000">https://www.bls.gov/oes/current/oes_wi.htm#21-0000</a>			

## Retirement Incomes Decrease even as Proportion of Retirees Grow

Between 2000 and 2017, the proportion of Waunakee residents receiving social security income and retirement income increased to one in four from one in five. Although social security income increased slightly over this time period, the inflation-adjusted amount of retirement income decreased substantially, from an average of \$42,024 in 2000 to \$30,369 in 2017. In 2000, a retiree household receiving both the average social security income and average retirement income would have reported a household income of \$60,206, in inflation-adjusted dollars. In 2017, that same household would have reported an income of \$51,074, or \$8,502 less than in 2000 after adjusting for inflation.

## Proportion of Households Receiving Assistance Remains Relatively Unchanged but Public Assistance Incomes Decrease Significantly

The number of households receiving cash assistance increased from 45 to 73 between 2000 and 2017, but the overall proportion -- 1.40% and 1.50%, respectively -- remained largely unchanged (Table 4). However, households receiving assistance in 2017 received substantially less than in 2000. Using inflation-adjusted dollars, the typical household receiving cash assistance in 2017 received \$2,899 less than in 2000, and the typical household receiving supplemental security income in 2017 received \$598 less than in 2000. In addition to cash assistance, 292 households, or 6.10%, received SNAP benefits in 2017.

**Table 4.** Waunakee residents receiving social security income or other public assistance

Income and Benefits	2000		2017	
	Estimate	Percent	Estimate	Percent
Total households with earnings	2,795	86.9%	3,956	82.40%
Mean earnings (dollars)	\$97,673 <sup>1</sup>	(X)	\$116,547	(X)
With Social Security	585	18.20%	1,214	25.30%
Mean Social Security income (dollars)	\$18,182 <sup>1</sup>	(X)	\$20,705	(X)
With retirement income	413	12.8%	952	19.80%
Mean retirement income (dollars)	\$42,024 <sup>1</sup>	(X)	\$30,369	(X)
With Supplemental Security Income	39	1.2%	187	3.90%
Mean Supplemental Security Income (dollars)	\$10,310	(X)	\$9,712	(X)
With cash public assistance income	45	1.40%	73	1.50%
Mean cash public assistance income (dollars)	\$4,491 <sup>1</sup>	(X)	\$1,592	(X)
With Food Stamp/SNAP benefits in past 12 months	NA	NA	292	6.10%

<sup>1</sup>Dollar amounts adjusted for inflation, pre-inflation adjusted mean social security income = \$12,639, retirement income = \$28,337 supplemental social security income = \$7,167, mean cash assistance = \$3,122 Data collected from 2017 American Community Survey, United States Census

## Implications for Housing

- An overall decrease in the proportion of residents earning 80 to 100% of area median income likely indicates a need for increasing the availability and/or accessibility of housing stock targeting households earning 80% to 100% of area median income, or those households earning between \$78,579 and \$98,224 annually.
- An increase in the number of retirees concurrent with a decrease in average retirement income could indicate a need for income-targeted retirement housing.
- The increase in the number of households receiving supplemental security income could indicate a need for supportive housing or a community-based residential facility for adults with disabilities. The Village should consider an assessment of this need at some point in the future.

## Implications for Broader Community Development

- The increase in population, accompanied by an increase in median and mean incomes, indicates an increase in demand for all services in the village, notably retail and restaurant.
- Recognizing that cash assistance has been reduced, the Village should continue working with Waunakee Neighborhood Connection and other social agencies to support households on assistance.
- The increase in the number of households receiving social security could indicate the need for services designed to allow seniors to remain in their homes, i.e. lawn care, maintenance, in-home health care and/or adult daycare, among other services.

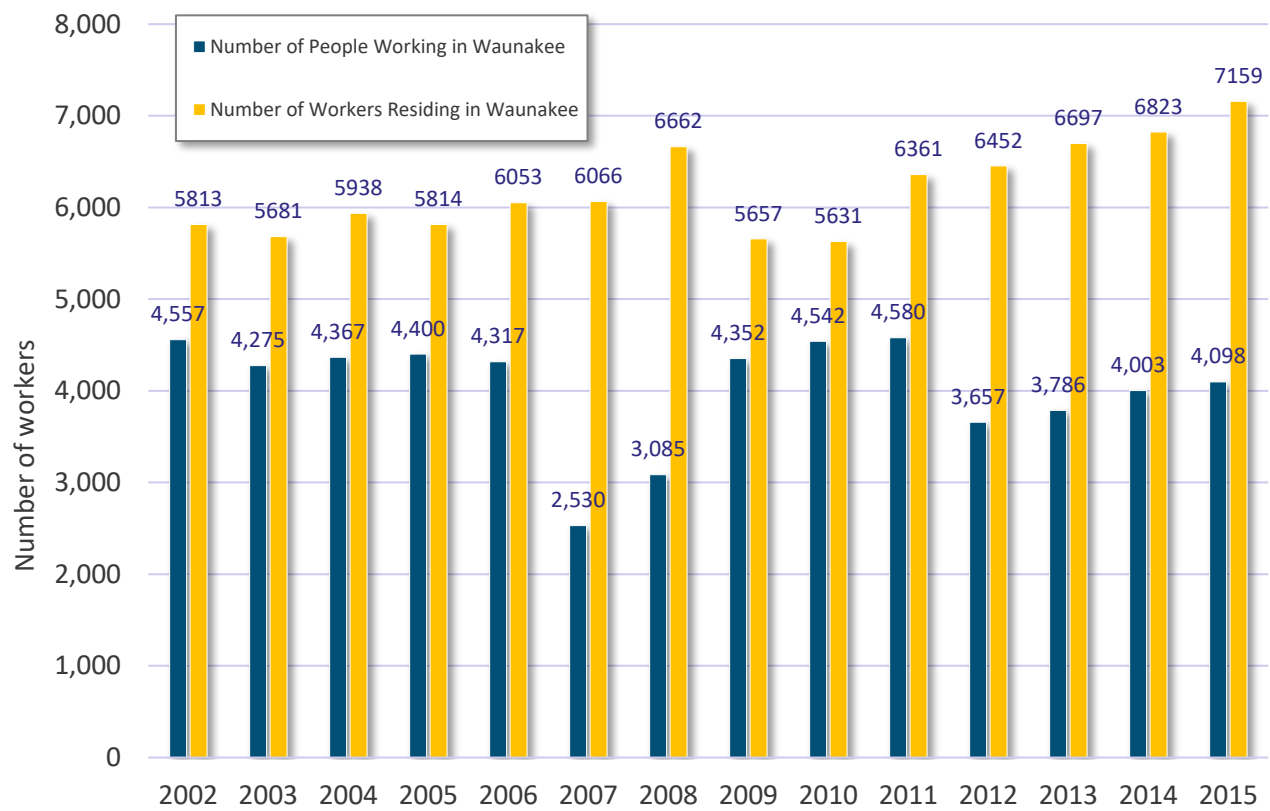
# Commuter Profile

## A History of More Out-Commuters than In-Commuters

The demand for housing near job centers likely drives much of the regional demand for housing, with Waunakee, DeForest, Cottage Grove and other suburbs of Madison benefitting from the healthy regional job market. Waunakee’s geographic location near job centers and transportation routes is, in part, what makes the community an attractive home base for those employed in the region.

As with many small communities near large job centers, Waunakee has more employed residents than jobs (Figure 3). This trend is not likely to change. In 2002, and at the start of the period depicted in Figure 2, Waunakee had 1.27 residents for each job, rising to 2.39 residents per job on the eve of the Great Recession in 2007, and settling around 1.75 residents for each job from 2012 through 2015.

**Figure 3.** Commuters to and from the Village of Waunakee, 2002 through 2015



Source: U.S. Census OnTheMap LODS data

## Where Village Residents Work and Waunakee Employees Live

In total, Waunakee supplies 7,159 employees to the region (Table 5). About 10.9%, or 781, of employed Waunakee residents both work and live in the Village. Including that group, 81.7% of all employed Waunakee residents work in Dane County. Milwaukee County and Waukesha County are the most popular commuting destinations for Waunakee residents, claiming 3.0% and 1.9%, respectively, of employed Village residents.

**Table 5. Worker Flow by Village, Town or City in 2015**

Place of Residence for Waunakee Employees (n=4,098)			Place of Employment for Waunakee Residents (n=7,159)		
	Count	Share		Count	Share
Waunakee Village	781	19.1%	Madison City	3,094	43.2%
Madison City	746	18.2%	Waunakee Village	781	10.9%
Sun Prairie City	187	4.6%	Middleton City	537	7.5%
DeForest Village	132	3.2%	Westport Town	355	5.0%
Windsor Village	113	2.8%	Sun Prairie City	161	2.2%
Middleton City	111	2.7%	DeForest Village	121	1.7%
Westport Town	107	2.6%	Milwaukee City	121	1.7%
Fitchburg City	49	1.2%	Madison Town	119	1.7%
Springfield Town	498	1.2%	Fitchburg City	106	1.5%
Lodi Town	43	1.0%	Monona City	85	1.2%
All Other Locations	1,780	43.4%	All Other Locations	1,679	23.5%

Data: US Census Bureau OnTheMap LODS Data

Looking at the most recent data (2015), among the 4,098 employees working in Waunakee, 19.1% live in the Village and 18.2% reside in the City of Madison (Table 6). Including those who live in Waunakee and Madison, a total of 70.2% of those working in Waunakee live in Dane County. Another 6.6% of those employed in Waunakee commute from Columbia County, and 3.5% commute from Sauk County.

**Table 6. Worker Flow by County in 2015**

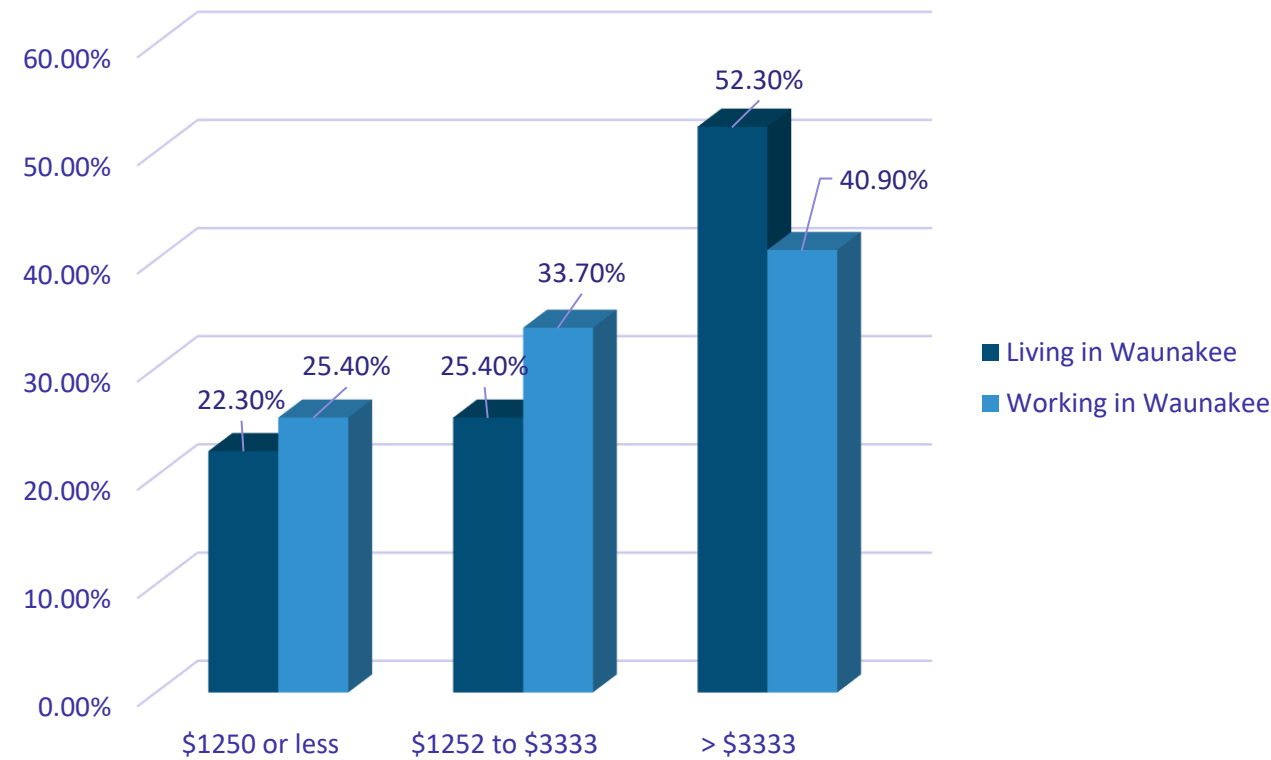
Place of Residence for Waunakee Employees (n=4,098)			Place of Employment for Waunakee Residents (n=7,159)		
	Count	Share		Count	Share
Dane County	2,878	70.2%	Dane County	5,848	81.7%
Columbia County	272	6.6%	Milwaukee County	215	3.0%
Sauk County	144	3.5%	Waukesha County	139	1.9%
Rock County	56	1.4%	Columbia County	136	1.9%
Milwaukee County	56	1.4%	Sauk County	125	1.7%
Dodge County	49	1.2%	Rock County	69	1.0%
Walworth County	43	1.0%	Outagamie County	44	0.6%
Green County	42	1.0%	Brown County	35	0.5%
Iowa County	40	1.0%	Jefferson County	35	0.5%
Waukesha County	38	0.9%	Winnebago County	34	0.5%
All Other Locations	1,780	43.4	All Other Locations	1,679	23.5%

Data: US Census Bureau OnTheMap LODS Data

Difference in Types of Jobs Held by Residents and Jobs Available in Village

A portion of the disparity between earnings for those who live in Waunakee, as compared to those who work in Waunakee, is related to the types of jobs more often held by Waunakee residents as compared to the types of jobs available in the Village (Figure 4). Two of the top three categories of jobs available in Waunakee are in skilled trades, specifically manufacturing (22.60% of employment; median hourly wage= \$17.64 average annual wage=\$38,940), construction (13.10% of employment; median hourly wage=\$24.47; average annual wage=\$53,870), and the third category is education (10.60% of employment; median hourly wage = \$22.35; average annual wage=\$50,950).

Figure 4. Monthly Earnings for Those Living in Waunakee and Those Working in Waunakee

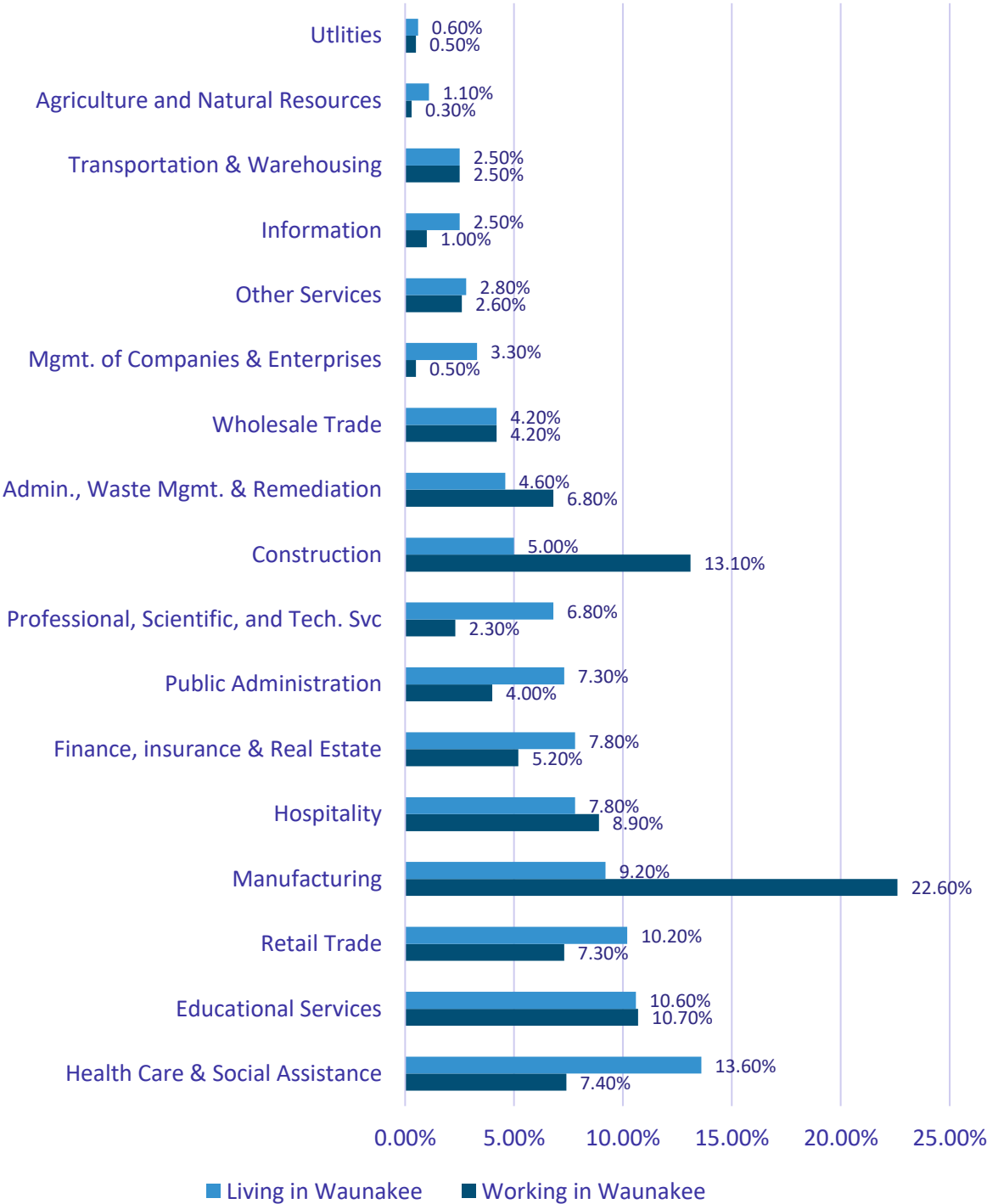


Data: US Census Bureau OnTheMap LODS Data

Looking at a comparable proportion of residents, the top three categories employing those living in the Village are health care (13.60% of employment; median hourly wage = \$38.25; average annual wage=\$79,560), education (10.60% of employment; median hourly wage = \$22.35; average annual wage=\$50,950) and retail (10.20% of employment; median hourly wage=\$13.47; average annual wage=\$40,560) (Figure 5).

In reconciling the numbers, it is worth noting a couple of things. The proportion of residents with a bachelor’s degree or higher likely indicates that Waunakee residents are more likely to be in management positions, even when employed in lower wage sectors (i.e. retail). However, that is not true of all residents. Although many may think of Waunakee as a well-to-do community, as reflected in higher median and mean household incomes, it is critical to note that 47.7% of those living in the Village earn \$3,333 a month or less.

**Figure 5.** Proportion of jobs available in Waunakee and jobs held by residents of Waunakee



## Village Insulated from Local Jobs Downturn, but Difficult Recruitment for Employees at Local Firms May Constrain Economic Development & Quality of Life

In total, roughly 89% of employed Waunakee residents commute outside the Village for work, and roughly 80% of those employed in Waunakee commute to the Village from other communities. There are positive and negative effects related to this phenomenon. On the positive side, there is no mathematical correlation between the number of jobs in Waunakee and the number of employed Village residents. The dispersion of Waunakee residents' employment across many firms in several communities has provided some insulation from a 'double whammy' of negative effects when a single, large, local employer shuts down or lays off large numbers of employees. We can see a clear example of this in the sharp drops in the number of workers employed in Waunakee from 2006 to 2007 and again from 2011 to 2012, which was not related to the overall number of employed residents in those years. This decline also differs from the sharp drop in employment among Waunakee residents occurring in 2008 to 2009/10, which was not related to the number of jobs available in the Village.

### **DIFFICULTY FILLING SERVICE INDUSTRY JOBS HAS THE POTENTIAL TO DIRECTLY AFFECT ECONOMIC DEVELOPMENT IN THE VILLAGE'S SERVICE AND RETAIL SECTOR, AND IMPACT THE QUALITY OF LIFE FOR RESIDENTS.**

On the negative side, the commuting pattern (Figure 3) in combination with the wages provided by jobs in the Village, as compared to wages commanded by residents in the Village (Figures 4, 5), likely indicates that local employers have limited ability to recruit employees from among Waunakee

residents. Recruitment for skilled or semi-skilled work at lower wages (i.e. certified nursing assistants, day care workers and restaurant or retail staff) may be particularly challenging for local employers, even if wages are competitive for those job categories. In addition to the general challenge of maintaining a full staff in a tight labor market, difficulty filling service industry jobs has the potential to directly affect economic development in the service and retail sectors, and by extension affect quality of life in the Village, as those necessary services may not be sufficiently available.

Difficulty in filling service industry jobs may also be exacerbated by the absence of public transit between suburban communities in the Madison area. The City of Madison supplies 18.1% of Waunakee's workforce, with another 13.3% supplied by nearby Middleton, Windsor, DeForest and Sun Prairie. It is possible that this proportion would be higher, and the pool of available employees greater, if there were reliable public transit routes between the communities.

## Implications for Housing

- Waunakee will likely continue to be an attractive community for those commuting within the greater Madison region.
- A lack of workforce housing options and public transit routes may be impacting local firm ability to recruit employees across all categories of employment.
- The combined effects of high housing costs and lack of public transit may be especially difficult for employers recruiting skilled and semi-skilled workers, such as daycares, nursing homes, restaurants and retail.
- The proportion of in-commuters working in construction, manufacturing and educational services within the Village are likely earning wages that qualify their households for middle income homeownership. Their absence as residents may be an indication that there is an under-supply of housing in this category.

## Implications for Broader Community Development

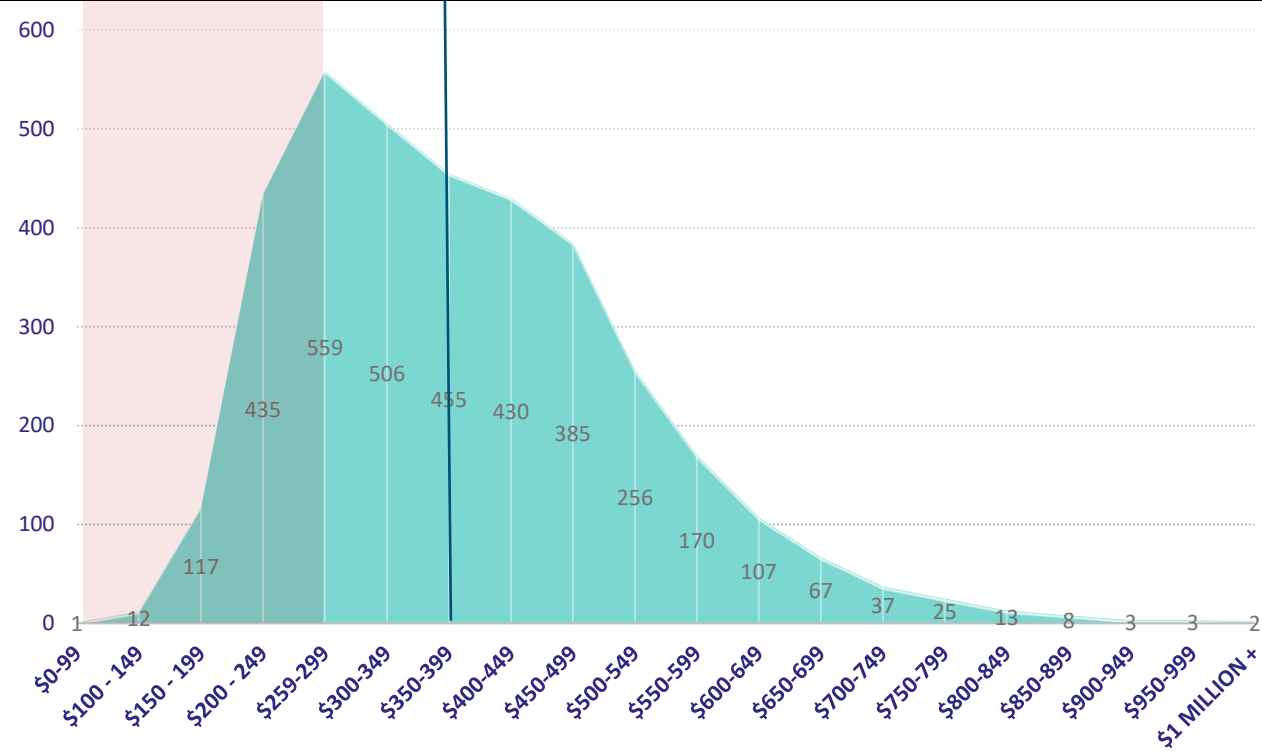
- In lieu of a publicly funded transit system that connects Madison and surrounding communities, local employers may want to consider starting a commuter van or collective to access a wider employee base.
- The large proportion of in-commuters represent an opportunity for service and retail in Waunakee. The Village and/or Chamber of Commerce may want to consider market research exploring this, or a strategy designed to serve these daytime residents.

# Housing Stock Inventory

## Owner Occupied Housing

Currently, there are 3,591 housing units in the Village of Waunakee (Figure 6). Median value falls between \$350,00 and \$399,999 (Village of Waunakee, 2019). In comparison, median value for all Dane County homes falls between \$250,000 and \$299,999 (Zillow, 2019). Approximately 3.6% of housing units in the Village have a fair market value of \$200,000 or less, 27.7% have a fair market value of \$200,00 to \$299,999; 26.8% have a fair market value of \$300,000 to \$399,999; 22.7% have a fair market value of \$400,00 to \$499,999; and 19.2% have a fair market value of \$500,000 or above (Figure 7).

**Figure 6.** Village of Waunakee home inventory by fair market value



Red shaded area indicates homes that meet affordability requirement for 80-100% of area median income for a family of four per HUD rules; Vertical blue line denotes median single-family home value; Data provided by Waunakee Village Hall, April 2019; Total single family housing units =3,591;

Table 7 includes cumulative percentages alongside the number of homes in each price category. Median value, for both assessed and fair market home values, fell between \$350,000 and \$399,900 in 2018.

TABLE 7. VALUE OF CURRENT WAUNAKEE HOUSING STOCK			
\$ RANGE	2018 Assessed Value	2018 Fair Market Value	Cumulative Percent
UNDER \$149,900	51	13	0.4%
\$150,000 - \$199,900	306	117	3.6%
\$200,000 - \$249,900	678	435	15.7%
\$250,000 - \$299,900	584	559	31.3%
\$300,000 - \$349,900	543	506	45.4%
\$350,000 - \$399,900	484	455	58.1%
\$400,000 - \$449,900	403	430	70.0%
\$450,000 - \$499,900	230	385	80.8%
\$500,000 - \$549,900	139	256	87.9%
\$550,000 - \$599,900	81	170	92.6%
\$600,000 - \$649,900	44	107	95.6%
\$650,000 - \$699,900	23	67	97.5%
\$700,000 - \$749,900	12	37	98.5%
\$750,000 - \$799,900	7	25	99.2%
\$800,000 - \$849,900	4	13	99.6%
\$850,000 - \$899,900	2	16	99.8%
TOTAL	3591	3591	100.0%
Data provided by Village of Waunakee			

Between 2000 and 2018, a total of 1,728 housing starts were recorded within Village limits (Table 7b). Between 2000 and 2009 an average of 103 homes were constructed each year. In comparison, an average of 78 homes have been constructed in each year from 2010 through 2018 (Table 8).

Table 8. Waunakee Housing Starts 2000-2018			
Year	Starts	Year	Starts
2000	88	2010	39
2001	109	2011	54
2002	94	2012	49
2003	124	2013	89
2004	165	2014	93
2005	137	2015	95
2006	95	2016	105
2007	96	2017	97
2008	58	2018	77
2009	64	Total	1,728
Data provided by Village of Waunakee			

## \$241,000 and \$308,000 are Important Owner-Occupied Price Points for Household of Four Earning 80%-100% of Area Median Income

The U.S. Department of Housing & Urban Development (HUD) provides guidelines for home affordability based on income and the number of household members. In 2018, HUD considered an upper limit of \$241,584 for a household of four earning 80% of area median income (\$78,579) or a household of two earning 100% of area median income (\$98,224). A house priced at \$308,112 would be considered affordable for a household of four earning 100% of area median income.

Village household incomes and housing prices are not evenly matched. About 31% of Waunakee homes have a fair market value equal to or less than \$300,000, which is slightly lower than the HUD limit for a household of four earning 100% of area median income. Among these, about 435 homes, or 15.7% of total, have a fair market value of \$250,000 or less, which is slightly higher than the HUD limit for a household of four earning 80% of area median income. The decrease in the proportion of Village households in the \$75,000 to \$99,999 income range is likely related to an under-supply of houses in these price ranges coming to market.

TABLE 9. HUD-ESTIMATED AFFORDABLE OWNERSHIP PRICE LEVELS, DANE COUNTY FY 2018					
	Persons in Household				
	1	2	3	4	5
120% of AMI	\$258,814	\$295,788	\$332,761	\$369,734	\$399,313
Median income limit (100% of AMI)	\$215,678	\$246,490	\$277,301	\$308,112	\$332,761
Low income limit (80% of AMI)	\$169,176	\$193,368	\$217,560	\$241,584	\$260,911
Very low income limit (50% of AMI)	\$107,856	\$123,312	\$138,768	\$154,056	\$166,380
Extremely low income limit (30% of AMI)	\$64,680	\$73,920	\$83,160	\$92,400	\$99,792

## Demand for Owner-Occupied Houses Priced for Median Income Likely Exceeds Supply

According to Zillow, a total of 651 homes were sold in Waunakee during the three-years prior to the draft of this report (June 24, 2016 through June 24, 2019). Of those, 153 housing units -- 77 condominiums/townhomes and 76 single family homes -- sold for \$250,000 or less. Another 104 units -- 7 condominiums/townhomes and 97 single family homes -- sold for \$251,000 to \$308,000 over the same period. In total, 257 homes sold at or below the \$308,112 guideline for a family of four making 100% of area median income. In comparison, 394 housing units -- 19 condominiums/townhomes and 375 single family homes -- sold for \$308,113 or greater during the same period.

Considering single family home sales only, and excluding condominiums or townhomes, the ratio of homes priced for median-income households (\$98,224 for a family of four) to those priced for greater-than-median income households was slightly more than 1:2 during this time. In other words, for every house priced to meet limits for a median income household, another two houses were priced above HUD limits for those households. Multi-family units provide some relief from this statistic. When including condominiums and townhomes, the ratio is reduced to one to 1.5 during the same period.

# Cost-burdened Households

One important consideration for housing costs is the burden of current prices on existing community residents. *Cost-burdened households* are those who pay more than 30% of their monthly income on housing. *Extremely cost-burdened households* are those that pay more than 50% of their monthly income on housing. Cost-burdened households cut back on basic needs, such as food, transportation and healthcare in order to cover housing costs. For this segment, the Task Force focused on addressing the existing needs of current Waunakee residents.

## Cost-burdened Owner Households

Among current Village households, 70 homeowner households with incomes below 30% of area median, 35 with incomes 30% to 50% of area median, and 85 with incomes 50% to 80% of area median -- 190 households in total -- are extremely cost-burdened<sup>1</sup>. Although it is difficult to predict the actions of any one household, it is reasonable that a portion of these home owning households would move to lower cost ownership options if such options were available within the Village.

## Cost-burdened Renter Households

Based on the latest data available, 175 renter households in Waunakee report incomes below 30% of area median income. A total of 70 rental units in the Village have rents that would be considered affordable for this segment, making a baseline shortfall of 105 total rental units. However, incomes and rents are not perfectly matched. Among these 175 renter households, 125 are considered extremely<sup>2</sup> cost-burdened. An additional 20 current Waunakee renter households earning between 30% and 50% of area median income, and 15 renter households earning between 50% and 80% of area median income also report paying more than 50% of their monthly income in housing costs<sup>2</sup>.

In total, about 210 current Waunakee households would likely use income-qualified rental units, if available. If we deduct the existing 70 rental units affordable to those below 30% of area median income, we can estimate that a minimum of 140 income qualified units would be needed to meet the needs of current Village residents.

### GLOSSARY

**Cost-burdened Household**  
A cost-burdened household pays more than 30% of their monthly income on housing costs.

**Extremely Cost-burdened Household**  
A extremely cost-burdened household pays more than 50% of their monthly income on housing costs.

Cost-burdened and extremely cost-burdened households typically cut back on necessities -- as food, healthcare, transportation, and education -- in order to cover housing costs.

According to the Dane County Housing Needs Assessment, 400 households in Waunakee -- 210 renter households and 190 owner households -- are cost-burdened or extremely cost-burdened.

<sup>2</sup> Paulsen, Kurt (2019, March). Presentation to the Waunakee Housing Task Force

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## Implications for Housing

- There are indications that the Village supply of housing units available for middle incomes falls short of the demand.
- Townhomes and owner-occupied condominium units priced at \$250,000 and below supply ownership options for many Village residents with modest middle class and working-class incomes. Removing or revising restrictions on multifamily housing construction may provide this group with a greater range of options in the Village.

## Implications for Broader Community Development

- Unless there is an increase in homes available for households earning 80-100% of area median income, roughly \$80,000 to \$100,000 in Waunakee, the proportion of middle-income households in the Village is likely to continue to decrease (Figure 1).

# Resident Survey

The Waunakee Housing Task Force prioritized the need for public input on housing issues. As a result, a survey of Village residents was fielded beginning April 9, 2019, and continuing until the present time. Data below are taken from surveys completed before June 14, 2019. A total of 447 Village residents and 44 school district residents (not residing in the Village) completed the survey during this period. Questions focused on housing issues alongside issues of community identity and openness to new or different residents. Results in this document pertain to questions that directly affect housing and the recommendations made by the Waunakee Housing Task Force.

In order to guarantee a representative sample, a minimum of 374 valid responses were needed. Counting Village resident respondents only, and assuming a population of 13,755 for the Village based on the U.S. Census, the confidence interval for this result is +/- 4.56.

## Resident Survey Respondents

Respondent median age was 47, and women (65.5%) responded to the survey in greater numbers than men (34.3%). Respondents also owned homes (93.3%) at higher rates than they rented homes (6.0%). About 67% of respondents reported working full time, as compared to part time (12%), reporting retirement (16%), being unemployed but not looking for work (4.6%) or unemployed but looking for work (0.5%). About 4% of respondents reported a high school degree/GED as their highest level of education, 10% reported some college, 10% reported an associate’s or 2-year degree, 42% reported a bachelor’s degree, and 33% reported a professional or doctorate degree. Median household income among respondents was \$150,000 or greater. Table 10 depicts survey respondents in comparison to U.S. Census estimates of the Waunakee population (Table 10).

Table 10. WaunakeeHousing Task Force Resident Survey Respondent Profile		
Characteristic	Respondents	Waunakee Population <sup>1</sup>
Median age	47	39.8
Gender	64.5% female	51.4% female
Homeownership	93.3%	76.9%
Education		
High school or higher	99.7%	98.3%
Bachelors or higher	75%	52.4%
Median household income	\$150,000+	\$98,224
Employed (any level)	79%	72.5%

<sup>1</sup>U.S. Census Quickfacts

## Housing affordability, growth and infrastructure are concerns

One of the primary purposes of the survey was to gauge resident opinion regarding housing options in the Village. But before assessing those opinions, the Task Force wanted to understand where housing placed among all concerns. The first question of the survey asked, “Before we start the survey, we would like to ask you: What is the most important challenge or issue facing Waunakee?” Among the 414 respondents who answered the question, 81 remarked on housing. Among these, 50 responses referenced affordable housing or high housing costs. Another 71 respondents remarked on growth as the key challenge, with 21 referencing the impact of growth on infrastructure, such as schools or roads, and 14 expressed a preference that Waunakee not grow or stop growth. However, infrastructure was the most cited challenge. A total of 106 comments referenced infrastructure, with 63 of these citing the need for additional retail and/or restaurants.

Concerns were personal, and not limited to general opinions regarding Village development. In total, 56% of survey respondents agreed with the statement “I am worried that homes in Waunakee are becoming too expensive” and 53% agreed that “I am worried that others I care about will not be able to afford to live in Waunakee” (Table 11).

Table 11. Personal concerns of Waunakee resident respondents regarding housing.			
<i>I am worried that ...</i>	Agree	Neither Agree nor Disagree	Disagree
... Homes in Waunakee are becoming too expensive	56%	11%	33%
... Others I care about will not be able to afford to live in Waunakee	53%	13%	34%
... Other residents of Dane County will not be able to afford to live in Waunakee	35%	22%	43%
... The cost of homes in our community will make it too expensive for me to remain	34%	11%	55%
N=447			

## Housing Task Force goal of balancing concerns about housing prices and housing diversity with homeowner concerns

Based on survey results, the Housing Task Force sought to balance concerns of current residents and homeowners with concerns among the same group that the community may be inaccessible to some. Among those who are worried that Waunakee is becoming too expensive, 83% agreed that “I am worried that others I care about will not be able to afford to live in Waunakee.” Sixty-nine percent believe there are not a sufficient number of housing options for young families starting out, and 37% agreed with the statement “The cost of homes in our community will make it too expensive for me to remain.” Despite these concerns, 51% of those who are worried about Waunakee homes becoming too expensive also agreed with that “Residents of Waunakee benefit from higher home prices” (Table 12). One plausible interpretation is that residents recognize they benefit from higher home prices, a sentiment particular to homeowners, but a certain proportion are interested in widening accessibility and expanding the scope of who can live in the community.

<b>Table 12.</b> Answer distribution for “In your opinion, are there a sufficient number of housing options in Waunakee for the following types of people?”				
	No	Not Sure	Yes	Total
People with lower incomes	67%	13%	20%	100%
Renters, in general	48%	17%	35%	100%
Young families starting out	48%	13%	40%	100%
Senior citizens	48%	13%	40%	100%
Renters with families	48%	21%	32%	100%
People from diverse backgrounds	35%	27%	38%	100%
Young professionals or tradespeople	34%	15%	51%	100%
People with disabilities	33%	46%	21%	100%
N=447				

## Support for housing targeting seniors, physically and mentally disabled residents and workforce

Beyond understanding broad assessments of housing options in the Village, the Task Force also sought to understand the individual needs of respondents and their households, and the degree to which respondents felt that a particular type of housing was important, regardless of the respondent’s own need (Table 13).

Results indicate that there is a base level of support for workforce housing targeting households with incomes between \$60,000 and \$89,999, and a neutral level of support for housing targeting households with incomes ranging \$40,000 to \$49,999 and \$50,000 to \$59,999 (Table 13). When looking at housing targeting lifestyles or life stages, there is relatively strong support for housing targeting senior citizens, and a clear base level of support for housing targeting households with a physically disabled member, mentally disabled member, as well as multi-generational and fixed/limited income households (Table 13).

**Table 13.** Would you or anyone in your household use the following type of housing, either now or in the future, if it was available? [Plus] Regardless of whether your or anyone in your household would use this type of housing, how important is it that we include it in community improvements?

1=would not use at all/not important at all; 7=Definitely would use/Very important

	Would Use Mean (SD)	Is Important Mean (SD)
<b>Income Targeted</b>		
Less than \$30,000	1.73 (1.76)	3.03 (2.37)
\$30,000 to \$39,999	1.84 (1.79)	3.29 (2.42)
\$40,000 to \$49,999 (all)	1.98 (1.86)	3.62 (2.39)
<i>Village Residents</i>	---	3.55 (2.40)
<i>School District Resident (not Village)</i>	---	4.44 (2.77)
\$50,000 to \$59,999	2.31 (2.07)	3.92 (2.39)
\$60,000 to \$69,999	2.51 (2.17)	4.07 (2.27)
\$70,000 to \$79,999	2.75 (2.28)	4.15 (2.25)
\$80,000 to \$89,999	3.11 (2.47)	4.22 (2.29)
<b>Lifestyle Targeted</b>		
Senior citizen households	3.69 (2.32)	5.30 (1.90)
Multi-generational households	2.76 (2.08)	4.27 (2.20)
Fixed or limited income households	2.49 (2.04)	4.07 (2.40)
Households with a physically disabled member	2.33 (1.90)	4.71 (2.02)
Households with a mentally disabled member	1.82 (1.54)	4.45 (2.11)
Other, please specify	2.47 (2.51)	---
Statistically significant differences in responses from Village residents and School District (but not Village) residents for \$40,000 to \$49,000. Responses to all other items did not produce statistically significant differences. N=491		

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## Implications for Housing

- There are strong indications that Village residents recognize the need for housing diversity within Waunakee.
- Support for multi-generational housing could indicate the need for housing that includes independent living quarters, i.e. a “granny flat” or young adult apartment.
- Support for housing targeting households with a physically or mentally disabled member likely indicates a greater need architecture and design that is accessible, flexible and could accommodate a wider range of abilities, and/or the need for supported, independent adult living for adults with disabilities.

## Implications for Broader Community Development

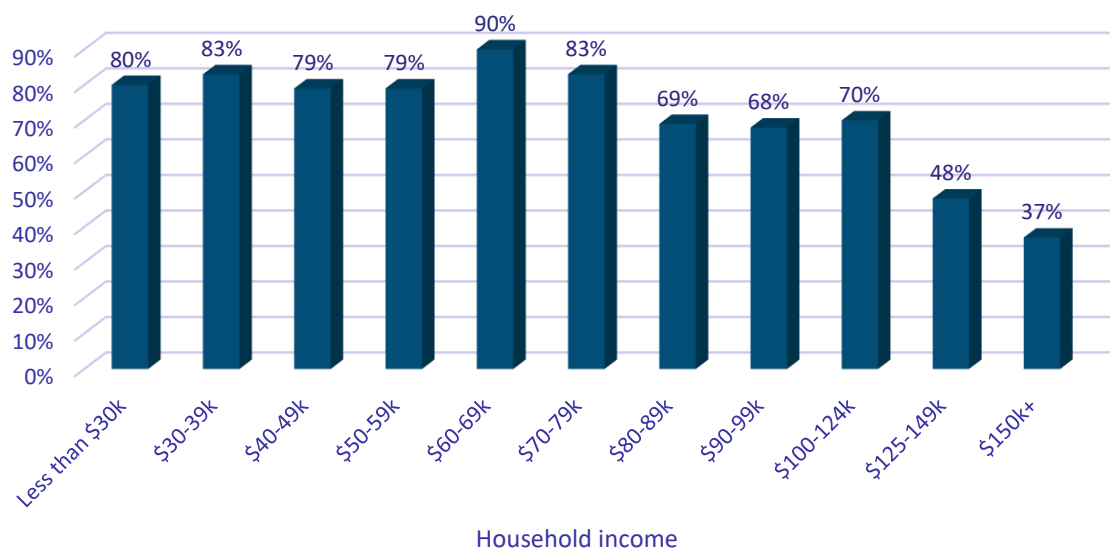
- Support for multi-generational housing likely indicates changes in family structures over the past decade.
- Support for housing targeting households with a physically or mentally disabled member likely indicates a perceived need among residents for greater inclusivity. A focus group or study of families and individuals living with different abilities may illuminate the degree to which their housing needs are met in the Village.

# Commuter Survey Results

## Commuters View Waunakee as Welcoming, but Across all Income Ranges Cite Lack of Homes in their Price Range

Recruiting for professional level white-collar jobs, such as teachers or management staff, may also be constrained by the cost of housing in Waunakee. In a survey of commuters to Waunakee, 70% of respondents agreed that Waunakee was a welcoming community, 87% agreed that it had a nice look and feel, 97% agreed that the Village has quality local schools and 65% agreed that there were ample job opportunities. Despite this, and across all income categories, respondents reported that there weren’t houses or rental units in their price range (Figure 5).

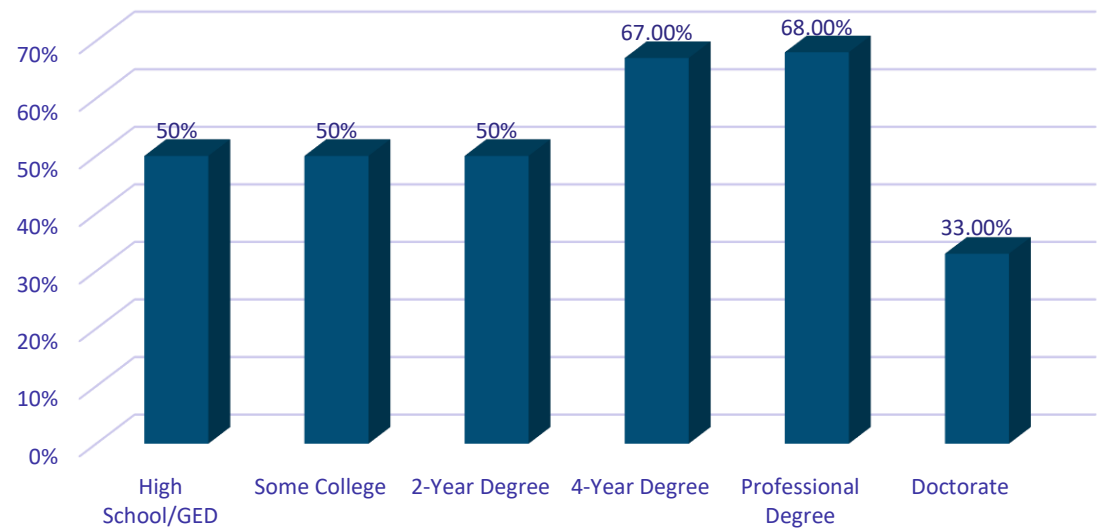
**Figure 5.** Percent of Commuters by Household Income Who Disagree with the Statement “Waunakee has houses or rent within my price range.”



n=244

The sentiment that the Village does not have houses or rent within respondent price ranges was stronger among commuters with bachelor’s or professional degrees as compared to other education levels (Figure 7).

**Figure 7.** Percent of Commuters by Education Who Disagree with the Statement “Waunakee has houses or rent within my price range.”



n=244

Notably, the median income for commuter respondents fell in the \$100,000 to \$124,999 range, which is above the median income for all Dane County households (Table 14).

Table 14. Commuter Survey. Annual Household Income		
	Percent	Cumulative Percent
\$30,000 or less	2.4	2.4
\$30,000 to \$39,999	2.9	5.3
\$40,000 to \$49,999	6.8	12.1
\$50,000 to \$59,999	6.8	18.8
\$60,000 to \$69,999	4.8	23.7
\$70,000 to \$79,999	8.7	32.4
\$80,000 to \$89,999	7.2	39.6
\$90,000 to \$99,999	9.2	48.8
\$100,000 to \$124,999	20.8	69.6
\$125,000 to \$149,999	13.0	82.6
\$150,000 or more	17.4	100.0
Total	100.0	

n=244

**Commuters: Waunakee has Quality Schools, Nice Look & Feel, and is Welcoming, but Lacks Diversity, Homes in Our Price Ranges.**

In total, 70% of respondents agreed that Waunakee was a welcoming community, 87% agreed that it had a nice look and feel, 97% agreed that the Village has quality local schools and 65% agreed that there were ample job opportunities. Unfortunately, 63% reported that there weren’t houses or rental units in their price range (Table 15).

Table 15. Commuter Survey. How much do you agree or disagree that Waunakee has/is ...				
	Agree	Neutral	Disagree	Total
Quality local schools	96.7	4.3	0.0	100.0
A nice look and feel	87.2	10.9	1.9	100.0
A welcoming community	70.0	19.5	10.5	100.0
Job opportunities	65.4	23.7	10.9	100.0
Residents similar to you and your household	62.1	17.4	20.5	100.0
Close enough to spouse or partner’s job	55.0	24.1	20.9	100.0
Close to family and friends	49.8	26.5	23.7	100.0
Property tax in your price range	26.2	24.4	48.8	100.0
Houses or rent in your price range	26.2	10.9	62.9	100.0
Diverse people and lifestyles	21.9	13.3	64.8	100.0
n=244				

# Defining Income Related Housing Targets

The Housing Task Force recognized that the term “affordability” is relative to household income and difficult to define. Instead of a single definition, the Task Force evaluated who is currently in the community and how the current population compares to the recent historical population. Changes in the population were considered alongside the workforce needs of businesses within the Village and the housing needs of those commuting to the Village. This information was then considered to determine if a sufficient number and variety of units were available in the Village that would be suited to different groups that are needed within the Village.

After considering the Charge to The Task Force, members reviewed data and made recommendations under the following principles:

- Housing should accommodate workforce needs.
- People who work in the Village should be able to live in the Village.
- Housing strategies should address the needs of those who are currently underserved in the Village market,
  - Special consideration should be given to those currently living in the Village whose housing needs are not met.
- Transportation alternatives will change and be needed,
  - Providing housing is a more practical option for meeting workforce needs than developing a regional transit strategy or developing transportation infrastructure.

In addition to guiding principles, the Task Force articulated a set of community concerns that would also guide decisions:

- Maintain the tax base,
  - Assure that population growth is consistent with the Village’s capacity to provide essential services.
- Maintain the quality of schools,
  - Assure that housing growth is consistent with the school district’s capacity to accommodate that growth.
- Maintain community character,
  - Assure that housing development is compatible with the character of the community
- Develop designs and plans that enhance existing structures and are consistent with existing structures.

# Identifying the Waunakee Housing Gap & Articulating Recommendations

## Senior Housing

The Task Force considered data indicating that retirement incomes have declined even as the proportion of retirees in the Village has grown (Page 10, Table 4). The Task Force also recognizes that senior citizen housing is a critical need. However, the Task Force felt that this group should have a strong voice in development related to their needs and suggests a series of follow up focus groups with this population.

### Recommendation

- **Recommendation 1:** In recognition that senior housing is needed, the Task Force suggests further study focused on the needs and desires of senior citizens in the Village.

## The Missing Middle

The Task Force relied on the analysis in Figures 1 and 2, which indicated that 11.9% of households earned 80-100% of area median income in 2017, as opposed to a projected 28% in the same category if the Village had grown proportionally based on its 2000 census data (and after adjusting for inflation). This sharp decline indicates that this income group has either left the Village or has been unable to buy into the Village or rent homes within the Village. Splitting the difference between the current 12% and projected 28%, and evening out the distribution curve would mean 646 households in Waunakee should fall into that income group. Currently 430 households fall in that range.

Using a five-year time horizon and considering unofficial upper limits on single family homes constructed annually, as well as the typical number of homes constructed each year (see Table 8), the Task Force recommends the construction of 160 additional homeowner units priced to target households of four earning 80-100% of area median income per HUD guidelines (see Table 9). With the consideration that homeownership is not the appropriate option for all households, the addition of a minimum of 59 market rate rental units should achieve the goal of 646 households earning 80 to 100% of area median income. The Task Force suggests a progress check in year three to determine if this goal will be met, and annual progress checks thereafter.

### Recommendation

- **Recommendation 2:** It is recommended that 160 housing units priced to target households making 80-100% of area median income be constructed within the next five years.

## Workforce Housing

Information presented to the Task Force during the March meeting indicated that multi-family housing is critical to meeting the needs of home owners and renters at less-than-median incomes. Until Section 133-15 *Restrictions on Rezoning for Multi-Family Use* is reconsidered, it is difficult to make recommendations regarding homeownership for households that may need reasonably priced condominiums or townhomes as ownership options.

Despite the lack of a recommendation for this category, it should be noted that ownership options at a variety of income levels are valued by the Task Force and considered important for an inclusive community. As noted on page 20, paragraph 4, condominium ownership priced to meet the needs of households at 80% or less of area median income (Table 8) are an important part of housing stock for this income group within the Village.

Therefore, the focus of this recommendation is meeting the needs of current cost-burdened renters who are residing within the Village. The Task Force relied on the Dane County Housing Needs Assessment study, which indicates 210 renters in the Village are cost-burdened and there is a shortfall of 140 units with rents priced at affordable levels for these households. Keeping in mind that the recommendations are on a five-year timeline, and considering the time necessary to develop a project, plus the strong preference that any project include market rate rentals as well as income-qualified rentals, the Task Force recommends that a minimum of 75 income-qualified units be constructed using Low Income Housing Tax Credit (LIHTC) financing along with other mechanisms to defray the cost to developers and qualified renters.

### Recommendations

- **Recommendation 3:** It is recommended that 75 income-qualified rental units be constructed within the next five years, incorporated into mixed income development.
- **Recommendation 4:** It is recommended that the Village work with developers and/or lenders to pursue a variety of housing loans/credits including TIF financing, low income housing tax credit (LIHTC) and assistance from the Federal Home Loan Bank (FHLB).
- **Recommendation 5:** It is recommended that the Village request the University of Wisconsin Madison MBA real estate students identify and assess sites for workforce housing within Village limits.

## Multifamily Housing

As directed by the Charge to the Task Force, members reviewed Policy 2.5, Section 133-15 *Restrictions on Rezoning for Multi-Family Use* (below). In considering a recommendation the Task Force reviewed work prepared by [Jason Valerius, AICP, MSA Professional Services](#)

### **Sec. 133 - 16. - Restriction on rezoning for multifamily use.**

*(a) Intent. It is the intent of this section to promote the health, safety, and general welfare of the residents of the village by limiting the total number of multifamily units, defined as three or more attached dwelling units, available for occupancy in the village so that there will continue to be a predominance of the population living in detached single- or two-family residences.*

*(b) Determination for rezoning. No additional rezoning to R-4, R-5, or PUD with multifamily units shall be allowed which would have the effect of allowing more than 25 percent of the total dwelling units to be multifamily units. Dwelling units designed and approved as owner-occupied condominiums for which the condominium declaration under Wis. Stats. § 703.09 prohibits the rental thereof shall not be considered single-, two- or multifamily residences for purposes of the determination under this subsection. Any other condominium dwelling units shall be considered multifamily dwelling units under this subsection. In implementing this subsection, the plan commission may either deny or modify a proposed zoning amendment or conditional use permit or direct the building inspector to not issue additional building permits, unless such issuance would be consistent with the intent of this section.*

*(c) Applicability. This section shall not apply to properties that were rezoned to R-4, R-5 or PUD with multifamily units prior to December 31, 1997.*

Per the Comprehensive Plan, it should be noted that the section on housing ([pg. 43](#)) contains the following directive:

*2.5. Maintain regulations that require new developments maintain a ratio of 75 percent detached, single family units and 25 percent attached units. Redevelopment projects and senior housing projects are exempt from this policy.*

Members noted that these restrictions may increase pressure to redevelop existing neighborhoods, and may also prevent the successful proposal of small-scale, multi-family projects in greenfield spaces that are not attached to new single-family development. It should also be noted that the language in the Comprehensive Plan implies a requirement that 25% of units be attached, and Section 133-16 contains a prohibition that no more than 25% of units be attached. Additionally, the original language in Section 133-16 regarding the 75/25 ratio could be interpreted to apply to discrete development proposals or to the Village as a whole. Finally, it is not clear if the original intent was solely to restrict rental units, owner occupied units, or to restrict both.

## Recommendations

- **Recommendation 6:** It is recommended that Section 133-16 be reconsidered and rewritten.
  - Given the potential for far-reaching unintended consequences, and the lack of clarity regarding the full intent of the original language, the Task Force declined to rewrite the policy itself.
- **Recommendation 7:** It is recommended that the Village work to identify land and developer(s) for smaller development projects (e.g. incremental development options that are at neighborhood scale, such as fourplex, small unit multifamily).
- **Recommendation 8:** It is recommended that the Village work with developers to build small-scale real estate ownership projects (co-housing, cooperative and neighborhood scale units).
- **Recommendation 9:** It is recommended that the Village require a range of housing affordability options in the same development (mixed income) with a range of housing types.

## Supporting Home Ownership

There are a number of publicly available programs designed to provide assistance to first time home buyers, as well as previous home owners who are easing back into ownership after a period of renting. Additionally, it is the hope of the Task Force that those renting in the community will be able to transition to ownership if it is their desire to do so. Therefore, the Task Force makes the following recommendations:

- **Recommendation 10:** It is recommended that the Village create an index/catalog of publicly available programs designed to provide assistance to homeowners and home buyers.
- **Recommendation 11:** It is recommended that the Village hold periodic seminars and outreach to provide first time home buyer guidance and increase awareness of publicly available programs designed to provide assistance to homeowners and home buyers.

The Task Force recognizes that this summary report represents a start toward diversifying housing options in Waunakee. The intense study required of Task Force members, the data reviewed during the course of the Task Force's work, and the number of experts drawn upon has expanded the capacity of those serving. In order to capture that capacity, the Task Force recommends:

- **Recommendation 12:** It is recommended that the Village develop an ongoing committee that includes Plan Commission and Housing Task Force members to continue addressing long-term affordable home ownership and rental options.

## Summary of Recommendations

- **Recommendation 1:** In recognition that senior housing is needed, the Task Force suggests further study focused on the needs and desires of senior citizens in the Village.
- **Recommendation 2:** It is recommended that 160 housing units priced to target households making 80-100% of area median income be constructed within the next five years.
- **Recommendation 3:** It is recommended that 75 income qualified rental units be constructed within the next five years, incorporated into mixed income development.
- **Recommendation 4:** It is recommended that the Village work with developers and/or lenders to pursue variety of housing loans/credits including TIF financing, low income housing tax credit (LIHTC) and assistance from the Federal Home Loan Bank (FHLB).
- **Recommendation 5:** It is recommended that the Village take up the offer to have University of Wisconsin Madison MBA real estate students identify and assess sites for workforce housing within Village limits.
- **Recommendation 6:** It is recommended that Section 133-16 be reconsidered and rewritten.
  - Given the potential for far-reaching unintended consequences, and the lack of clarity regarding the full intent of the original language, the Task Force declined to rewrite the policy itself.
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End of Report



Extension  
UNIVERSITY OF WISCONSIN-MADISON



**WAUNAKEE/WESTPORT JOINT PLAN COMMISSION SUMMARY SHEET**

**MEETING DATE:** 09/10/2019

**ITEM:** New Business No. 3

**TITLE:** Update on Veridian Consult for the Breunig Property at STH 19 and Schumacher Road

**ISSUE SUMMARY:** Attached is the conceptual plan for the Breunig property development. The property is in the Town of Westport but not in the JPA. This is for consultation purposes only.

**STAFF RECOMMENDATION:** None

**RECOMMENDED MOTION:** No action necessary.

**ATTACHMENT(S):** Breunig Concept Plan



Monday, July 29, 2019

Kevin Even  
500 West Main Street  
Waunakee, WI 53597

Re: Breunig Property  
Concept Plan Submittal

Dear Kevin:

Veridian Homes is pleased to submit the attached Concept Plan for the development of the Breunig Property, submitted for discussion at the August 12, 2019 Plan Commission.

Built around the full spectrum of housing, this project integrates attainable first-time homebuyer, move up, luxury, and empty nester housing set within a framework of walkable streets, parks, open space and trails. This property forms the eastern gateway into Waunakee and is consistent with the recommendations in the Waunakee/Westport Comprehensive Plan.

We look forward to working with you and the City Commissions on the implementation of this exciting neighborhood.

Sincerely,

Brian Munson  
Principal

Cc: Chris Ehlers, Veridian Homes  
Dan Day, D'Onofrio Kottke

Breunig Site  
Preliminary Concept Plan  
Waunakee, Wisconsin

Legend		
Proposed Single Family		
	Alley Accessed (37')	31
	Alley Accessed (45')	58
	Street Accessed (51')	47
	Street Accessed (59')	60
	Street Accessed (65')	20
	Street Accessed (69')	74
	Street Accessed (80')	43
Proposed Twinhomes		
	Tuck Under Twins (Alley)	22
	Flat Site Twinhomes (Alley)	28
	Haven Twinhomes (Alley)	72
	Haven Twinhomes (Front)	24
Total Single Family & Twinhome Units		479
	Multi-Family (25 du/acre)	205
Total Residential Units		684
Farm Mixed Use Center		
	Farm Mixed Use Center (~ 6.7 Acres)	TBD
Public Open Space		
Park Space		~ 14.4 Acres
Stormwater		~ 14.9 Acres
Stormwater Conveyance/ Buffer		~ 2.4 Acres
Greenway (100' wide)		~ 3.4 Acres
Highway 19 Outlots		~ 1.7 Acres

