

**NOTICE OF  
JOINT REVIEW BOARD MEETING  
REGARDING THE PROPOSED PROJECT PLAN AND DISTRICT BOUNDARY  
FOR TAX INCREMENTAL DISTRICT (TID) NO. 3  
IN THE  
VILLAGE OF PEWAUKEE, WISCONSIN**

**Tuesday, March 9, 2021**

**1:00 p.m.**

Meeting Available on Zoom.us at the following meeting number:

<https://us02web.zoom.us/j/85013308858>

In lieu of participating via the Zoom website, the alternative telephone only dial-in is:

Dial in: 312-626-6799 850 1330 8858

"Due to the COVID-19 Pandemic and in recognition of the declaration of states of emergency by the President, the Governor and the Village President, this meeting will not be open to the public in an in-person capacity. Those wishing to observe may do so by downloading the ZOOM app to your personal computer, tablet or smart phone and utilizing the above information to join via either computer or telephone. If you wish to communicate in written format with the Commission you may send written comments to the Village Clerk at 235 Hickory St. Pewaukee, WI 53072 or you may email the Clerk at [csmith@villageofpewaukee.com](mailto:csmith@villageofpewaukee.com)."

**Agenda**

1. Call to Order.
2. Roll Call.
3. Approval of Minutes – February 9, 2021 Meeting
4. Discussion and Possible Action on Joint Review Board Resolution #2021-01, Resolution Formally Approving the Creation of Tax Incremental District No. 3 in the Village of Pewaukee, Waukesha County, Wisconsin.
5. Adjourn.

Note: It is possible that members and/or possibly a quorum of members of other governmental bodies of the municipality may be in attendance at the above-stated meeting to gather information; action will not be taken by any governmental body at the above-stated meeting other than the governmental body specifically referred to above in the notice. Upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids and services. To request such assistance, contact the Village Clerk at 262-691-5660.

Dated: March 4, 2021

**Village of Pewaukee  
Joint Review Board Organizational Meeting  
Regarding the Proposed Project Plan and District Boundary for Tax Incremental  
District (TID) No. 3 in the  
Village of Pewaukee, Wisconsin via Zoom  
February 9, 2021**

**1/2. Call to order/Roll Call**

Clerk Smith called the meeting to order at 1:00 p.m.

Present: Waukesha County Representative, William Duckwitz – Budget Manager; Pewaukee School District Representative, John Gahan – Assistant Superintendent; Village of Pewaukee Representative, Village President Jeff Knutson

Also Present: Village Administrator, Scott Gosse; Village Clerk, Casandra Smith; Village Attorney, Mark Blum; Brian Ruechel, Robert W. Baird; Chuck Nichols

**3. Discuss Role of the Joint Review Board**

Brian Ruechel of Robert W. Baird reviewed the purpose of the Joint Review Board and stated that each taxing jurisdiction is entitled to have a representative with the responsibility to deny or approve the Tax Incremental District (TID). The process is to publish all required notices, hear the reason for the TID creation, hold a public hearing with the Plan Commission meeting who will make a recommendation to the Village Board and forward their decision to the final meeting of the Joint Review Board. Approvals will be made by resolutions and an annual meeting is required for the district.

**4. Appointment of Chairperson**

**President Knutson moved, seconded by William Duckwitz, to appoint John Gahan as the Chairperson of the Joint Review Board.**

**Motion carried on roll call vote 3-0.**

**5. Appointment of Public Member**

President Knutson stated that he would like to nominate Chuck Nichols as the public member of this Board. Mr. Nichols is the current citizen member of the TID-2 Joint Review Board and therefore knowledgeable in this area. Mr. Nichols is also a former Village President and Village Trustee. Mr. Nichols responded to Mr. Duckwitz that he does not have any conflict of interests regarding the TID.

**President Knutson moved, seconded by William Duckwitz, to appoint Chuck Nichols as the Public Member of the Joint Review Board.**

**Motion carried on roll call vote 3-0.**

**6. Overview and Purpose and Description of the TID Being Created**

Administrator Gosse stated that the purpose of this TID is to focus on the redevelopment of the St. Mary's church property for which the Village has made an offer to purchase. The school and the gym have been vacant many years and the goal is to develop the property with single family homes. The sale of the church is intended as it is designated by the Village as a historical property. The property is currently tax exempt and the proposed redevelopment would put majority of the property on the tax rolls as new and immediate increment.

Attorney Blum added that the Village is anticipating this being a blight elimination TID due to the structures on site being vacant for some time along with issues regarding infrastructure and access to the property. Some buildings will need asbestos abatement as well due to the age of the building. The cemetery will continue to be owned and operated by Queen of Apostles and the Archdiocese.

Due to the irregular shape of the properties, this is a difficult property to develop. Mr. Ruechel reviewed the Project Plan and District Boundary for TID 3 document as included in the agenda packet. Administrator Gosse responded to Mr. Duckwitz stating that the prospective development per the developer estimates about \$400,000 per lot which creates a tax increment of approximately \$23,000,000. Mr. Ruechel responded to Mr. Duckwitz that the tax rate is the current 2020 equalized tax rate from the WI DOR which is on the tax incremental tax worksheet. Administrator Gosse stated that the purchase price is on page 12 and all projections are conservative estimates but could add a threshold into the document to come back to this board if the amount exceeds what is presented.

Attorney Blum responded to Mr. Gahan that the top characteristics that make this blighted are the irregular shape, the infrastructure issues not being sufficient for redevelopment and access to the site is difficult. This property has been on the market for some time with one developer that came forward but did not proceed.

Attorney Blum responded to Mr. Gahan regarding the church rehab; the vacant church is not part of the TID and any improvements will need to be made by the new owners. Attorney Blum responded to Mr. Gahan that the Village is not anticipating any revenue for rental of the church as it needs significant remodeling. Attorney Blum responded to Mr. Gahan, if the church is sold it will be a nominal amount recognizing that the new owner would have to spend a significant amount of money to bring the structure to the point that it would be able to be occupied.

Mr. Ruechel responded to Mr. Gahan that the call provisions are usually included at the sale and determined at that time. Attorney Blum responded to Mr. Duckwitz, that he doesn't see any changes in the project plan because the church is not included in this plan but if it was determined that the church would be included in the project plan it would have to come back to the Board, but if not, there wouldn't be a review needed as long as no additional funds are sought.

### **6. Set next meeting of March 9, 2021 for approval of the Tax Incremental District No. 3**

Consensus was to set the next meeting to be held on March 9<sup>th</sup>, 2021 at 1 p.m.

### **3. Adjourn.**

Mr. Gahan moved, seconded by Mr. Duckwitz, to adjourn.

**Motion carried unanimously at 1:52 p.m.**

Respectfully submitted,

Cassandra Smith  
Village Clerk



To: Joint Review Board

From: Scott A. Gosse  
Village Administrator

Date: March 4, 2021

Re: Agenda Item 4, Discussion and Possible Action on Joint Review Board Resolution #2021-01, Resolution Formally Approving the Creation of Tax Incremental District No. 3 in the Village of Pewaukee, Waukesha County, Wisconsin

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### **BACKGROUND**

Attached for your review and consideration please find a copy of draft Discussion and Possible Action on Joint Review Board Resolution #2021-01, Resolution Formally Approving the Creation of Tax Incremental District No. 3 in the Village of Pewaukee, Waukesha County, Wisconsin. Also attached as background information please find a copy of the Plan Commission's resolution adopting the Project Plan and recommending the creation of TID #3 to the Village Board as well as a copy of the Village Board's resolution adopting the project plan and creating TID #3. Incorporated as part of the Plan Commission and Village Board resolution's is the Findings of Fact related to the creation of TID #3 as a blight elimination district.

### **ACTION REQUESTED**

The action requested of the Joint Review Board after reviewing the actions of the Plan Commission and Village Board is to adopt Joint Review Board Resolution #2021-01, Resolution Formally Approving the Creation of Tax Incremental District No. 3 in the Village of Pewaukee, Waukesha County, Wisconsin.

### **ANALYSIS**

Please note that the proposed project plan has been modified to include a not to exceed amount as part of the proposed budget for the project plan. The one change to the estimated budget was an increase to the estimate for the sanitary sewer relay project of \$95,000 to an estimate of \$500,000. A revised proforma has been incorporated into the proposed project plan which illustrates that the projected cash flow for the TID is still very positive.

Village staff and our consultants with Robert W. Baird & Company will be in attendance to answer any questions the Joint Review Board may have on this matter.

Attachments

## **JOINT REVIEW BOARD RESOLUTION #2021-01**

Resolution Formally Approving the Creation of Tax Incremental District No. 3

### **APPROVING THE CREATION OF TAX INCREMENTAL DISTRICT NO. 3, VILLAGE OF PEWAUKEE, WAUKESHA COUNTY, WISCONSIN**

**WHEREAS**, the Village of Pewaukee seeks to create Tax Incremental District No. 3, Village of Pewaukee, Waukesha County, Wisconsin (“the District”); and

**WHEREAS**, Section 66.1105(4m) of the Wisconsin Statutes requires that a Joint Review Board (the “Board”) shall convene to review the proposal to create a tax incremental district; and

**WHEREAS**, the Board consists of one representative chosen by the Pewaukee School District, one representative chosen by the Waukesha County Area Technical College District, and one representative chosen by Waukesha County, all of whom represent local governmental entities and school districts that have the power to levy taxes on property within the District, and one representative chosen by the Village and one public member; and

**WHEREAS**, the public member and the Board’s chairperson were selected by a majority vote of the Board members before the public hearing was held on February 11, 2021, pursuant to Section 66.1105(4)(a) of the Wisconsin Statutes; and

**WHEREAS**, all Board members were appointed and the first Board meeting held within 14 days after the notice was published pursuant to Section §66.1105(4)(a) and (e) of the Wisconsin Statutes, was held; and

**WHEREAS**, the Board has reviewed the public record, planning documents, the resolution adopted by the Plan Commission approving the District and adopting the Project Plan, and the resolution adopted by the Village Board approving the creation of the District as authorized by section §66.1105(4)(gm) of the Wisconsin Statutes; and

**WHEREAS**, the Board has considered whether, and concluded that, the District meets the following criteria:

1. The development expected in the District would not occur without the use of tax increment financing and the creation of a tax incremental district.
2. The economic benefits of the District, as measured by increased employment, business and personal income and property value, are sufficient to compensate for the cost of the improvements.
3. The benefits of the proposal outweigh the anticipated tax increments to be paid by the owners of the property in the overlying taxing districts.

**NOW THEREFORE, BE IT RESOLVED THAT** the Recitals set forth above are approved by the Board and incorporated herein and made an enforceable part of this Resolution.

**JOINT REVIEW BOARD RESOLUTION #2021-01**

Resolution Formally Approving the Creation of Tax Incremental District No. 3

**BE IT FURTHER RESOLVED THAT** the Board approves the creation of Tax Incremental District No. 3, Village of Pewaukee, Waukesha County, Wisconsin.

Adopted this 9th day of March, 2021

**Joint Review Board**

**Representing**

\_\_\_\_\_  
**Andrew Thelke**

**Waukesha County**

\_\_\_\_\_  
**John Gahan**

**Pewaukee School District**

\_\_\_\_\_  
**Jane Kittel**

**Waukesha County Technical College**

\_\_\_\_\_  
**Jeff Knutson**

**Village of Pewaukee**

\_\_\_\_\_  
**Chuck Nichols**

**Public Member**

**VILLAGE OF PEWAUKEE, WI**  
**RESOLUTION No. 2021-04**

Resolution Formally Establishing the Boundaries of and Approving the Project Plan for  
Tax Incremental District No. 3

**ESTABLISHING THE BOUNDARIES OF AND APPROVING THE PROJECT  
PLAN FOR TAX INCREMENTAL DISTRICT NO. 3, VILLAGE OF  
PEWAUKEE, WAUKESHA COUNTY, WISCONSIN**

**WHEREAS**, pursuant to Wisconsin Statutes §66.1105 (the "Tax Increment Law") the Village of Pewaukee has determined that use of Tax Incremental Financing is required to promote development and redevelopment within the Village; and

**WHEREAS**, Tax Incremental District No. 3 ("the District") is proposed to be created as a "blighted area district" based on findings that at least 50 percent (by area) of the real property within the District is a blighted area; and

**WHEREAS**, a Project Plan for Tax Incremental District No. 3 has been prepared that includes the following:

1. A statement listing the kind, number, and location of proposed public works or improvements within the District;
2. An economic feasibility study;
3. A detailed list of estimated project costs;
4. A description of the methods of financing all estimated project costs and the time when the related costs or monetary obligations are expected to be incurred;
5. A map showing existing uses and conditions of real property in the District;
6. A map showing proposed improvements and uses in the District;
7. Proposed changes of zoning ordinances, master plan, map, building codes, and Village Ordinances;
8. A statement of the proposed method for relocation of any person to be displaced;
9. A statement indicating how creation of the District promotes the orderly development of the Village;
10. A list of estimate non-project costs;
11. An Opinion of the Village Attorney advising that the plan is complete and complies with Wis. Statute §66.1105(4)(f); and

**WHEREAS**, in accordance with the procedures specified in the Tax Increment Law, the Plan Commission, on February 11, 2021, held a public hearing concerning the project plan and boundaries and proposed creation of the District providing interested parties a reasonable opportunity to express their views on the proposed creation of a tax incremental district and the proposed boundaries of the District.

**WHEREAS**, after said public hearing, the Plan Commission adopted, and recommended to the Village Board that it create the District and approve the boundaries of the District.

**VILLAGE OF PEWAUKEE, WI**  
**RESOLUTION No. 2021-04**

Resolution Formally Establishing the Boundaries of and Approving the Project Plan for  
Tax Incremental District No. 3

**NOW THEREFORE, BE IT RESOLVED** by the Village Board of the Village of Pewaukee that:

1. The Recitals set forth above are incorporated herein and are made an enforceable part of this resolution.
2. The boundaries of the District are hereby approved and established as legally described in Exhibit A attached and incorporated herein by reference.
3. The District is created effective as of January 1, 2021, and shall be known as "Tax Incremental District No. 3, Village of Pewaukee, Waukesha County, Wisconsin".
4. The Village Board finds and declares that:
  - a. At least 50 percent (by area) of the real property within the District is a blighted area as defined in Wisconsin Statute Section 66.1105(2)(ae).
  - b. Based upon the findings, as stated in (a) above, the District is declared to be a blighted area district.
  - c. The improvement of the area is likely to significantly enhance all the other real property value in the District.
  - d. The development activities projected in the Project Plan would not occur without tax incremental financing.
  - e. The equalized value of the taxable property in the District plus the value increment of all other existing tax incremental districts within the Village does not exceed 12% of the total equalized value of taxable property within the Village.
  - f. The Village estimates that less than 35% of the territory within the District will be devoted to retail business at the end of the District's maximum expenditure period, pursuant to Section §66.1105 (5)(b) of the Wisconsin Statutes.
  - g. The project costs relate directly to eliminating blight in the District consistent with the purpose for which the District is created.
  - h. Confirms that the boundaries of the District do not include any annexed territory that was not within the boundaries of the Village on January 1, 2004.
5. The Project Plan, prepared by Robert W. Baird & Co. dated January 22, 2021 which is incorporated herein in its entirety by reference, is approved and the Village further finds that plan is feasible and will be in conformity with the master plan of the Village as the master is to be modified as described in the project plan.

**BE IT FURTHER RESOLVED THAT** the Village Clerk is hereby authorized and directed to apply to the Wisconsin Department of Revenue, in such form as may be prescribed, for a "Determination of Tax Incremental Base", as of January 1, 2021, pursuant to the provisions of Section §66.1105 (5) (b) of the Wisconsin Statutes.



**VILLAGE OF PEWAUKEE, WI  
RESOLUTION No. 2021-04**

Resolution Formally Establishing the Boundaries of and Approving the Project Plan for  
Tax Incremental District No. 3

**BE IT FURTHER RESOLVED THAT** the Village Assessor is hereby authorized and directed to identify upon the assessment roll returned and examined under section §70.45 of the Wisconsin Statutes, those parcels of property which are within the District, specifying thereon the name of the District, and the Village Clerk is hereby authorized and directed to make similar notations on the tax roll made under Section §70.65 of the Wisconsin Statutes, pursuant to Section §66.1105(5)(f) of the Wisconsin Statutes.


Adopted this 2nd day of March, 2021

**Village of Pewaukee**

By   
Jeff Knutson, Village President

**CERTIFICATION**

I hereby certify that the foregoing Resolution was duly adopted by the Village Board of  
the Village of Pewaukee on the 2nd day of March, 2021.

  
Cassie Smith,  
Village Clerk

## SUMMARY OF TID FACTUAL FINDINGS

As required by Sec. 66.1105, Wis. Stats. and as documented in the Exhibits contained and referenced herein, the following findings are made:

1. That the area described herein on the attached map (Exhibit 1) is a blighted area as defined in Section 66.1105(2)(ae), Wisconsin Statutes, that the property substantially impairs or arrest the sound growth of the Village and is in need of redevelopment and that "but-for" the creation of a tax incremental district, redevelopment (1) would not occur, or (2) would not occur in the manner at the value, or within the time frame desired by the Village. In making this determination, the Village has considered the following information:

- In order to make the area proposed for redevelopment suitable for development and redevelopment, the Village will need to make a substantial investment to pay for the costs of site preparation, installation of utilities, installation of streets, and related streetscape items and other associated costs. Currently, existing sanitary sewer pipes are undersized to accommodate the size of development proposed for the area. Please see an attached letter from the Village's Engineer, R. A. Smith, dated July 29, 2019 (attached as Exhibit 2), confirming existing sewer pipes in the proposed redevelopment area are undersized and would not accommodate the size of development anticipated. When considering full development conditions, three (3) out of the four (4) sewer pipes serving the redevelopment area east of High Street are undersized. To accommodate the size of development desired by the Village, the Village will have to invest significant resources in installing 12 inch sewer mains to accommodate the size and type of development desired.
- The redevelopment area's current storm water management system would not accommodate the density and type of development desired by the Village. Please see the attached letter from the Village engineer dated July 29, 2019 (Exhibit 2), which specifically outlines these concerns. In order to accommodate storm water runoff created by a development in the proposed redevelopment area. The Village Engineer recommends consideration be given to extending storm sewer onto the land proposed for redevelopment to pick up storm water in concentrated flows and allow it to travel into the storm sewer system. Alternatively, the Village will have to construct substantial infrastructure in order to contain and manage storm water runoff from any proposed development in the redevelopment area should connection to the storm sewer not be feasible.
- The proposed redevelopment area has inadequate vehicular access to support a wholesale redevelopment of the area. Namely, existing access points to the redevelopment area located at Evergreen Lane and Quinlan Drive, are inadequate to support the type of density sought by the Village in a proposed development. As evidenced in the attached letter from the Director of Public Works (Exhibit 3), current access points along Quinlan Drive and Evergreen Lane would not support the anticipated increase in traffic flow to this area, nor is the existing access point at Evergreen Lane adequate to support the anticipated traffic flow increase. Both of these access points would have to be significantly widened and reconstructed in order to provide adequate access and traffic flow to and from this redevelopment area, at significant expense to the Village.

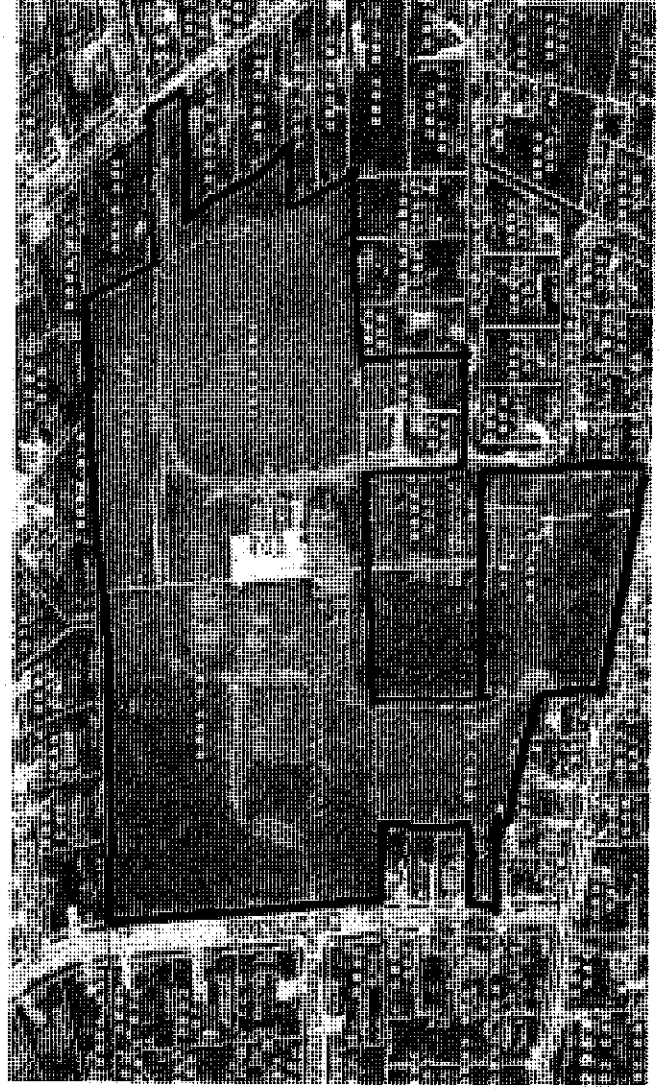
- The proposed redevelopment area contains an abandoned, unoccupied church structure which has been designated as a historical landmark. The area also includes an abandoned, unoccupied school building, accessory structures and a little used, but expansive, impervious surface parking facility. These structures, which are centrally located in an otherwise relatively open area proposed for redevelopment, arrest the possibility of any further development in this area unless they are eliminated or repurposed, both of which would only occur at great cost to the Village. Development would only occur with significant investment by the Village in reconfiguring the parking facilities, removing abandoned structures, and maintaining the historic, centrally-located church property.
  - That the condition of the church structure has deteriorated to the point of dilapidation. As noted in the attached property condition report (Exhibit 4), maintaining the historic structure in a safe condition would require extensive environmental and structural remediation. Though the Village wishes to retain this structure due to its significance in the history of the Village, and any redevelopment would need to at least retain this church structure, doing so would require extensive work to rehabilitate the structure so that it could be maintained and remediate the environmental concerns therein, including, but not limited to, the presence of asbestos.
  - That the proposed redevelopment area is an in-fill area contained within a mature, developed, single-family residential subdivision. The current configuration of the proposed redevelopment area is based on platting and subdivision decisions made obsolete by the abandonment of the church and school facilities. The outdated platting and land division of the area arrest future development in the proposed redevelopment area. Resources would have to be expended in site preparation, including a wholesale re-platting of the proposed development area to accommodate further residential development of the density desired by the Village.
  - The character and makeup of the redevelopment area, with irregularly shaped parcels, large open spaces, unused school and church structures, is such that previous proposed redevelopment plans have been rejected due to their incompatibility with the surrounding neighborhood. Proposed developments utilizing the current plat structure and accommodating existing structures have, thus far, been incompatible with the surrounding residential neighborhood.
  - The abandoned, unused school facilities and church structure contained in the proposed redevelopment area will, if not redeveloped and remediated, further deteriorate and negatively impact, health, safety and welfare of the citizens residing in the surrounding neighborhood, as well as the citizens of the Village at large.
2. In order to make the areas proposed for redevelopment suitable for development and redevelopment, the Village will need to make substantial investments to pay for the costs of property, right-of-way and easement acquisition, site preparation, installation and construction of utilities, installation of streets and related streetscape items, environmental mediation, grants and loans and other associated costs. Through the extensive initial investment in public infrastructure, rehabilitation, and acquisition of land having a historical nature, that is required in order to allow development and redevelopment to occur, the Village has determined that development and redevelopment of the area will not occur solely as a result of private investment. Accordingly, the

Village finds that, due to the reasons set forth above, that absent the use of a TIF development and redevelopment of the area is unlikely to occur.

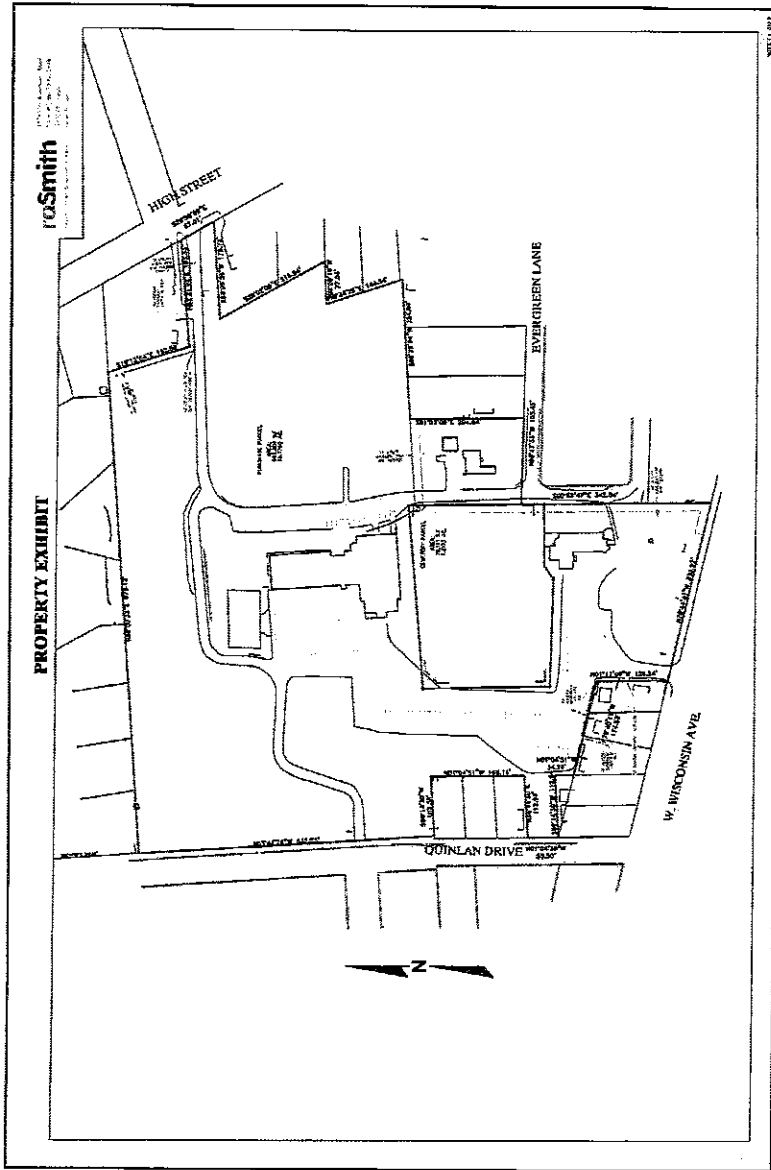
**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**Map of Proposed District Boundary**

Current Map is reflective of the 01/01/2021 parcel list.



Exh 1



**raSmith**

CREATIVITY BEYOND ENGINEERING

R.A. Smith, Inc.  
16745 W. Bluemound Road  
Brookfield, WI 53005-5938  
(262) 781-1000 | [rasmith.com](http://rasmith.com)

July 29, 2019

Mr. Scott Gosse  
Administrator  
Village of Pewaukee  
235 Hickory Street  
Pewaukee, WI 53072

Re: Queen of Apostles/Capri

Dear Mr. Gosse,

As directed by the Plan Commission, we have performed a peer review of the traffic, sanitary sewer and storm sewer systems for the proposed senior housing development proposed by Capri for the Queen of Apostles site. The traffic review has been prepared by Pat Hawley of our Traffic Division and is attached hereto. The sanitary and storm sewer reviews are below.

**Sanitary Sewer**

The following information is needed to confirm my assumptions in to generate a conclusion on the effect of the sanitary flows on the Village current system.

1. Confirmation as to where the laterals from the church, rectory and school are currently connected to the sewer mains.
2. Confirmation on the number of anticipated residents for each type of housing use. For sake of my analysis I assumed the following:
  - Cassetta's 2.0 persons per unit
  - Apartments 1.5 persons per unit
  - Senior Housing 1.5 persons per unit
  - Memory Care 1.0 persons per unit
3. Maximum number of employee's for any one shift
4. Source of the per capita flow generation amounts

Base flows used to generate flows for analysis purposes:

Residential 100 gpd/capita\* at 2.5 capita per dwelling unit (non-senior housing)  
 Senior housing 100 gpd/capita\* at either 2.0 or 1.0 depending on the type of facility within senior housing developments.  
 Commercial 1,500 gallons/acre\*\*

The development plans indicate that the sanitary sewer system will be connected to an 8-inch sewer in Quinlan Drive south of Kettlewoods Court. Flow would be north to Cheshire Lane, to a 12-inch pipe that flows easterly to High Street. At High Street, the sewer continues easterly in an 8-inch pipe located in open lands north of Pewaukee Park Hills subdivision where it connects to a 12-inch relief sewer. Based on current peak flow, there is one section of the sewer system east of High Street that is undersized. The addition of the projected flows from the Capri development will worsen the undersized pipe and result in another section of pipe to be slightly undersized. Under full development conditions that are tributary to the 8-inch pipes east of High Street, three out of the four pipes are undersized.

\* from NR 110.13 (1) (c) \*\* from NMSD 2020 Facilities report pg 3C-17

Brookfield, WI | Milwaukee, WI | Appleton, WI | Madison, WI | Cedarburg, WI | Mount Pleasant, WI  
Naperville, IL | Irvine, CA

Exh 1

Exh 2

**Conclusions:**

- Existing flows from the church, rectory and school were not directed to the same sewer basin; therefore any flows from the proposed development will be new flows into the system being analyzed.
- Sanitary sewer pipes analyzed by the developer's engineer that are located downstream of the proposed connection point on Quinlan Drive have adequate capacity to accommodate the projected sewer flows from the development.
- Current sewer flows cannot be accommodated in one section of the 8-inch pipe that extends east of High Street.
- Additional flows from the development will not be able to be accommodated in the one 8-inch pipe as well as one additional pipe section. Ultimate flows from the development and vacant lands will result in not being able to meet capacity in three 8-inch pipes downstream from the proposed development.
- The development of the capacity of the 8-inch pipes were based on invert elevations from the Village's GIS system, which are assumed to be based off of as-built drawings. Confirmation of the inverts and slopes may be an appropriate option to determine if the recorded slopes match the actual slopes.
- Solution to address this issue is to increase the 8-inch pipe size to a 12-inch pipe size.

**Storm Water Management**

We performed a technical review of the storm water management information provided. Additional information needed to complete the review as indicated below.

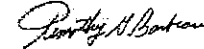
1. Sheet flow lengths should be limited to 100 feet according to NRCS guidelines. Revise calculations.
  - a. For more information, see: [https://directives.sc.eopw.usda.gov/OpenNonWebContent.aspx?content=27002\\_wba](https://directives.sc.eopw.usda.gov/OpenNonWebContent.aspx?content=27002_wba)
2. Provide calculations to show how stage-discharge relationship was developed for roof drains.
3. Specify where blue rooftop detention will be on plans. Need more details.
4. Outfall of 24" storm sewer located near outlet structure of pond. This will cause short circuiting and will not provide the necessary water quality benefits. Design is unacceptable and requires revision.
5. Provide inverts and sizes for all storm sewer and water main on plan set.
6. Outlet structure has 5" from top of outlet pipe to top of 24"x24" grate.
7. Milwaukee Winter Season range in WinSLAMM is incorrect - please refer to NR151.12(1)(b) for correct range.
8. Outlet structure was not modeled in WinSLAMM. Please revise model to include the structure.
9. Provide WinSLAMM model input and output to show how minimum amount of TSS removal needed for project. An exhibit to accompany these calculations would be beneficial or provide markup that was sent to Pete Wood.

There are some general considerations that need to be addressed prior to consideration by the Plan Commission. The proposed storm water management design results in a drainage swale sized for the 100-year storm along the north side of the proposed project. The storm water pond outlet is a 42-inch diameter pipe. Current conditions on the site allow for sheet flow runoff. The drainage swale and pipe will result in concentrated flows. The flows will likely cut a channel through the wooded area and overflow to Quinlan Drive. The conveyance system along Quinlan Drive is a 21-inch storm sewer that comes out of Kettlewoods Court and flows northerly towards Cheshire Lane. A storm sewer analysis should be provided that considers flows from the surrounding development as well as from the concentrated flows from the Capri development.

The developer should explain and show that there are no adverse runoff impacts to existing properties. Consideration should be given to extending storm sewer onto the Queen of Apostles land to pick up the storm water in the concentrated flows and getting it into the storm sewer system, if it has been appropriately sized.

Minor items to address include extension of silt fence along West Wisconsin Avenue between driveways and that all references that the design complies with City and WDNR regulations should be changed to the Village and WDNR requirements.

Should you have any questions, please contact me.



Timothy G. Barbeau, P.E., P.L.S.  
Village of Pewaukee Consulting Engineer

c: Dan Naze, Director of Public Works/Village Engineer

February 4, 2021

Village of Pewaukee  
Village Board

Re: Blight Finding Regarding TID

Dear Board Members:

I am writing this letter in my capacity as Director of Public Works for the Village of Pewaukee concerning issues of access to the former St. Mary's Church and School site in the Village. The property which is in question is generally described in the attached draft Certified Survey Map noted as Exhibit A. Use of the site is as a vacant property, inclusive of a former school building, gymnasium, rectory and church. There is also currently a cemetery which is approximately 1.8 acres in size. Access to the property is currently provided through a driveway from West Wisconsin Avenue to a parking area adjacent to the church and school; as well as another curvilinear access off of Quinlan Street to that same parking area; as well as another access off of High Street; and then an adjacent access off of Burroughs and Evergreen to the rectory and church cemetery.

In reviewing the overall size of the site in comparison to these access points, it is my opinion that the current access roadways are deficient in terms of their layout and size. Therefore, if development of this overall parcel is to occur, these access points will need to be widened and upgraded in order to properly serve traffic that might be generated through development of the site. In my opinion, the current access points, in their current form, are a limiting factor in the ability of this parcel to be developed.

Sincerely,

VILLAGE OF PEWAUKEE.

Dan Naze  
Director of Public Works

DN/jb  
Enc.

Property Condition Assessment Report



St Mary's Catholic Church  
449 West Wisconsin Avenue  
Pewaukee, Wisconsin 53072

Prepared for:



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Suite 400  
Waukesha, WI 53186

Prepared by:



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VP REGIONAL PRACTICE LEADER  
PCA REPORT REVIEWER

TRC Project Number 337553  
May, 2019

Exh 3

Exh 4

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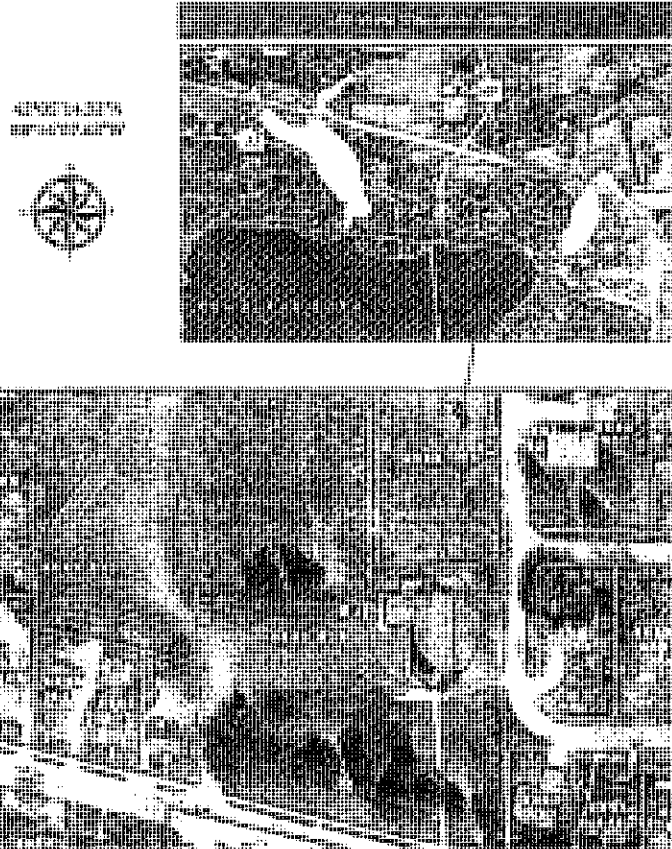
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Site Location



**1.0 EXECUTIVE SUMMARY**

**1.1 Subject Property Description**

TRC Environmental Corporation (TRC) has performed a Property Condition Assessment (PCA) of the parcel and improvements listed in the following table defined as the subject property. The assessment was performed in general accordance with ASTM E2018-15 Standard Guide for Property Condition Assessments: Baseline Property Condition Assessment Process (ASTM E2018) or as specifically required by Capris Communities (Client).

The purpose of this PCA was to observe and document readily-visible materials and building system deficiencies that might significantly affect the value of the subject property and determine if conditions exist which may have a significant impact on the proposed option to upgrade the building, buildings systems and generally make improvements with the purpose of facilitating ongoing operation.

Subject Property Data	
Building Name	St. Mary's Catholic Church
Address	449 West Wisconsin Avenue
City, County, State Zip Code	Pewaukee, Waukesha, Wisconsin 53072
Current Use or Type	Agape Community Church worship space
Site Area (acres)	1.92 per Google Earth (out of the 16 acres for the site)
Parcel Identification Number	PWV 0893 923 per Waukesha County Land Information System
Number of Buildings	One (1)
Building Area (gross square feet)	6,000 GSF
Building Area (rentable square feet)	2,000 GSF (approximations using Google Earth)
Number of Stories	1-story
Subgrade Spaces	Below original building and addition
Parking Provided	30 on-site spaces per TRC physical count
Zoning District	Not given. Surrounding is zoned residential.
FEMA Designated Flood Zone	The subject property is not located within a FEMA designated flood zone.
Year Built	1958
Additional Phases	1959
Significant Renovations	No recent activity was reported
Site Visit Date	April 9 <sup>th</sup> , 2019
Weather Conditions	40-degrees, windy with sunny skies
TRC Site Assessors	Dale Kent and Doug Ernst, PE
Site Escort	Wayne Wierzema, Senior VP of Development with Capris Communities

**1.2 General Physical Condition**

Based on the systems and components observed during the site visit, the subject property appears to be in overall fair condition. The subject church building was being used by Agape Community Church for weekly services and by a local Boy Scout Troop.

**1.3 Summary of Cost Data**

TRC developed opinions of cost for recommended remediation of observed physical deficiencies within the subject property as further referred in Section 6.0 of this report. The following table summarizes the opinions of costs identified during the site walk through.

ITEM	PROPERTY COMPONENT	QUANTITY	IMMEDIATE COST
<b>Site Improvements</b>			
1.	Excavate and install exterior drain tile.	5500 ft. over 160 lineal feet	\$80,000.00
<b>Building Enclosure</b>			
1.	Masonry: 1. Repair/replace below grade bricks/concrete. 2. Tuckpointing and chimney repair.	\$31.25/sqft over 1,600 sqft of surface area \$12/sqft over 5,000 sqft of surface area	\$50,000.00 \$65,000.00
2.	Windows: Replace lower level (basement) window systems.	15	\$15,000.00
3.	Roofing: Replace steeple roofing and Office roofs.	Steeple: \$80/sqft over 730 sqft surface area. Office: \$10/sqft over 760sqft surface area	\$57,600.00 \$7,600.00
<b>Vertical Transportation</b>			
1.	Elevators: install new to meet ADA requirements, ADA Code Compliance.	1	\$170,000.00
1.	Interior: Alter anteroom floor – adjust for elevations.	At \$40/sqft over 2,125 square feet /surface area.	\$85,000.00
2.	Exterior: Install access ramps.	At \$1,250/ft. over 80 lineal feet.	\$100,000
<b>Environmental – Mold, Lead, Asbestos</b>			
1.	Lead Paint Abatement in the original church building.	At \$20/sqft over 11,250 square feet/surface area.	\$225,000.00
2.	Plaster replacement due to mold remediation.	At \$46.66/sqft over 11,250 sqft/surface area.	\$525,000.00
3.	Removal and remediation of mold contaminated dry wall.	At \$21.34/sqft over 1,640 sqft/surface area.	\$33,000.00
<b>Interior Elements</b>			
1.	Two new bathrooms to meet building code.	@ \$35,000 each	\$70,000.00
<b>Total Immediate Costs</b>			<b>\$1,465,000.00</b>



## 2.0 PURPOSE AND SCOPE

TRC understands that the Client's purpose for having the PCA performed is to conduct a baseline survey of the general physical condition of select improvements located on the subject property.

Contract Summary	
Client Name	Capns Senior Communities
Authorizing Person's Name	Wayne Wiertzema
Authorizing Person's Title	Senior Vice President of Development
Authorization Date	04/08/19

TRC performed a PCA of the subject property that generally conforms to the scope and limitations of ASTM E2018 or as specifically required by the Client. The assessment included a walk-through survey, and interviews with person(s) knowledgeable with the site. TRC utilized experience and judgment to evaluate items observed and to assign condition assessment to them. The condition descriptions used in this report are described below:

- **Good:** Component or system is sound and performing its function. It may show signs of normal wear and tear commensurate with its age and some minor remedial work may be required.
- **Fair:** Component or system is performing adequately at this time; however, exhibits deferred maintenance, evidence of previous repairs, or workmanship is not in compliance with commonly accepted standards, or is approaching the end of its typical expected useful life. Repair or replacement is required to prevent further deterioration, restoration to good condition, and prevent premature failure.
- **Poor:** Component or system has either failed or cannot be relied upon to continue performing its original function as a result of having realized or exceeded its typical expected useful life, excessive deferred maintenance, a state of disrepair, or inherent design deficiency, or workmanship. Present condition could contribute or cause the deterioration of contiguous elements or systems. Repair or replacement is required.

TRC utilized information gathered about the property to estimate the EUL and RUL of items observed, and defined as follows:

- **Expected Useful Life (EUL):** an estimate of the average amount of time, in years, that an item, component or system may function when installed new, assuming routine maintenance is practiced.
- **Remaining Useful Life (RUL):** a subjective estimate of the number of remaining years that an item, component or system is able to function in accordance with its intended purpose before warranting replacement, based upon observation or average estimates of similar items, components, or systems or a combination thereof.

TRC utilized information and the estimated age to develop a list of recommended remedies or physical needs for the property. These needs are typically segregated into the following two categories:

- **Immediate Costs:** Items that require immediate action as a result of potential unsafe existing materials or conditions; building or fire code violations; and conditions that if left unremedied have the potential to result in or contribute to critical element of system failure within one year or will most probably result in a significant escalation of its remedial cost.
- **Over the Term Costs:** Items requiring repair and replacement which are beyond the scope of regular maintenance, but which are considered necessary to maintain the overall condition of the property.

For this report, the client has requested TRC limit our reporting to Immediate Costs

### 3.0 SYSTEM DESCRIPTION AND OBSERVATIONS

#### 3.1 Overall General Description

The subject property is located on the north side of West Wisconsin Avenue within the city limits of Pewaukee, Wisconsin. The subject property is improved with a single-story church and office/annex. The subject property was currently being used by the Agape Community Church at the time of the site visit.

There are two (2) main entries to the building. Neither point of entry provides ADA access.

Site improvements include surface parking for employees and parishioners. According to Waukesha County, the subject property is a single "L" shaped parcel that includes an adjacent cemetery to the northwest.

The north side of the site is bordered by the now closed Queen of Apostles Catholic School and an additional cemetery. The east and west sides of the site are bordered by residential development. The south side of the site is bordered by Wisconsin Avenue.

#### 3.2 Site Improvements

##### 3.2.1 TOPOGRAPHY

Not part of this report.

##### 3.2.2 STORM WATER DRAINAGE

Not part of this report.

##### 3.2.3 VEHICULAR ACCESS, PAVING, CURBING, AND PARKING

Not part of this report.

##### 3.2.4 FLATWORK, WALKWAYS, GRADE-LEVEL STEPS, AND RAMPS

As they relate to ADA compliance; building entrance flatwork and pedestrian walkways consist of poured-in-place concrete construction. The flatwork and walkways at the site appear to be in overall fair condition. Based on Google Earth imagery, concrete walkways throughout the site total approximately 1,758 square feet. Concrete deficiencies were observed at both entrances and are associated with the respective concrete grade level steps. The conditions will be necessarily be resolved during the installation of new ADA compliant rampways.

Grade-level steps are provided from the adjacent west parking area to the west entry walkway of the office annex. The step construction consists of cast-in-place concrete with painted wrought iron handrail assemblies. The concrete steps and handrail assembly appear to be in overall good condition.

No pedestrian walkway ramps were observed at the time of the site visit.

##### Recommendations:

- Install new ADA compliant rampways. (Immediate cost)

#### 3.2.5 LANDSCAPING AND SITE APPURTENANCES

Not part of this report.

#### 3.2.6 RECREATIONAL SITE AMENITIES

No recreational site amenities were observed during the site visit.

#### 3.2.7 SPECIAL UTILITY SYSTEMS

No material special on-site utility systems such as water treatment systems, wastewater treatment systems, or special power generation systems were observed or reported at the time of the site visit.

#### 3.2.8 STRUCTURAL FRAME AND BUILDING ENVELOPE

No original construction drawings of the building were available for review at the time of the site visit.

#### 3.2.9 FOUNDATION AND FLOOR SLABS

Foundation systems for these building types and geographic area are typically supported with cast-in-place shallow perimeter concrete grade beams, and concrete footings at interior column locations. Floor construction appears to consist of concrete slab-on-grade.

Substructure construction could also not be verified while on-site due to hidden conditions. Observed visible floor finishes generally appear to be level with no unusual or significant displacement.

##### Recommendations:

No necessary repairs were identified at the time of the site visit.

#### 3.2.10 BUILDING FRAME

The building structure appears to consist of a multi-wythe Lannon stone construction including perimeter and interior heavy timber wood columns, wood hammer beams in the arches, and timber joists supporting the wood plank roof deck. The perimeter building walls are assumed to include wood studs with stone veneer. In the attic space, scissor trusses are arranged in a diamond configuration with wooden plaster strapping affixed to horizontal joists. The building frame appears to be in overall good condition. There were no visible structural deficiencies observed that require repair.

##### Recommendations:

No necessary repairs were identified at the time of the site visit.

#### 3.2.11 EXTERIOR FACADES AND WINDOWS

The exterior facades of the building are generally constructed with coarse rock-faced Lannon stone in the solar method at the main church entryway, with the main body of the church being bed-faced Lannon stone attached in the random Ashlar fashion. Similarly, the office annex addition features random Ashlar smooth cut Lannon stone fashioned in the random Ashlar pattern. At the north end of the church building there is a common brick chimney of no significant architectural importance. In the fenestration openings there are wood window sections with insulated glazing units, wood framed stained glass windows and wood framed hollow metal doors. The exterior walls of the building terminate below the roof line behind a curvilinear soffit moulding with the gutters mounted flush to the top of a freeze board. On the gable ends of the church building there is additional decorative wood soffit containing a similar curvilinear

profile. Exterior walls of the office annex terminate beneath a typical contemporary soffit and freeze board arrangement.

The wood-framed window and entry systems appear to be in overall good condition. However, the basement windows are in relatively poor condition due to moisture damage. There is exterior wood perimeter case moulding surrounding the main entrance that is in fair to poor condition. Observation showed severely deteriorated wood: splitting, and water damaged at the interface of wood moulding and concrete. The wood soffit elements are generally in good condition the exception being the gable ends where severe peeling of the paint was observed. In addition, the Cedar vented belfry openings showed were observed to be in poor condition with signs of wood weathering/deterioration due to severe peeling paint.

The exterior stone facades appear to be in overall fair condition. General tuckpointing is recommended throughout the field of the façade, with the chimney requiring more acute attention. Sealants throughout the building facades appear to be in overall good condition. Costs associated with repairing the belfry openings are included in the steeple roof repairs. An opinion of costs associated with replacing the basement windows are included in the table found in Section 1.3 Summary of Cost Data. Other costs fall below the given threshold of \$3,500.00 and are not itemized in this report.

**Recommendations:**

- Repoint deficient masonry joints using a lime rich-low Portland content mortar. TRC recommends using lime-rich pre-manufactured mortar mixes over hand mixing. In addition, TRC recommends the testing of existing historic mortars to determine a match with the dominant color and correct ratio of lime to Portland to sand. Test using ASTM C1324 Standard Test Method for Examination and Analysis of Hardened Masonry Mortar.
- Replace basement windows.
- Repair and paint the Cedar belfry openings.
- Repair and paint the wood perimeter case moulding around the main entrance.

**3.2.12 BALCONIES, EXTERIOR STAIRS, AND ELEVATED WALKWAYS**

No balconies, exterior stairs, or elevated walkways were observed during the site visit.

**3.2.13 ROOFING SYSTEMS AND DRAINAGE**

The main roof system on the building consists of a steep-sloped granule surfaced 3-tab asphalt shingle with copper gutters and downspouts. The main church building roof slopes to external gutters which are piped to out into the front lawn via downspouts on the west elevation and discharge out over the lawn on the east elevation. (The outlet onto the lawn was plugged by the current tenant which most likely caused the recent basement flooding.) On the office annex, the roof system consists of a similar more moderately sloped shingle system with gutters on the south side of the roof discharging into the municipal storm sewer system and the north side gutters discharging out onto the lawn. The EUL of this type of shingle system is typically 15 years depending upon the quality of installation and how well it is maintained. Observations showed wind damage to the south slope of the office annex roof due to substandard installation methods and severe weathering of the shingles found on the steeple. TRC recommends full tear-off and replacement of these roofs.

No warranty information was received prior to issuing this report. No active roof leaks were observed or reported at the time of the site visit. An opinion of costs associated with replacing these roofs are included in the table found in Section 1.3 Summary of Cost Data.

There is a secondary roof system on the main church building entry vestibule that consists of a low-sloped fully adhered EPDM with tapered roofing insulation. This roof slopes to an internal drain system and through the small stone.

No warranty information was received prior to issuing this report. No active roof leaks were observed or reported at the time of the site visit. The EUL of an EPDM roof system is typically 20-years depending on how well it is maintained. The EPDM roof system appears to be in overall good condition. Based on the assumed age, current condition, and EUL, replacement is not anticipated during the term.

During TRC's time on site, it was observed that below grade masonry associated with the original church building is in poor condition. Water discharged from roofing downspouts has caused significant deterioration to below grade masonry and may be causing an unstable condition. TRC recommends excavating down to the footings, inspecting and repairing deteriorated masonry followed by the installation of below grade waterproofing and a new drain tile system to direct water away from the building. An opinion of costs associated with replacing these roofs are included in the table found in Section 1.3 Summary of Cost Data.

**Recommendations:**

- Replace the steeple and office annex roofs.
- Repair/replace below grade masonry and install new drain tile

**3.2.14 MECHANICAL AND ELECTRICAL SYSTEMS**

**3.2.15 PLUMBING, DOMESTIC HOT WATER, AND SEWER SYSTEMS**

Not part of this report.

**3.2.16 HEATING, VENTILATION, AND AIR CONDITIONING**

Heating, ventilation, and air conditioning (HVAC) throughout the building interior is provided via two Trane XE80 high efficiency gas furnace units installed circa 1996. These units are controlled with two thermostats located just outside the kitchen area. In addition, two Series 100 gas-fired heating boilers manufactured by Vaillant and installed in 1989 supply heat to the main church building. (It should be noted the Vaillant is a European manufacturer that pulled out of the U.S. market in 1995.) All of these systems are located in the mechanical room. Insulated hot water piping is distributed throughout the building to each of the VAV control units. Conditioned air is supplied through sheet metal ducting and ceiling diffusers. There were no A/C units observed.

The EUL of gas-fired boilers generating hot water for building heat is typically 30-years depending on how well they are maintained. Based on the age, current condition, and EUL, replacement is not anticipated during the term. A current inspection sticker was observed mounted to the boiler.

The EUL of gas-fired furnaces generating hot air for building heat is typically 50-years depending on how well they are maintained. Based on the age, current condition, and EUL, replacement is not anticipated during the term.

**Recommendations:**

- Continue with maintenance and inspection.

### 3.2.17 ELECTRICAL

Not included in this report

### 3.2.18 VERTICAL TRANSPORTATION

No vertical transportation or elevators were observed during the site visit. In order to achieve the client's accessibility goals, TRC recommends installing new two-stop hydraulic elevator, an elevator pit to accommodate the hydraulic workings and an elevator room. An opinion of costs associated with the installation of a new hydraulic elevator system are included in the table found in Section 1.3 Summary of Cost Data.

### 3.2.19 LIFE SAFETY AND FIRE PROTECTION

#### 3.2.20 FIRE SUPPRESSION SYSTEMS

- Not included in this report

#### 3.2.21 ALARM SYSTEMS

- Not included in this report

#### 3.2.22 INTERIOR ELEMENTS

#### 3.2.23 COMMON AREAS

The subject building is a single tenant occupancy therefore no common areas are included.

#### 3.2.24 INTERIOR SPACES

Typical interior spaces include finishes consisting of acoustical ceiling systems, recessed light covers, vinyl tile, painted drywall partitions and painted plaster. Interiors observed, appear to be in overall fair condition with some notable exceptions due to the suspected presence of mold and lead in the plaster of the church building and mold in some of the drywall located in the basement under the main building. Further, TRC observed significant cracking in the plaster walls and ceiling of the church building. The suspected environmental conditions will

It is TRC's opinion that the cracks in the plaster are not related structural movement of the building as it sits today. They are most likely associated with the addition to the basement during the 1953 construction. Plaster of this kind is applied by craftsman to a lightweight wood lattice system. Once the plastering is complete, it in effect becomes monolithic and quite rigid. From the arches out into the field of the ceiling the entire plaster system is supported by the wood lattice system which is mechanically secured to hidden timbers using nails. Due to the weight of cured plaster, additional reinforcement is needed in the transition from vertical wall out into the arches to prevent collapse of the ceiling. This is usually accomplished in several ways using a combination of heavy gauge wire, galvanized rod and vertical wood slats secured to horizontal trusses within the scissor truss system in the attic space. When the building was jacked up to facilitate installation of the new basement and it's supporting foundation and walls; it is likely there was some minor sway in the ceiling and arches, some of the vertical reinforcement may have broken, stretched or become miss aligned and it is also very likely there was some settling of the new foundation after the church building was lowered. These were all possible contributing factors to the cracking observed in the plaster, particularly the plaster was not supported diagonally in the attic space

or at the transition from vertical to arches and ceiling. Due to the nature of the client's requirements for immediate cost, TRC does not recommend further investigation. Suspected mold and lead contamination are addressed in the following sections: 3.2.25 Limited Visual Lead Assessment and 3.2.26 Limited Mold Assessment.

#### 3.2.25 LIMITED VISUAL LEAD ASSESSMENT

As part of performing this PCA, visual observations for overt signs of suspect lead contamination were also performed. These observations were not performed to discover all affected areas, nor were areas of the subject property observed specifically for the purpose of identifying areas of suspected lead contamination. The subject property areas viewed were limited to those necessary to perform the primary scope of this PCA.

The assessment did not investigate other contaminants in or around any other structure, and our service was not designed or intended to prevent or lower the risk of the occurrence of the amplification of the same. The Client acknowledges that lead containing materials are ubiquitous to the nature of construction materials used at the time of the building's construction.

Visual indications of significant suspect lead contamination were not observed during the site visit. An opinion of costs associated with potential lead abatement are included in the table found in Section 1.3 Summary of Cost Data.

#### Recommendations:

Remove and abate suspected lead paint from plaster surfaces. An opinion of costs associated with lead abatement is included in the table found in Section 1.3 Summary of Cost Data.

#### 3.2.26 LIMITED VISUAL MOLD ASSESSMENT

As part of performing this PCA, visual observations for overt signs of suspect mold growth were also performed. These observations were not performed to discover all affected areas, nor were areas of the subject property observed specifically for the purpose of identifying areas of suspect mold growth. The subject property areas viewed were limited to those necessary to perform the primary scope of this PCA.

The assessment did not investigate other biological contaminants in or around any structure, and our service was not designed or intended to prevent or lower the risk of the occurrence of the amplification of the same. The Client acknowledges that mold is ubiquitous to the environment with mold amplification occurring when building materials are impacted by moisture. The Client further acknowledges that site conditions are outside of TRC's control, and that mold amplification will likely occur, or continue to occur, in the presence of moisture. As such, TRC cannot and shall not be held responsible for the occurrence or recurrence of mold amplification.

Visual indications of significant suspect microbial growth were not observed during the site visit. An opinion of costs associated with potential mold abatement are included in the table found in Section 1.3 Summary of Cost Data.

#### Recommendations:

Due to repeated flooding of the church basement area TRC suspects there to be mold contamination within the basement wall assemblies. TRC recommends removal and replacement of the drywall as part of the mold abatement process. In addition, TRC suspect mold contamination exists within the wall

cavity behind the plaster due to past roof and wall leaks. Accordingly, TRC recommends removal and replacement of the plaster as part of any mold abatement.

### 3.3 Limited Visual ADA Tier I Accessibility Assessment

As defined under Title III of the ADA, existing facilities considered to be "public accommodations" must take steps to remove architectural and communication barriers that are deemed "readily achievable" under the retroactive requirements. Compliance with the 2010 ADA Standards for Accessible Design is required for new construction and alterations on or after March 15, 2012.

This assessment included a limited review of the "common" interior and exterior path of travel areas of the property. Significant items of non-conformance, if any, are noted without regard as to whether or not they are "readily achievable." Factors to be considered in determining whether or not an action is readily achievable include the nature and cost of the action, the number of person employees at the subject property and the financial resources available of ownership. The decision as to which actions are to be undertaken as readily achievable is to be determined by building owner in consultation with its accountants, attorneys and design/construction professionals. Vehicle parking issues were not part of this report.

It was observed that exterior entrances lack proper ADA accessibility ramps.

Public restrooms observed appear to be generally noncompliant with ADA requirements.

It was observed that there are varying floor elevations in the transition from the main church building to the coffee lounge and to restrooms and parish kitchen. This condition is not ADA compliant. An opinion of costs associated with adjusting these floor elevations to meet ADA requirements are included in the table found in Section 1.3 Summary of Cost Data.

#### Recommendations:

- Install two new ADA compliant restrooms. (Immediate Cost)
- Build up floor in the ante room/church to eliminate the change in elevation from church to coffee lounge area.

### 3.4 Additional Consideration

An option to the installation of new bathrooms, an elevator and reconfiguring the floor elevations is to move all services to the main floor level. This would necessarily involve putting an addition on the building at a cost of \$300,000 to \$400,000.00.

## 4.0 DOCUMENT REVIEW AND INTERVIEWS

TRC requested the following information regarding the subject property from various sources. Copies received are included in the Appendices of this report.

Document	Resource	Comments
TRC PCA Pre-Survey Questionnaire	Client	Received
Record Construction Drawings	Current Owner	Not Provided
Maintenance Logs	Current Owner	Not Provided
Prior PCA Report	Current Owner	Not Provided
Certificate of Occupancy	N/A	N/A
Building, Fire, Life Safety, Zoning Violations	Local Municipal Fire, Building, and Zoning Departments	No outstanding zoning code violations were reported. No reply regarding outstanding building and fire code violations were received prior to issuing this report.
Appraisal or ALTA/ACSM Land Title Survey	Current Owner	Not Provided
Warranty Information	Current Owner	Not Provided
Planned Capital Expenditures	Current Owner	Not Provided
Repair and/or replacement cost information (prior 3-years)	Current Owner	Not Provided
Pending proposals or contracts for material repairs/replacements	Current Owner	Not Provided
ADA Accessibility Survey	Current Owner	Not Provided
Rent Roll	Current Owner	Agape Community Church

TRC interviewed or communicated with the following parties during the site visit and/or preparation of the report for the subject property:

Interview Summary			
Name	Title/Function	Affiliation	Phone
Wayne Wiertzema	Senior Vice President Development	Capris Communities	262.289.2709

## 5.0 OPINIONS OF COSTS

TRC developed opinions of cost for recommended remediation of observed physical deficiencies. The opinions of cost presented within this report are based on construction costs developed by construction resources such as Marshall & Swift, RS Means, TRC's database of experience with past costs from similar projects, city cost indexes, consultations with local specialty contractors, client-provided information, user provided unit costs, and assumptions regarding future economic conditions.

Actual cost estimates are determined by many factors including but not limited to: choice and availability of materials, choice and availability of a qualified contractor, regional climate zone, quality of existing materials, site compatibility, and access to the subject property and building.

In addition, opinions of costs are based solely on replacement of "like-kind" materials and do not account for soft costs. Recommended remediation does not anticipate an upgrade or improvement of existing conditions, unless specifically indicated otherwise.

Some cost items are determined based upon the estimated useful life (EUL) of a system or component, the apparent effective age, and the remaining useful life (RUL). Factors that may affect the age and condition of a system include, but are not limited to, the frequency of use, exposure to environmental elements, quality of original construction and installation, and amount of maintenance provided. Based on these factors, a system may have an effective age that is greater or less than its actual chronological age.

This report does not identify minor, inexpensive repairs or maintenance items that are clearly part of the property owner's operating budget or taken care of during typical building maintenance. This report excludes costs for systems or components that are reported to be a tenant responsibility to maintain and/or replace. This report also excludes costs that are below \$3,500 or the reporting threshold established by the engagement agreement, unless determined to be an immediate cost.

## 6.0 QUALIFICATIONS

Services performed by TRC were not intended to be technically exhaustive. There is a possibility that even with proper application of methodologies, conditions may exist on the property that could not be identified within the scope of the assessment(s) or that were not reasonably identifiable from the available information.

The services and report are not an instrument of professional architectural or engineering service, and TRC did not develop architectural or engineering findings, conclusions or recommendations, nor did TRC verify designs or design capacities. TRC's observations, opinions, and recommendations have been developed under the time and budgetary constraints inherent in ASTM E2018 and the authorized scope of services. Opinions do not warrant or guarantee the performance of any building components or systems or adequacy of design.

In accordance with guidelines set forth by ASTM E2018 current to the issuance of this report and subject to the limitations stated, TRC's report is based on a limited, ground level (except where otherwise explicitly indicated) visual inspection of the property. TRC did not perform any exploratory probing or discovery, perform tests, operate any specific equipment, or take measurements or samples. The PCA is not a building code, safety, regulatory, or environmental compliance inspection.

No PCA can wholly eliminate uncertainty regarding repair and maintenance needs in connection with the property. The PCA was intended to reduce, but not eliminate uncertainty regarding such needs. The observations and recommendations presented in this report are time dependent, and conditions will change. This report speaks only as of its date. Resumes for the site assessor and report reviewer are available upon request.

As part of performing this PCA, visual observations for overt signs of suspect mold growth were also performed. These observations were not performed to discover all affected areas, nor were areas of the subject property observed specifically for the purpose of identifying areas of suspect mold growth. The subject property areas viewed were limited to those necessary to perform the primary scope of this PCA.

The assessment did not investigate other biological contaminants in or around any structure, and our service was not designed or intended to prevent or lower the risk of the occurrence of the amplification of the same. The Client acknowledges that mold is ubiquitous to the environment with mold amplification occurring when building materials are impacted by moisture. The Client further acknowledges that site conditions are outside of TRC's control, and that mold amplification will likely occur, or continue to occur, in the presence of moisture. As such, TRC cannot and shall not be held responsible for the occurrence or recurrence of mold amplification.

Visual indications of significant suspect microbial growth were not observed during the site visit.

## 7.0 LIMITING CONDITIONS

ASTM E2018 sets forth limitations in the assessment process. Limitations to the accuracy and completeness of this report are tabulated as follows:

- **Access Limitations** - No access limitations were encountered during our site visit.
- **Physical Obstructions to Observations** - Portions of the building may not have been fully observable due to stored material, furniture, equipment, height of building exterior, or interior finishes at the time of our site visit.
- **Outstanding Information Requests** - Information requested from the local municipality or others may not have been received in time for this report. If information received from these sources will alter the conclusions of this report, an addendum will be issued.

TRC performed the PCA using methods and procedures and practices generally conforming to the ASTM E2018 guide. The guide describes these methodologies as representing good commercial and customary practice for performing a PCA of a parcel of property. Findings and conclusions derived from the methodologies described in the guide contain all of the limitations inherent in the methodologies that are referred to in the guide.

TRC warrants that the findings contained in this report have been prepared in general accordance with accepted professional practices at the time of report preparation as applied by similar professionals. Future changes in standards, practices, or regulations cannot be anticipated and have not been addressed.

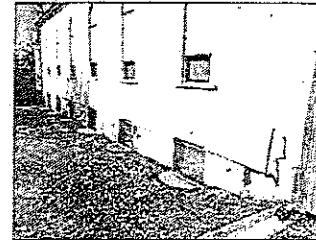
The methodologies include reviewing information provided by other sources. TRC treats information obtained from the record reviews and interviews concerning the property as reliable and the guide does not require TRC to independently verify the information. Therefore, TRC cannot and does not warrant or guarantee that the information provided by these other sources is accurate or complete. No other warranties are implied or expressed.

### Reliance and Use By Others

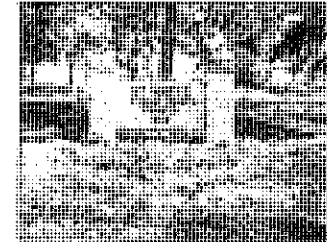
This report has been prepared to assist the Client in evaluating the condition of various building components at the property referred to in the report. This report may be relied upon by the Client, and any one or more of its affiliates, successors, and/or assigns.

This report speaks only as of its date.

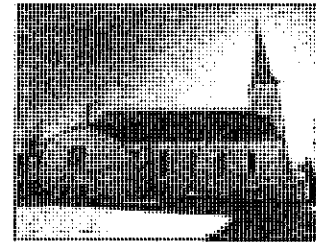
## 8.0 PROPERTY PHOTOGRAPHS



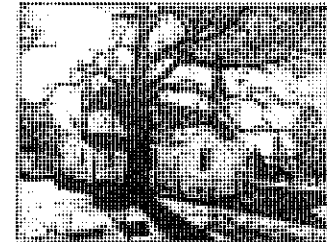
1. East elevation of main church building



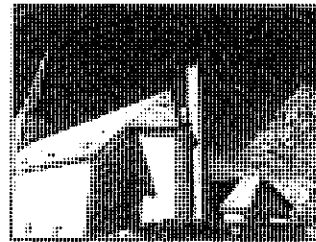
2. View from lawn near Wisconsin Avenue



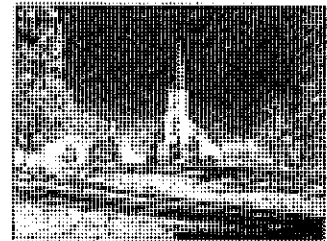
3. West elevation.



4. North elevation view from the west



5. North elevation view from the east.



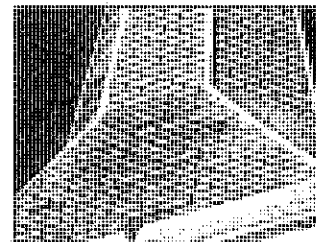
6. South elevation.



7. At annex entrance.



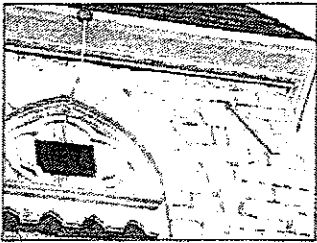
8. West elevation of church building.



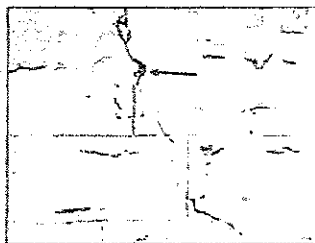
13. Shingle deterioration on steeple, east elevation.



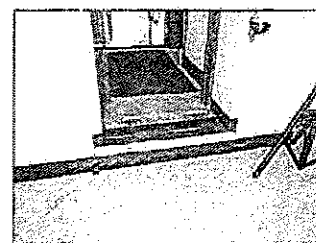
14. Annex entrance, south elevation. Note the tip hazard painted yellow.



9. Steeple mortar deficiencies.



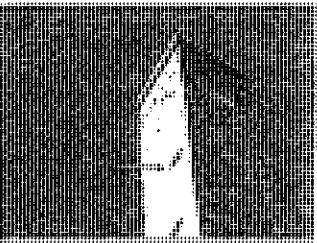
10. Step cracking in mortar at west elevation.



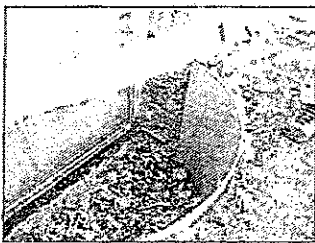
15. Change in floor elevation from church into annex.



16. Interior view looking south.



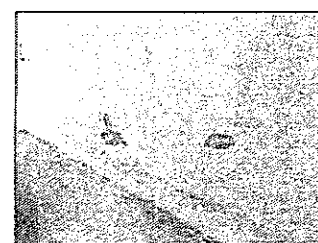
11. Masonry deficiencies on chimney.



12. Rotted wood window, West elevation of church.

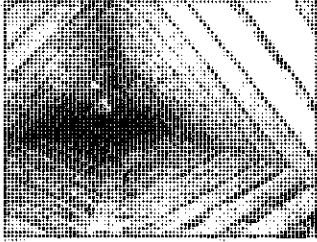


17. Typical of cracks in plaster.

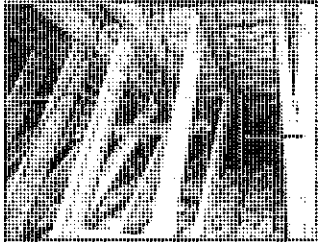


18. Typical of paint peeling from plaster surface.

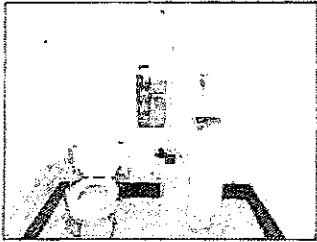




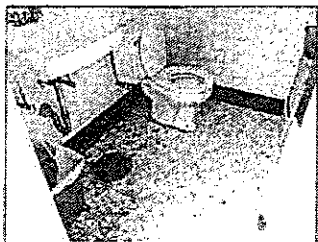
19. Scissor trusses in the church attic



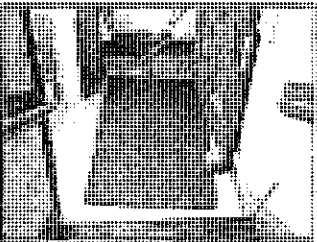
20. View into attic perimeter. Note vertical plaster supports



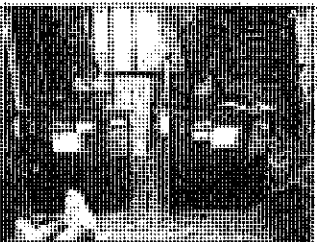
21. Existing men's room.



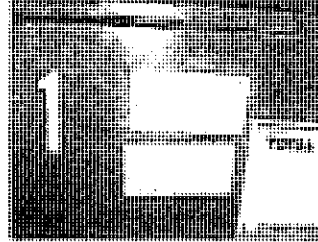
22. Existing ladies room.



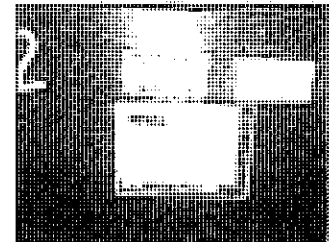
23. Annex entry is below floor line of church (foreground) with stairs leading to basement.



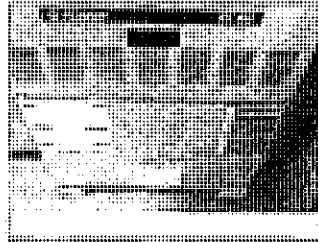
24. Mechanical room, twin ValPant boilers.



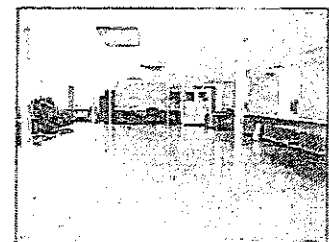
25. Boiler #1 inspection date



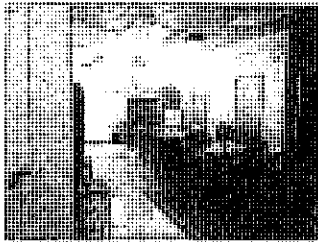
26. Boiler #2 inspection date.



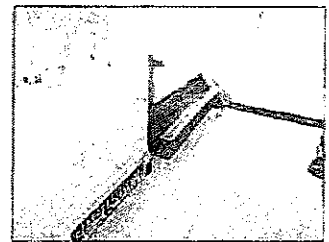
27. TRANE gas fired furnaces (2).



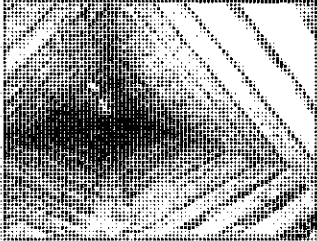
28. Basement area main church



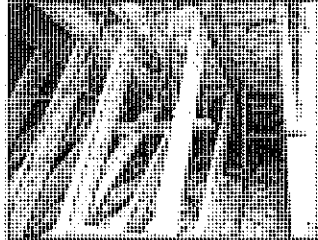
29. Annex basement area.



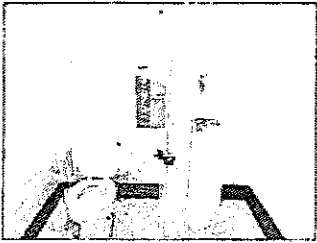
30. Stairs as only access to basement level.



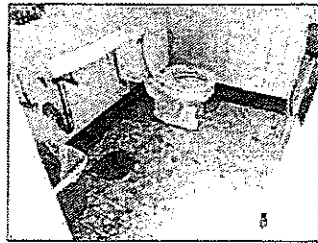
31. Scl's or trusses in the church attic.



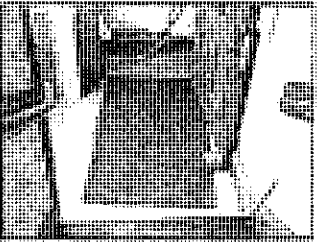
32. View into attic perimeter. Note vertical plater supports.



33. Existing men's room.



34. Existing ladies' room.



35. Annex entry is below floor line of church (foreground) with stairs leading to basement.

**Project Plan & District Boundary  
Tax Incremental District No. 3  
in the  
VILLAGE OF PEWAUKEE, WISCONSIN**



January 22, 2021 DRAFT

Organizational Joint Review Board Meeting Held.....	February 9, 2021
Public Hearing Held.....	February 11, 2021
Adopted by Planning Commission.....	February 11, 2021
Adopted by Village Board.....	March 2, 2021
Approved by Joint Review Board.....	March 9, 2021

Prepared by:



Robert W. Baird & Co.  
Public Finance  
777 E. Wisconsin Ave.  
Milwaukee, WI 53202  
800.792.2473

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## Village of Pewaukee Officials

### Village Board

Jeff Knutson	Village President
Heather Gergen	Village Trustee
Ed Hill	Village Trustee
Tony Hopkins	Village Trustee
Craig Roberts	Village Trustee
Bob Rohde	Village Trustee
Kevin Yonke	Village Trustee

### Village Staff

Scott Gosse	Administrator
Cassie Smith	Clerk
Daniel Naze	Director of Public Works/Engineer
Mary Censky	Planner
Mark Blum	Attorney

### Planning Commission

Jeff Knutson (Chairperson)	Cheryl Mantz
Craig Roberts (Trustee)	Eric Rogers
Jim Grabowski	Joseph Zompa
Ryan Lange	

### Joint Review Board

Jeff Knutson	Village Representative
Andrew Thelke	Waukesha County
Jane Kittel	Waukesha County Technical College
John Gahan	Pewaukee School District
Chuck Nichols	Public Member

## Introduction and Description of District

The Village of Pewaukee (the "Village") is located in Waukesha County, approximately 20 miles west of Milwaukee and 60 miles east of Madison. The Village encompasses an area of approximately four square miles and is bordered by Pewaukee Lake, one of the area's largest lakes. State Highways 16 and 190 provide easy access to the Village. The Village provides police and fire protection, municipal water, sanitary sewer and storm sewer services and maintains two large parks and a public beach on Pewaukee Lake. These amenities allow the Village to flourish as a development area for residential, business, commercial retail, office, and industrial development.

The Village has a history of successful economic development programming using Tax Incremental Financing ("TIF") by providing public improvements to encourage and promote industrial, commercial and residential development and redevelopment. The goal is to increase the tax base, to provide for and preserve employment opportunities within the Village, and to create and enhance tourism opportunities with the area and region. The Village works with developers and property owners to provide infrastructure improvements and/or cash grants as incentives for development and/or redevelopment.

Tax Incremental District No. 3 (the "TID") is being created by the Village under the authority provided by Wisconsin Statute Section 66.1105. The TID is created as a "Blight District" based on the findings that at least 50 percent of the TID is a blighted area. A blighted area is property which is by reason of dilapidation, deterioration, age or obsolescence, inadequate provisions for ventilation, lights, air or sanitation, high density of population and overcrowding, or the existence of conditions, which endanger life or property by fire and other causes. The area is predominantly open and which because of obsolete platting, diversity of ownership, deterioration of structures or of site improvements or otherwise, substantially impairs or arrests the sound of growth of the community. The primary focus of this district is to promote the redevelopment of the former St. Mary's School site, former Rectory and surrounding parking lot and green space as single-family housing along with reselling the St. Mary's Church to an entity that would use and maintain the building which has been designated as a local historic landmark. The maximum life (absent extension) of the TID is 27 years from the date of adoption.

The Village anticipates various public improvement project cost expenditures of approximately \$3,335,000 during the TID's 22-year expenditure period. Proposed public project improvements may include, but not limited to infrastructure, professional and organizational services, administrative costs, and finance costs. As part of the Project Plan, Developer Incentives may be provided by the Village to developers of property within the TID in the form of Developer Funded Grants".

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

As a result of the creation of this TID, the Village projects a preliminary and conservative cash flow analysis indicating \$9,973,631 in increments. The TID increment will primarily be used to pay the debt service costs of the TID, and project development incentives. The Village projects land and improvement values (incremental value) of approximately \$23,690,000 will be created in the TID by the end of 2048. This additional value will be a result of the improvements made and projects undertaken with the TID.

Maps depicting the boundaries and existing uses and conditions of the TID are found in the respective mapping sections of this project plan.

**Summary of Findings**

As required by s.66.1105 Wis. Stats., and as documented in this Project Plan and the exhibits contained and referenced herein, the following findings are made:

1. That the area described herein on the boundary map (page 7) is a blighted area as defined in Section 66.1105(2)(ae), Wisconsin Statutes, that the property substantially impairs or arrests the sound growth of the Village and is in need of redevelopment and that "but-for" the creation of a tax incremental district, redevelopment (1) would not occur, or (2) would not occur in the manner at the value, or within the time frame desired by the Village. In making this determination, the Village has considered the following information:
  - Development within the TID has not occurred at the pace anticipated by the Village. Infrastructure and other development related expenses are not likely to be borne exclusively by private developers; therefore, the Village has concluded that public investment will be required to fully achieve the Village's objectives for these areas.
  - To achieve its objectives, the Village has determined that it must take an active role in encouraging development and redevelopment by making appropriate public expenditures in the area. Without the availability of tax increment financing, these expenditures are unlikely to be made. Enhancement of these areas will complement existing venues in the area, promote additional tourism, and benefit, not only the Village, but all overlapping taxing jurisdictions, adjacent communities, and the region. Accordingly, the costs to implement the needed projects and programs are appropriately funded through tax increment financing.
  - In order to make the area included within the TID suitable for development, the Village will need to make a substantial investment to pay for the costs of some or all of the projects listed in the project plan. Due to the public investment that is required, the Village has determined that development of the area will not occur at the pace or levels desired solely as a result of private investment.

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

2. The economic benefits of the Tax Incremental District, as measured by increased employment, business and personal income, and property values, are sufficient to compensate for the cost of the improvements. In making this determination, the Village has considered the following information:
  - As demonstrated in the Economic Feasibility Section of this Project Plan, the tax increments projected to be collected and the debt issuance will be more than sufficient to pay for the proposed project costs. On this basis alone, the finding is supported.
3. The benefits of the proposal outweigh the anticipated tax increments to be paid by the owners of property in the overlying taxing jurisdictions.
  - Since the development expected to occur is unlikely to take place without the use of Tax Incremental Financing (see Finding #1) and since the TID will generate economic benefits that are more than sufficient to compensate for the cost of the improvements (see Finding #2), the Village reasonably concludes that the overall benefits of the TID outweigh the anticipated tax increments to be paid by the owners of property in the overlying taxing jurisdictions. It is further concluded that since the "but for" test is satisfied, there would, in fact, be no foregone tax increments to be paid in the event the TID is not created.
4. The improvements to be made within the TID are likely to significantly enhance the value of substantially all other real property in the TID.
5. The equalized value of taxable property of the TID plus the value of all existing tax incremental districts in the Village does not exceed 12% of the total equalized value of taxable property within the Village.
6. The Project Plan for the TID is feasible and is in conformity with the master plan of the Village [assuming the changes to the master plan described in the Project Plan.].
7. The Village estimates that less than 35% of the territory within the District will be devoted to retail business at the end of the District's maximum expenditure period, pursuant to Wisconsin Statutes Sections 66.1105(5)(b).
8. The TID is being created by the Village as a blight district. As described in Finding #1 above, 50% or more of the proposed district's area is a blighted area.

Village of Pewaukee  
TID #3 Project Plan & District Boundary

Map of Proposed District Boundary

Current Map is reflective of the 01/01/2021 parcel list.



Village of Pewaukee  
TID #3 Project Plan & District Boundary

Map Showing Existing Uses and Conditions

Current Maps are reflective of the 01/01/2021 parcel list.



**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**Preliminary Parcel List and Analysis** - Current list is reflective of the 01/01/2021 parcel list. All parcels are bighted properties.

Tax Key	Street Address	Total Acres/Valuation	Use
PWV 0893987	449 W. Wisconsin Avenue	5.4662/\$0.00	Vacant school/greenspace/driveway
PWV 0893988	449 W. Wisconsin Avenue	1.4335/\$0.00	vacant property
PWV 0893989	449 W. Wisconsin Avenue	5.0698/\$0.00	Vacant school/greenspace/driveway
PWV 0893013	449 W. Wisconsin Avenue	1.2447/\$0.00	Parking lot/greenspace
PWV 0893923	449 W. Wisconsin Avenue	2.9732/\$0.00	Church/parking lot/cemetery (cemetery to be removed from TID)
PWV 0893056	449 W. Wisconsin Avenue	0.3427/\$0.00	residential
PWV 0893057	449 W. Wisconsin Avenue	0.3498/\$0.00	residential
<b>Total Acres/Valuation</b>		<b>16.8799/\$0.00</b>	

**Equalized Valuation Test**

The following calculations demonstrate that the Village is in compliance with s.66.1105(4)(gm)4.c. Wis. Stats., which requires that the equalized value of the taxable property in the proposed TID, plus the value increment of any existing Tax Incremental Districts, does not exceed 12% of the total equalized value of taxable property within the Village.

**Valuation Test Compliance Calculation**

2020 Equalized Valuation (TID IN)	\$1,120,935,100
Limit for 12% Test	\$ 134,512,212
Increment Value of Existing TIDs	\$ 9,583,400
Projected Base Value of New TID	\$ 0
Total Value Subject to Test	\$ 9,583,400
Compliance (\$9,583,400 < \$134,512,212)	Meets Requirement

**Statement of Kind, Number and Location of Proposed Projects**

The Village expects to implement the following public project improvements in conjunction with this TID. Any costs including eligible administrative costs necessary or convenient to the creation of the TID or directly or indirectly related to the public works and other projects are considered "project costs" and eligible to be paid with tax increment revenues of the TID.

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**IMPROVEMENT #1**  
LOCATION: 449 W. Wisconsin Avenue properties  
TOTAL: \$1,500,000

DESCRIPTION: Purchase of properties

**IMPROVEMENT #2**  
LOCATION: 449 W. Wisconsin Avenue properties  
TOTAL: \$200,000

DESCRIPTION: Raze former school building, remove parking lot and environmental remediation, if needed, to prepare site for redevelopment.

**IMPROVEMENT #3**  
LOCATION: East of Cheshire Lane/High Street intersection for approximately 1,152 feet  
TOTAL: \$500,000

DESCRIPTION: Increase Sanitary Sewer pipe from existing 8" size to 12". Current pipe size is deficient for future development as it is not sized consistent with pipe to the east and west of decreased pipe segment.

**IMPROVEMENT #4**  
LOCATION: Evergreen Lane  
TOTAL: \$285,000

DESCRIPTION: Relay existing water main approximately 775 feet in length to enhance ability to handle additional water flow related to future redevelopment of former school property.

**IMPROVEMENT #5**  
LOCATION: 449 W. Wisconsin Avenue properties  
TOTAL: \$100,000

DESCRIPTION: Raze former rectory and environmental remediation, if needed, to prepare site for redevelopment.

**FINANCING & INTEREST COSTS, ADMINISTRATIVE/ORGANIZATIONAL FEES, COST OF ISSUANCE**  
LOCATION: Entire TID  
TOTAL: \$750,000

DESCRIPTION: Debt financing and interest costs, Village staff administration fees, and cost of issuance.

Map Showing Proposed Improvements and Uses with 1/2 mile radius shown



**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**Detailed List of Project Costs**

Purchase of St. Mary's Property	\$1,500,000.00
Offsite sanitary sewer line upsizing from 8" to 12"	\$500,000.00
Evergreen Lane Watermain Relay	\$285,000.00
Razing of School/Gym – Environmental Remediation	\$200,000.00
Razing of Rectory – Environmental Remediation	\$100,000.00
Financing & Interest Costs, Administrative/Organizational Fees, Cost of Issuance	\$750,000.00
<b>Total</b>	<b>\$3,335,000.00</b>

All costs are based on current prices and are preliminary estimates. The Village reserves the right to increase these costs to reflect inflationary increases and other uncontrollable circumstances between creation of the TID and the time of construction. The Village also reserves the right to increase certain project costs to the extent others are reduced or not implemented, without amending the Project Plan. Total project costs are estimated and shall not exceed \$3,335,000. The tax increment allocation is preliminary and is subject to adjustment based upon the implementation of the Project Plan.

This Project Plan is not meant to be a budget nor an appropriation of funds for specific projects, but a framework within which to manage projects. All costs included in the Project Plan are estimates based on best information available. The Village retains the right to delete projects or change the scope and/or timing of projects implemented as they are individually authorized by the Village Board, without amending the Project Plan.

The Project Plan authorizes the expenditure of funds for project costs within a 1/2 mile radius of the TID boundary.



### **Economic Feasibility**

The information and exhibits contained within this Project Plan demonstrate that the proposed TID is economically feasible insofar as:

- The Village has available to it the means to secure the necessary financing required to accomplish the projects contained within this Project Plan. A listing of "Method of Financing and Timing of When Costs are to be Incurred" follows.
- The development anticipated to occur as a result of the implementation of this Project Plan will generate sufficient tax increments to pay for the cost of the projects. This Project Plan identifies the following: 1) the development expected to occur, 2) a projection of tax increments to be collected resulting from that development and other economic growth within the TID, and 3) a cash flow model demonstrating that the projected tax increment collections and all other revenues available such as debt issuance to the TID will be sufficient to pay all Project Costs.

In order to evaluate the economic feasibility of TID#3 it is necessary to project the amount of tax revenue that can be reasonably generated over the legal life of the TID. Included in Exhibit A is a proforma analysis of TID#3. The proforma analyzes expenses including debt service based on project plan costs of TID#3 against projected TID revenue. Tax revenue is conservatively estimated. Cash received from future TID#3 tax increments will be used to fund project costs and implementation of this Project Plan will also require that the Village issue debt obligations to provide direct or indirect financing for the Projects to be undertaken. In 2049, the final year of revenue collection for the TID, it is projected to have repaid all expenditures and is left with a positive surplus balance.

### **Method of Financing and Timing of When Costs are to be Incurred**

Implementation of this Project Plan will require that the Village issue obligations to provide direct or indirect financing for the Projects to be undertaken. The following is a list of the types of obligations the Village may choose to utilize.

#### General Obligation (G.O.) Bonds or Notes

The Village may issue G.O. Bonds or Notes to finance the cost of Projects included within this Project Plan. Wisconsin Statutes limit the principal amount of G.O. and State Trust Fund Loan debt that a community may have outstanding at any point in time to an amount not greater than five-percent of its total equalized value (including increment values).

#### Board of Commissioners of Public Lands State Trust Fund Loans

The Village may issue State Trust Fund Loans to finance the cost of Projects included within this Project Plan. Wisconsin Statutes limit the principal amount of State Trust Fund Loan and GO debt that a community may have outstanding at any point in time to an amount not greater than five-percent of its total equalized value (including increment values).

#### Bonds Issued to Developers ("Pay as You Go" Financing)

The Village may issue a bond to one or more developers who provide financing for projects included in this Project Plan. Repayment of the amounts due to the developer under the bonds are limited to an agreed percentage of the available annual tax increments collected that result from the improvements made by the developer. To the extent the tax increments collected are insufficient to make annual payments, or to repay the entire obligation over the life of the District, the Village's obligation is limited to not more than the agreed percentage of the actual increments collected. Bonds issued to developers in this fashion are not general obligations of the Village and therefore do not count against the Village's borrowing capacity.

The actual amount of debt issuance will be determined by the Village at its convenience and as dictated by the nature of the projects as they are implemented. It is estimated that debt issuance costs to finance project costs will incur in the year 2021.

#### Plan Implementation

Projects identified will provide the necessary anticipated governmental services to the area, and appropriate inducements to encourage redevelopment of the area. The Village anticipates making total project expenditures of approximately \$3,335,000 to undertake the projects listed in this Project Plan. The Expenditure Period of this District is 22 years from the date of adoption of the Creation Resolution by the Village Board. The projects to be undertaken pursuant to this Project Plan are expected to be financed primarily with cash received in the form of tax increment collections and the issuance of debt. As detailed in Exhibit A, the Village may choose to debt finance projects during the TID expenditure period. Cash flow proforma's assume debt issued in the year 2021, to finance certain public projects.

Developer agreements between the Village and property owners will be in place prior to making any public expenditure in direct support of development projects. These agreements can provide for development guarantees or a payment in lieu of development. To further assure contract enforcement, these agreements might include levying of special assessments against benefited properties. The order in which public improvements are made should be adjusted in accordance with development and execution of developer

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

agreements. The Village reserves the right to alter the implementation of this Plan to accomplish this objective. Interest rates projected are based on current market conditions. Municipal interest rates are subject to constantly changing market conditions. In addition, other factors such as the loss of tax-exempt status of municipal bonds or broadening the purpose of future tax-exempt bonds would affect market conditions. Actual interest expense will be determined once the methods of financing have been approved and securities or other obligations are issued.

**If financing as outlined in this Plan proves unworkable, the Village reserves the right to use alternate financing solutions for the projects as they are implemented.**

**Annexed Property**

There are no lands proposed for inclusion within the TID that were annexed by the Village on or after January 1, 2004.

**Proposed Changes in Zoning Ordinances**

The Village anticipates that the TID will require changes in zoning ordinances to implement this project plan. To the extent current zoning of individual parcels is inconsistent with the future uses of land listed in this plan, the Village may consider rezoning of those parcels. The District lands are primarily institutional in current zoning, though some parcels are existing residential. The creation of the District does not constitute "newly platted residential development.

**Proposed Changes in Master Plan, Map, Building Codes and Village Ordinances**

The Village anticipates that the TID will require changes in the master plan, map, and Village ordinances to implement this project plan. The Master Plan designation for a portion of the TID area will need to be changed to Single-Family Residential, 4 units per acre and a portion of the property will need to be rezoned to R-5 Single-Family with Infill Redevelopment Overlay.

**Relocation**

The Village does not anticipate the need to relocate persons or businesses in conjunction with this Plan. In the event relocation or the acquisition of property by eminent domain becomes necessary at some time during the implementation period, the Village will follow applicable state statutes as required in Wisconsin Statutes chapter 32.

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**Orderly Development of the Village**

Creation of the TID will enable the Village to undertake projects in furtherance of the stated objectives of its Comprehensive Plan and other planning documents. To this extent, creation of the TID promotes the orderly development of the Village.

**A List of Estimated Non-Project Costs**

Non-Project costs are public works projects that only partly benefit the TID or are not eligible to be paid with tax increment, or costs not eligible to be paid with Tax Incremental Financing funds. Examples would include:

- A public improvement made within the TID that also benefits property outside the TID. That portion of the total project costs allocable to properties outside of the TID would be a non-project cost.
- A public improvement made outside the TID that only partially benefits property within the TID. That portion of the total project costs allocable to properties outside of the TID would be a non-project cost.
- Projects undertaken within the TID as part of the implementation of this Project Plan, the costs of which are paid fully or in part by impact fees, grants, special assessments, or revenues other than tax increments.

The Village does not anticipate any non-project costs for the TID.

**Village Attorney Opinion**

Exhibit B contains a signed opinion from the Village attorney advising whether the project plan amendment is complete and complies with Section 66.1105(4)(f) of the Wisconsin Statutes.



**EXHIBIT C**  
**TID #3 BOUNDARY LEGAL DESCRIPTION**

Lot 10 and part of Lot 4 in Block B of Quinlan's Addition and Lands, all being a part of the Northwest 1/4 and Northeast 1/4 of the Northeast 1/4 of Section 8, Township 7 North, Range 19 East, in the Village of Pewaukee, Waukesha County, Wisconsin, bounded and described as follows:

Commencing at the Northwest corner of said Northeast 1/4 Section; thence North 89° 13' 42" East along the North line of said 1/4 Section a distance of 1022.94 feet to a point; thence South 03° 44' 26" East 216.25 feet to a point in the East line of Quinlan Drive and the South line of Foxtail Meadow III Subdivision, said point also the point of beginning of lands to be described; thence North 86° 00' 35" East along the South line of Foxtail Meadow II and Foxtail Meadow III a distance of 872.12 feet to a point; thence South 18° 13' 54" East 152.88 feet to a point; thence North 85° 21' 02" East 193.33 feet to the West line of High Street; thence South 29° 38' 59" East along said West line 67.01 feet to a point; thence South 86° 09' 36" West 175.72 feet to a point; thence South 29° 02' 08" East 215.94 feet to a point; thence South 88° 09' 19" West 77.04 feet to a point; thence South 18° 24' 25" East 144.54 feet to a point; thence South 86° 29' 04" West 254.80 feet to a point; thence South 01° 02' 09" East 204.64 feet to a point in the North line of Evergreen Lane; thence North 88° 47' 33" West along said North line 144.83 feet to a point; thence North 02° 36' 13" West 203.68 feet to a point; thence South 85° 10' 00" West 336.88 feet to a point; thence South 01° 24' 35" East 228.40 feet to a point; thence South 88° 27' 16" East 193.95 feet to a point; thence North 54° 44' 31" East 28.92 feet to a point; thence North 89° 07' 27" East 111.87 feet to a point on the West line of Evergreen Lane; thence South 00° 55' 47" East along said West line 301.73 feet to a point in the North line of West Wisconsin Avenue; thence North 76° 44' 41" West along said North line 330.92 feet to the Southeast corner of Lot 9, Block B in Quinlan's Addition; thence North 01° 11' 08" West along the East line of said Lot 9 for a distance of 128.24 feet to the Northeast corner of said Lot 9; thence North 76° 40' 18" West along the North line of Lots 9, 8, and 7, Block B in Quinlan's Addition for a distance of 174.52 feet to the Southeast corner of Lot 4, Block B, in Quinlan's Addition; thence North 01° 04' 51" West along the East line of said Lot 4 for a distance of 34.26 feet to a point; thence South 86° 14' 30" West along the North line of said Lot 4 for a distance of 112.94 feet to a point in the East line of Quinlan Drive; thence North 01° 04' 38" West along said East line 55.50 feet to the Southwest corner of Lot 3, Block B, in Quinlan's Addition; thence North 86° 14' 30" East along the South line of said Lot 3 for a distance of 112.94 feet to the Southeast corner of said Lot; thence North 01° 04' 51" West along the East line of Lots 3, 2, and 1, Block B in Quinlan's Addition for a distance of 168.11 feet to a point; thence South 86° 14' 30" West along the North line of said Lot 1 for a distance of 107.38 feet to a point on the East line of Quinlan Drive; thence North 03° 44' 26" West along said East line 532.23 feet to the point of beginning.

Said lands contains 685,651 square feet or 15.7404 acres.

**DISCLAIMER TEXT**

As required for all underwriters by the Municipal Securities Rulemaking Board ("MSRB"), Robert W. Baird & Co. Incorporated ("Baird") is hereby providing you with certain disclosures.

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If you have any questions or concerns about the above disclosures, please contact Baird Public Finance.

## PLANNING COMMISSION RESOLUTION #2021-01

Resolution Formally Adopting Proposed Project Plan and Boundaries for Tax Incremental District No. 3

### **RECOMMENDED ADOPTION OF THE PROJECT PLAN AND BOUNDARIES FOR TAX INCREMENTAL DISTRICT NO. 3 VILLAGE OF PEWAUKEE, WISCONSIN**

**WHEREAS**, pursuant to Wisconsin Statutes §66.1105 the Village of Pewaukee has determined that use of Tax Incremental Financing is required to promote development and redevelopment within the Village; and

**WHEREAS**, Tax Incremental District No. 3 (“the District”) is proposed to be created as a “blighted area district” based on findings that that a least 50 percent (by area) of the real property within the District is a blighted area; and

**WHEREAS**, a Project Plan for Tax Incremental District No. 3 has had been prepared that includes the following:

1. A statement listing the kind, number, and location of proposed public works or improvements within the District;
2. An economic feasibility study;
3. A detailed list of estimated project costs;
4. A description of the methods of financing all estimated project costs and the time when the related costs or monetary obligations are to be incurred;
5. A map showing existing uses and conditions of real property in the District;
6. A map showing proposed improvements and uses in the District;
7. Proposed changes of zoning ordinance, master plan, map, building codes, and Village Ordinances;
8. A statement of the proposed method for relocation of any person to be displaced;
9. A statement indicating how creation of the District promotes the orderly development of the Village;
10. A list of estimate non-project costs;
11. An Opinion of the Village Attorney advising that the plan is complete and complies with Wis. Statute §66.1105(4)(f); and

**WHEREAS**, prior to its publication, a copy of the notice of the public hearing by the Plan Commission was sent to Waukesha County, the Pewaukee School District, Waukesha County Technical College which constitutes all of the local governmental entities having the power to levy taxes on property located within the proposed District; and

**WHEREAS**, in accordance with the procedures specified in the Tax Increment Law, the Plan Commission, on February 11, 2021, held a public hearing concerning the project plan and boundaries and proposed creation of the District providing interested parties a reasonable opportunity to express their views on the proposed creation of a tax incremental district and the proposed boundaries of the District.

**PLANNING COMMISSION RESOLUTION #2021-01**

Resolution Formally Adopting Proposed Project Plan and Boundaries for Tax  
Incremental District No. 3

**NOW THEREFORE, BE IT RESOLVED** by the Plan Commission of the  
Village of Pewaukee that:

1. It recommends to the Village Board that Tax Incremental District No. 3, Village of Pewaukee, be created with boundaries as designated by Exhibit A, which is attached and incorporated herein by reference;
2. It recommends to the Village Board that based on the findings that at least 50 percent of the real property within the District is a blighted area, the District is declared to be a blighted area district;
3. It approves the Project Plan as prepared by Robert W. Baird & Co, dated January 22, 2021, which is incorporated herein in its entirety by reference, and recommends its approval to the Village Board;
4. Creation of the District promotes orderly development in the Village; and
5. That the Village Administrator is hereby directed to provide the Village Board with a certified copy of this Resolution upon its adoption by the Plan Commission.


Adopted this 11th day of February, 2021

**Village of Pewaukee**

By   
Jeff Knutson, Plan Commission Chairman

**CERTIFICATION**

I hereby certify that the foregoing Resolution was duly adopted by the Planning  
Commission of the Village of Pewaukee on the 11th day of February, 2021.

  
Cassie Smith,  
Village of Pewaukee  
Clerk

# Exhibit A

Village of Pewaukee  
TID #3 Project Plan & District Boundary

## Map of Proposed District Boundary

Current Map is reflective of the 01/01/2021 parcel list.



**Project Plan & District Boundary**  
**Tax Incremental District No. 3**  
**in the**  
**VILLAGE OF PEWAUKEE, WISCONSIN**



January 22, 2021 DRAFT

Organizational Joint Review Board Meeting Held..... February 9, 2021  
Public Hearing Held..... February 11, 2021  
Adopted by Planning Commission..... February 11, 2021  
Adopted by Village Board..... March 2, 2021  
Approved by Joint Review Board..... March 9, 2021

Prepared by:



Robert W. Baird & Co.  
Public Finance  
777 E. Wisconsin Ave.  
Milwaukee, WI 53202  
800.792.2473



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## **Village of Pewaukee Officials**

### **Village Board**

Jeff Knutson	Village President
Heather Gergen	Village Trustee
Ed Hill	Village Trustee
Tony Hopkins	Village Trustee
Craig Roberts	Village Trustee
Bob Rohde	Village Trustee
Kevin Yonke	Village Trustee

### **Village Staff**

Scott Gosse	Administrator
Cassie Smith	Clerk
Daniel Naze	Director of Public Works/Engineer
Mary Censky	Planner
Mark Blum	Attorney

### **Planning Commission**

Jeff Knutson (Chairperson)	Cheryl Mantz
Craig Roberts (Trustee)	Eric Rogers
Jim Grabowski	Joseph Zompa
Ryan Lange	

### **Joint Review Board**

Jeff Knutson	Village Representative
	Waukesha County
	Waukesha County Technical College
	Pewaukee School District
	Public Member

## **Introduction and Description of District**

The Village of Pewaukee (the "Village") is located in Waukesha County, approximately 20 miles west of Milwaukee and 60 miles east of Madison. The Village encompasses an area of approximately four square miles and is bordered by Pewaukee Lake, one of the area's largest lakes. State Highways 16 and 190 provide easy access to the Village. The Village provides police and fire protection, municipal water, sanitary sewer and storm sewer services and maintains two large parks and a public beach on Pewaukee Lake. These amenities allow the Village to flourish as a development area for residential, business, commercial retail, office, and industrial development.

The Village has a history of successful economic development programming using Tax Incremental Financing ("TIF") by providing public improvements to encourage and promote industrial, commercial and residential development and redevelopment. The goal is to increase the tax base, to provide for and preserve employment opportunities within the Village, and to create and enhance tourism opportunities with the area and region. The Village works with developers and property owners to provide infrastructure improvements and/or cash grants as incentives for development and/or redevelopment.

Tax Incremental District No. 3 (the "TID") is being created by the Village under the authority provided by Wisconsin Statute Section 66.1105. The TID is created as a "Blight District" based on the findings that at least 50 percent of the TID is a blighted area. A blighted area is property which is by reason of dilapidation, deterioration, age or obsolescence, inadequate provisions for ventilation, lights, air or sanitation, high density of population and overcrowding, or the existence of conditions, which endanger life or property by fire and other causes. The area is predominantly open and which because of obsolete platting, diversity of ownership, deterioration of structures or of site improvements or otherwise, substantially impairs or arrests the sound of growth of the community. The primary focus of this district is to promote the redevelopment of the former St. Mary's School site, former Rectory and surrounding parking lot and green space as single-family housing along with reselling the St. Mary's Church to an entity that would use and maintain the building which has been designated as a local historic landmark. The maximum life (absent extension) of the TID is 27 years from the date of adoption.

The Village anticipates various public improvement project cost expenditures of approximately \$3,240,000 during the TID's 22-year expenditure period. Proposed public project improvements may include, but not limited to infrastructure, professional and organizational services, administrative costs, and finance costs. As part of the Project Plan, Developer Incentives may be provided by the Village to developers of property within the TID in the form of Developer Funded Grants".

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

As a result of the creation of this TID, the Village projects a preliminary and conservative cash flow analysis indicating \$9,973,631 in increments. The TID increment will primarily be used to pay the debt service costs of the TID, and project development incentives. The Village projects land and improvement values (incremental value) of approximately \$23,690,000 will be created in the TID by the end of 2048. This additional value will be a result of the improvements made and projects undertaken with the TID.

Maps depicting the boundaries and existing uses and conditions of the TID are found in the respective mapping sections of this project plan.

**Summary of Findings**

As required by s.66.1105 Wis. Stats., and as documented in this Project Plan and the exhibits contained and referenced herein, the following findings are made:

1. That the area described herein on the boundary map (page 7) is a blighted area as defined in Section 66.1105(2)(ae), Wisconsin Statutes, that the property substantially impairs or arrests the sound growth of the Village and is in need of redevelopment and that "but-for" the creation of a tax incremental district, redevelopment (1) would not occur, or (2) would not occur in the manner at the value, or within the time frame desired by the Village. In making this determination, the Village has considered the following information:
  - Development within the TID has not occurred at the pace anticipated by the Village. Infrastructure and other development related expenses are not likely to be borne exclusively by private developers; therefore, the Village has concluded that public investment will be required to fully achieve the Village's objectives for these areas.
  - To achieve its objectives, the Village has determined that it must take an active role in encouraging development and redevelopment by making appropriate public expenditures in the area. Without the availability of tax increment financing, these expenditures are unlikely to be made. Enhancement of these areas will complement existing venues in the area, promote additional tourism, and benefit, not only the Village, but all overlapping taxing jurisdictions, adjacent communities, and the region. Accordingly, the costs to implement the needed projects and programs are appropriately funded through tax increment financing.
  - In order to make the area included within the TID suitable for development, the Village will need to make a substantial investment to pay for the costs of some or all of the projects listed in the project plan. Due to the public investment that is required, the Village has determined that development of the area will not occur at the pace or levels desired solely as a result of private investment.

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

2. The economic benefits of the Tax Incremental District, as measured by increased employment, business and personal income, and property values, are sufficient to compensate for the cost of the improvements. In making this determination, the Village has considered the following information:
  - As demonstrated in the Economic Feasibility Section of this Project Plan, the tax increments projected to be collected and the debt issuance will be more than sufficient to pay for the proposed project costs. On this basis alone, the finding is supported.
3. The benefits of the proposal outweigh the anticipated tax increments to be paid by the owners of property in the overlying taxing jurisdictions.
  - Since the development expected to occur is unlikely to take place without the use of Tax Incremental Financing (see Finding #1) and since the TID will generate economic benefits that are more than sufficient to compensate for the cost of the improvements (see Finding #2), the Village reasonably concludes that the overall benefits of the TID outweigh the anticipated tax increments to be paid by the owners of property in the overlying taxing jurisdictions. It is further concluded that since the "but for" test is satisfied, there would, in fact, be no foregone tax increments to be paid in the event the TID is not created.
4. The improvements to be made within the TID are likely to significantly enhance the value of substantially all other real property in the TID.
5. The equalized value of taxable property of the TID plus the value of all existing tax incremental districts in the Village does not exceed 12% of the total equalized value of taxable property within the Village.
6. The Project Plan for the TID is feasible and is in conformity with the master plan of the Village [assuming the changes to the master plan described in the Project Plan.].
7. The Village estimates that less than 35% of the territory within the District will be devoted to retail business at the end of the District's maximum expenditure period, pursuant to Wisconsin Statutes Sections 66.1105(5)(b).
8. The TID is being created by the Village as a blight district. As described in Finding #1 above, 50% or more of the proposed district's area is a blighted area.

Village of Pewaukee  
TID #3 Project Plan & District Boundary

Map of Proposed District Boundary

Current Map is reflective of the 01/01/2021 parcel list.



**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**Map Showing Existing Uses and Conditions**

Current Maps are reflective of the 01/01/2021 parcel list.



**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**Preliminary Parcel List and Analysis** - Current list is reflective of the 01/01/2021 parcel list. All parcels are bighted properties.

Tax Key	Street Address	Total Acres/Valuation	Use
PWV 0893987	449 W. Wisconsin Avenue	5.4662/\$0.00	Vacant school/greenspace/driveway
PWV 0893988	449 W. Wisconsin Avenue	1.4335/\$0.00	vacant property
PWV 0893989	449 W. Wisconsin Avenue	5.0698/\$0.00	Vacant school/greenspace/driveway
PWV 0893013	449 W. Wisconsin Avenue	1.2447/\$0.00	Parking lot/greenspace
PWV 0893923	449 W. Wisconsin Avenue	2.9732/\$0.00	Church/parking lot/cemetery (cemetery to be removed from TID)
PWV 0893056	449 W. Wisconsin Avenue	0.3427/\$0.00	residential
PWV 0893057	449 W. Wisconsin Avenue	0.3498/\$0.00	residential
<b>Total Acres/Valuation</b>		<b>16.8799/\$0.00</b>	

**Equalized Valuation Test**

The following calculations demonstrate that the Village is in compliance with s.66.1105(4)(gm)4.c. Wis. Stats., which requires that the equalized value of the taxable property in the proposed TID, plus the value increment of any existing Tax Incremental Districts, does not exceed 12% of the total equalized value of taxable property within the Village.

Valuation Test Compliance Calculation

2020 Equalized Valuation (TID IN)	\$1,120,935,100
Limit for 12% Test	\$ 134,512,212
Increment Value of Existing TIDs	\$ 9,583,400
Projected Base Value of New TID	\$ 0
Total Value Subject to Test	\$ 9,583,400
Compliance (\$9,583,400 < \$134,512,212)	Meets Requirement

**Statement of Kind, Number and Location of Proposed Projects**

The Village expects to implement the following public project improvements in conjunction with this TID. Any costs including eligible administrative costs necessary or convenient to the creation of the TID or directly or indirectly related to the public works and other projects are considered "project costs" and eligible to be paid with tax increment revenues of the TID.



**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**IMPROVEMENT #1**

LOCATION: 449 W. Wisconsin Avenue properties

TOTAL: \$1,500,000

DESCRIPTION: Purchase of properties

**IMPROVEMENT #2**

LOCATION: 449 W. Wisconsin Avenue properties

TOTAL: \$200,000

DESCRIPTION: Raze former school building, remove parking lot and environmental remediation, if needed, to prepare site for redevelopment.

**IMPROVEMENT #3**

LOCATION: East of Cheshire Lane/High Street intersection for approximately 1,152 feet

TOTAL: \$405,000

DESCRIPTION: Increase Sanitary Sewer pipe from existing 8" size to 12". Current pipe size is deficient for future development as it is not sized consistent with pipe to the east and west of decreased pipe segment.

**IMPROVEMENT #4**

LOCATION: Evergreen Lane

TOTAL: \$285,000

DESCRIPTION: Relay existing water main approximately 775 feet in length to enhance ability to handle additional water flow related to future redevelopment of former school property.

**IMPROVEMENT #5**

LOCATION: 449 W. Wisconsin Avenue properties

TOTAL: \$100,000

DESCRIPTION: Raze former rectory and environmental remediation, if needed, to prepare site for redevelopment.

**FINANCING & INTEREST COSTS, ADMINISTRATIVE/ORGANIZATIONAL FEES,  
COST OF ISSUANCE**

LOCATION: Entire TID

TOTAL: \$750,000

DESCRIPTION: Debt financing and interest costs, Village staff administration fees, and cost of issuance.

Village of Pewaukee  
TID #3 Project Plan & District Boundary

Map Showing Proposed Improvements and Uses with 1/2 mile radius shown



**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**Detailed List of Project Costs**

Purchase of St. Mary's Property	\$1,500,000.00
Offsite sanitary sewer line upsizing from 8" to 12"	\$405,000.00
Evergreen Lane Watermain Relay	\$285,000.00
Razing of School/Gym – Environmental Remediation	\$200,000.00
Razing of Rectory – Environmental Remediation	\$100,000.00
Financing & Interest Costs, Administrative/Organizational Fees, Cost of Issuance	\$750,000.00
<b>Total</b>	<b>\$3,240,000.00</b>

All costs are based on current prices and are preliminary estimates. The Village reserves the right to increase these costs to reflect inflationary increases and other uncontrollable circumstances between creation of the TID and the time of construction. The Village also reserves the right to increase certain project costs to the extent others are reduced or not implemented, without amending the Project Plan. Total project costs are estimated to be \$3,240,000. The tax increment allocation is preliminary and is subject to adjustment based upon the implementation of the Project Plan.

This Project Plan is not meant to be a budget nor an appropriation of funds for specific projects, but a framework within which to manage projects. All costs included in the Project Plan are estimates based on best information available. The Village retains the right to delete projects or change the scope and/or timing of projects implemented as they are individually authorized by the Village Board, without amending the Project Plan.

The Project Plan authorizes the expenditure of funds for project costs within a 1/2 mile radius of the TID boundary.

## **Economic Feasibility**

The information and exhibits contained within this Project Plan demonstrate that the proposed TID is economically feasible insofar as:

- The Village has available to it the means to secure the necessary financing required to accomplish the projects contained within this Project Plan. A listing of "Method of Financing and Timing of When Costs are to be Incurred" follows.
- The development anticipated to occur as a result of the implementation of this Project Plan will generate sufficient tax increments to pay for the cost of the projects. This Project Plan identifies the following: 1) the development expected to occur, 2) a projection of tax increments to be collected resulting from that development and other economic growth within the TID, and 3) a cash flow model demonstrating that the projected tax increment collections and all other revenues available such as debt issuance to the TID will be sufficient to pay all Project Costs.

In order to evaluate the economic feasibility of TID#3 it is necessary to project the amount of tax revenue that can be reasonably generated over the legal life of the TID. Included in Exhibit A is a proforma analysis of TID#3. The proforma analyzes expenses including debt service based on project plan costs of TID#3 against projected TID revenue. Tax revenue is conservatively estimated. Cash received from future TID#3 tax increments will be used to fund project costs and implementation of this Project Plan will also require that the Village issue debt obligations to provide direct or indirect financing for the Projects to be undertaken. In 2049, the final year of revenue collection for the TID, it is projected to have repaid all expenditures and is left with a positive surplus balance.

## **Method of Financing and Timing of When Costs are to be Incurred**

Implementation of this Project Plan will require that the Village issue obligations to provide direct or indirect financing for the Projects to be undertaken. The following is a list of the types of obligations the Village may choose to utilize.

### General Obligation (G.O.) Bonds or Notes

The Village may issue G.O. Bonds or Notes to finance the cost of Projects included within this Project Plan. Wisconsin Statutes limit the principal amount of G.O. and State Trust Fund Loan debt that a community may have outstanding at any point in time to an amount not greater than five-percent of its total equalized value (including increment values).

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

Board of Commissioners of Public Lands State Trust Fund Loans

The Village may issue State Trust Fund Loans to finance the cost of Projects included within this Project Plan. Wisconsin Statutes limit the principal amount of State Trust Fund Loan and GO debt that a community may have outstanding at any point in time to an amount not greater than five-percent of its total equalized value (including increment values).

Bonds Issued to Developers ("Pay as You Go" Financing)

The Village may issue a bond to one or more developers who provide financing for projects included in this Project Plan. Repayment of the amounts due to the developer under the bonds are limited to an agreed percentage of the available annual tax increments collected that result from the improvements made by the developer. To the extent the tax increments collected are insufficient to make annual payments, or to repay the entire obligation over the life of the District, the Village's obligation is limited to not more than the agreed percentage of the actual increments collected. Bonds issued to developers in this fashion are not general obligations of the Village and therefore do not count against the Village's borrowing capacity.

The actual amount of debt issuance will be determined by the Village at its convenience and as dictated by the nature of the projects as they are implemented. It is estimated that debt issuance costs to finance project costs will incur in the year 2021.

Plan Implementation

Projects identified will provide the necessary anticipated governmental services to the area, and appropriate inducements to encourage redevelopment of the area. The Village anticipates making total project expenditures of approximately \$3,240,000 to undertake the projects listed in this Project Plan. The Expenditure Period of this District is 22 years from the date of adoption of the Creation Resolution by the Village Board. The projects to be undertaken pursuant to this Project Plan are expected to be financed primarily with cash received in the form of tax increment collections and the issuance of debt. As detailed in Exhibit A, the Village may choose to debt finance projects during the TID expenditure period. Cash flow proforma's assume debt issued in the year 2021, to finance certain public projects.

Developer agreements between the Village and property owners will be in place prior to making any public expenditure in direct support of development projects. These agreements can provide for development guarantees or a payment in lieu of development. To further assure contract enforcement, these agreements might include levying of special assessments against benefited properties. The order in which public improvements are made should be adjusted in accordance with development and execution of developer

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

agreements. The Village reserves the right to alter the implementation of this Plan to accomplish this objective. Interest rates projected are based on current market conditions. Municipal interest rates are subject to constantly changing market conditions. In addition, other factors such as the loss of tax-exempt status of municipal bonds or broadening the purpose of future tax-exempt bonds would affect market conditions. Actual interest expense will be determined once the methods of financing have been approved and securities or other obligations are issued.

**If financing as outlined in this Plan proves unworkable, the Village reserves the right to use alternate financing solutions for the projects as they are implemented.**

**Annexed Property**

There are no lands proposed for inclusion within the TID that were annexed by the Village on or after January 1, 2004.

**Proposed Changes in Zoning Ordinances**

The Village anticipates that the TID will require changes in zoning ordinances to implement this project plan. To the extent current zoning of individual parcels is inconsistent with the future uses of land listed in this plan, the Village may consider rezoning of those parcels. The District lands are primarily institutional in current zoning, though some parcels are existing residential. The creation of the District does not constitute "newly platted residential development.

**Proposed Changes in Master Plan, Map, Building Codes and Village Ordinances**

The Village anticipates that the TID will require changes in the master plan, map, and Village ordinances to implement this project plan. The Master Plan designation for a portion of the TID area will need to be changed to Single-Family Residential, 4 units per acre and a portion of the property will need to be rezoned to R-5 Single-Family with Infill Redevelopment Overlay.

**Relocation**

The Village does not anticipate the need to relocate persons or businesses in conjunction with this Plan. In the event relocation or the acquisition of property by eminent domain becomes necessary at some time during the implementation period, the Village will follow applicable state statutes as required in Wisconsin Statutes chapter 32.

### **Orderly Development of the Village**

Creation of the TID will enable the Village to undertake projects in furtherance of the stated objectives of its Comprehensive Plan and other planning documents. To this extent, creation of the TID promotes the orderly development of the Village.

### **A List of Estimated Non-Project Costs**

Non-Project costs are public works projects that only partly benefit the TID or are not eligible to be paid with tax increment, or costs not eligible to be paid with Tax Incremental Financing funds. Examples would include:

- A public improvement made within the TID that also benefits property outside the TID. That portion of the total project costs allocable to properties outside of the TID would be a non-project cost.
- A public improvement made outside the TID that only partially benefits property within the TID. That portion of the total project costs allocable to properties outside of the TID would be a non-project cost.
- Projects undertaken within the TID as part of the implementation of this Project Plan, the costs of which are paid fully or in part by impact fees, grants, special assessments, or revenues other than tax increments.

The Village does not anticipate any non-project costs for the TID.

### **Village Attorney Opinion**

Exhibit B contains a signed opinion from the Village attorney advising whether the project plan amendment is complete and complies with Section 66.1105(4)(f) of the Wisconsin Statutes.

Village of Pewaukee  
TID #3 Project Plan & District Boundary

EXHIBIT A  
CASH FLOW PROFORMA ANALYSIS

Village of Pewaukee  
Tax Increment District No. 3  
Cash Flow Proforma Analysis

Assumptions	
Project Completion (Using Life of 100 Years)	0.00%
2022 Taxes (The 2020 Year's 2020 Estimated Values)	0.00%
Revenue Adjustment to 2021 Year	0.00%
Development Rate	0.00%
Development Rate (Using Life of 100 Years)	0.00%

New Issues - Preliminary		New Issues - Preliminary	
\$2,537,000 Taxable Rate Anticipation Note		\$2,548,000 Taxable G.O. Refunding Bonds	
Amount of Proceeds	\$2,537,000	Amount of Proceeds	\$2,548,000
Capitalized Interest	\$0	Capitalized Interest	\$0
Cost of Issuance (Net)	\$79,325	Cost of Issuance (Net)	\$77,465
Issuance	\$257	Issuance	\$1,570

Year	Backlog/Current Debt				Revenues			Expenditures					TID Status			
	(A)	(B)	(C)	(D)	(A)	(B)	(C)	(A)	(B)	(C)	(D)	(E)	(F)	(G)		
	TID General Obligation	Construction	TID Refunding	Fac. Debt	Tax	Development	Total	Interest	Principal	Debt	Additional TID Debt	Non-Interest	Capital	Amount Balance	Proj. Fund Commitment	Cost Recovery
2021	\$0	\$7,949,967	\$7,949,662	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2022	\$7,949,967	\$7,949,662	\$12,743,334	\$0	\$0	\$0	\$127,662	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2023	\$15,799,934	\$15,799,324	\$20,486,666	\$0	\$0	\$0	\$255,324	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2024	\$23,599,901	\$23,599,000	\$28,229,998	\$0	\$0	\$0	\$382,988	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2025	\$31,399,868	\$31,399,000	\$35,973,336	\$0	\$0	\$0	\$530,652	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2026	\$39,199,835	\$39,199,000	\$43,716,674	\$0	\$0	\$0	\$678,316	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2027	\$46,999,802	\$46,999,000	\$51,460,012	\$0	\$0	\$0	\$825,980	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2028	\$54,799,769	\$54,799,000	\$59,203,350	\$0	\$0	\$0	\$973,644	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2029	\$62,599,736	\$62,599,000	\$66,946,688	\$0	\$0	\$0	\$1,121,308	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2030	\$70,399,703	\$70,399,000	\$74,690,026	\$0	\$0	\$0	\$1,268,972	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2031	\$78,199,670	\$78,199,000	\$82,433,364	\$0	\$0	\$0	\$1,416,636	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2032	\$85,999,637	\$85,999,000	\$90,176,702	\$0	\$0	\$0	\$1,564,300	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2033	\$93,799,604	\$93,799,000	\$97,920,040	\$0	\$0	\$0	\$1,711,964	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2034	\$101,599,571	\$101,599,000	\$105,663,378	\$0	\$0	\$0	\$1,859,628	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2035	\$109,399,538	\$109,399,000	\$113,406,716	\$0	\$0	\$0	\$2,007,292	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2036	\$117,199,505	\$117,199,000	\$121,150,054	\$0	\$0	\$0	\$2,154,956	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2037	\$124,999,472	\$124,999,000	\$128,893,392	\$0	\$0	\$0	\$2,302,620	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2038	\$132,799,439	\$132,799,000	\$136,636,730	\$0	\$0	\$0	\$2,450,284	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2039	\$140,599,406	\$140,599,000	\$144,380,068	\$0	\$0	\$0	\$2,597,948	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2040	\$148,399,373	\$148,399,000	\$152,123,406	\$0	\$0	\$0	\$2,745,612	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2041	\$156,199,340	\$156,199,000	\$159,866,744	\$0	\$0	\$0	\$2,893,276	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2042	\$163,999,307	\$163,999,000	\$167,610,082	\$0	\$0	\$0	\$3,040,940	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2043	\$171,799,274	\$171,799,000	\$175,353,420	\$0	\$0	\$0	\$3,188,604	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2044	\$179,599,241	\$179,599,000	\$183,096,758	\$0	\$0	\$0	\$3,336,268	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2045	\$187,399,208	\$187,399,000	\$190,840,096	\$0	\$0	\$0	\$3,483,932	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2046	\$195,199,175	\$195,199,000	\$198,583,434	\$0	\$0	\$0	\$3,631,596	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2047	\$202,999,142	\$202,999,000	\$206,326,772	\$0	\$0	\$0	\$3,779,260	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2048	\$210,799,109	\$210,799,000	\$214,070,110	\$0	\$0	\$0	\$3,926,924	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2049	\$218,599,076	\$218,599,000	\$221,813,448	\$0	\$0	\$0	\$4,074,588	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2050	\$226,399,043	\$226,399,000	\$229,556,786	\$0	\$0	\$0	\$4,222,252	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Type of Item: Weight Estimation  
 2021: TID Inception  
 2041: Final Year in Issue TID-Related Query  
 2049: Maximum Length Life of TID (37 Years)  
 2048: Final Tax Collection Year

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Village of Pewaukee  
TID #3 Project Plan & District Boundary

**EXHIBIT B**  
**VILLAGE ATTORNEY OPINION**

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**EXHIBIT C  
TID #3 BOUNDARY LEGAL DESCRIPTION**

Lot 10 and part of Lot 4 in Block B of Quinlan's Addition and Lands, all being a part of the Northwest 1/4 and Northeast 1/4 of the Northeast 1/4 of Section 8, Township 7 North, Range 19 East, in the Village of Pewaukee, Waukesha County, Wisconsin, bounded and described as follows:

Commencing at the Northwest corner of said Northeast 1/4 Section; thence North 89° 13' 42" East along the North line of said 1/4 Section a distance of 1022.94 feet to a point; thence South 03° 44' 26" East 216.25 feet to a point in the East line of Quinlan Drive and the South line of Foxtail Meadow III Subdivision, said point also the point of beginning of lands to be described; thence North 86° 00' 35" East along the South line of Foxtail Meadow II and Foxtail Meadow III a distance of 872.12 feet to a point; thence South 18° 13' 54" East 152.88 feet to a point; thence North 85° 21' 02" East 193.33 feet to the West line of High Street; thence South 29° 38' 59" East along said West line 67.01 feet to a point; thence South 86° 09' 36" West 175.72 feet to a point; thence South 29° 02' 08" East 215.94 feet to a point; thence South 88° 09' 19" West 77.04 feet to a point; thence South 18° 24' 25" East 144.54 feet to a point; thence South 86° 29' 04" West 254.80 feet to a point; thence South 01° 02' 09" East 204.64 feet to a point in the North line of Evergreen Lane; thence North 88° 47' 33" West along said North line 144.83 feet to a point; thence North 02° 36' 13" West 203.68 feet to a point; thence South 85° 10' 00" West 336.88 feet to a point; thence South 01° 24' 35" East 228.40 feet to a point; thence South 88° 27' 16" East 193.95 feet to a point; thence North 54° 44' 31" East 28.92 feet to a point; thence North 89° 07' 27" East 111.87 feet to a point on the West line of Evergreen Lane; thence South 00° 55' 47" East along said West line 301.73 feet to a point in the North line of West Wisconsin Avenue; thence North 76° 44' 41" West along said North line 330.92 feet to the Southeast corner of Lot 9, Block B in Quinlan's Addition; thence North 01° 11' 08" West along the East line of said Lot 9 for a distance of 128.24 feet to the Northeast corner of said Lot 9; thence North 76° 40' 18" West along the North line of Lots 9, 8, and 7, Block B in Quinlan's Addition for a distance of 174.52 feet to the Southeast corner of Lot 4, Block B, in Quinlan's Addition; thence North 01° 04' 51" West along the East line of said Lot 4 for a distance of 34.26 feet to a point; thence South 86° 14' 30" West along the North line of said Lot 4 for a distance of 112.94 feet to a point in the East line of Quinlan Drive; thence North 01° 04' 38" West along said East line 55.50 feet to the Southwest corner of Lot 3, Block B, in Quinlan's Addition; thence North 86° 14' 30" East along the South line of said Lot 3 for a distance of 112.94 feet to the Southeast corner of said Lot; thence North 01° 04' 51" West along the East line of Lots 3, 2, and 1, Block B in Quinlan's Addition for a distance of 168.11 feet to a point; thence South 86° 14' 30" West along the North line of said Lot 1 for a distance of 107.38 feet to a point on the East line of Quinlan Drive; thence North 03° 44' 26" West along said East line 532.23 feet to the point of beginning.

Said lands contains 685,651 square feet or 15.7404 acres.

### **DISCLAIMER TEXT**

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## SUMMARY OF TID FACTUAL FINDINGS

As required by Sec. 66.1105, Wis. Stats. and as documented in the Exhibits contained and referenced herein, the following findings are made:

1. That the area described herein on the attached map (Exhibit 1) is a blighted area as defined in Section 66.1105(2)(ae), Wisconsin Statutes, that the property substantially impairs or arrest the sound growth of the Village and is in need of redevelopment and that “but-for” the creation of a tax incremental district, redevelopment (1) would not occur, or (2) would not occur in the manner at the value, or within the time frame desired by the Village. In making this determination, the Village has considered the following information:
  - In order to make the area proposed for redevelopment suitable for development and redevelopment, the Village will need to make a substantial investment to pay for the costs of site preparation, installation of utilities, installation of streets, and related streetscape items and other associated costs. Currently, existing sanitary sewer pipes are undersized to accommodate the size of development proposed for the area. Please see an attached letter from the Village’s Engineer, R. A. Smith, dated July 29, 2019 (attached as Exhibit 2), confirming existing sewer pipes in the proposed redevelopment area are undersized and would not accommodate the size of development anticipated. When considering full development conditions, three (3) out of the four (4) sewer pipes serving the redevelopment area east of High Street are undersized. To accommodate the size of development desired by the Village, the Village will have to invest significant resources in installing 12 inch sewer mains to accommodate the size and type of development desired.
  - The redevelopment area’s current storm water management system would not accommodate the density and type of development desired by the Village. Please see the attached letter from the Village engineer dated July 29, 2019 (Exhibit 2), which specifically outlines these concerns. In order to accommodate storm water runoff created by a development in the proposed redevelopment area. The Village Engineer recommends consideration be given to extending storm sewer onto the land proposed for redevelopment to pick up storm water in concentrated flows and allow it to travel into the storm sewer system. Alternatively, the Village will have to construct substantial infrastructure in order to contain and manage storm water runoff from any proposed development in the redevelopment area should connection to the storm sewer not be feasible.
  - The proposed redevelopment area has inadequate vehicular access to support a wholesale redevelopment of the area. Namely, existing access points to the redevelopment area located at Evergreen Lane and Quinlan Drive, are inadequate to support the type of density sought by the Village in a proposed development. As evidenced in the attached letter from the Director of Public Works (Exhibit 3), current access points along Quinlan Drive and Evergreen Lane would not support the anticipated increase in traffic flow to this area, nor is the existing access point at Evergreen Lane adequate to support the anticipated traffic flow increase. Both of these access points would have to be significantly widened and reconstructed in order to provide adequate access and traffic flow to and from this redevelopment area, at significant expense to the Village.

- The proposed redevelopment area contains an abandoned, unoccupied church structure which has been designated as a historical landmark. The area also includes an abandoned, unoccupied school building, accessory structures and a little used, but expansive, impervious surface parking facility. These structures, which are centrally located in an otherwise relatively open area proposed for redevelopment, arrest the possibility of any further development in this area unless they are eliminated or repurposed, both of which would only occur at great cost to the Village. Development would only occur with significant investment by the Village in reconfiguring the parking facilities, removing abandoned structures, and maintaining the historic, centrally-located church property.
  - That the condition of the church structure has deteriorated to the point of dilapidation. As noted in the attached property condition report (Exhibit 4), maintaining the historic structure in a safe condition would require extensive environmental and structural remediation. Though the Village wishes to retain this structure due to its significance in the history of the Village, and any redevelopment would need to at least retain this church structure, doing so would require extensive work to rehabilitate the structure so that it could be maintained and remediate the environmental concerns therein, including, but not limited to, the presence of asbestos.
  - That the proposed redevelopment area is an in-fill area contained within a mature, developed, single-family residential subdivision. The current configuration of the proposed redevelopment area is based on platting and subdivision decisions made obsolete by the abandonment of the church and school facilities. The outdated platting and land division of the area arrest future development in the proposed redevelopment area. Resources would have to be expended in site preparation, including a wholesale re-platting of the proposed development area to accommodate further residential development of the density desired by the Village.
  - The character and makeup of the redevelopment area, with irregularly shaped parcels, large open spaces, unused school and church structures, is such that previous proposed redevelopment plans have been rejected due to their incompatibility with the surrounding neighborhood. Proposed developments utilizing the current plat structure and accommodating existing structures have, thus far, been incompatible with the surrounding residential neighborhood.
  - The abandoned, unused school facilities and church structure contained in the proposed redevelopment area will, if not redeveloped and remediated, further deteriorate and negatively impact, health, safety and welfare of the citizens residing in the surrounding neighborhood, as well as the citizens of the Village at large.
2. In order to make the areas proposed for redevelopment suitable for development and redevelopment, the Village will need to make substantial investments to pay for the costs of property, right-of-way and easement acquisition, site preparation, installation and construction of utilities, installation of streets and related streetscape items, environmental mediation, grants and loans and other associated costs. Through the extensive initial investment in public infrastructure, rehabilitation, and acquisition of land having a historical nature, that is required in order to allow development and redevelopment to occur, the Village has determined that development and redevelopment of the area will not occur solely as a result of private investment. Accordingly, the

Village finds that, due to the reasons set forth above, that absent the use of a TIF development and redevelopment of the area is unlikely to occur.

**Village of Pewaukee  
TID #3 Project Plan & District Boundary**

**Map of Proposed District Boundary**

Current Map is reflective of the 01/01/2021 parcel list.

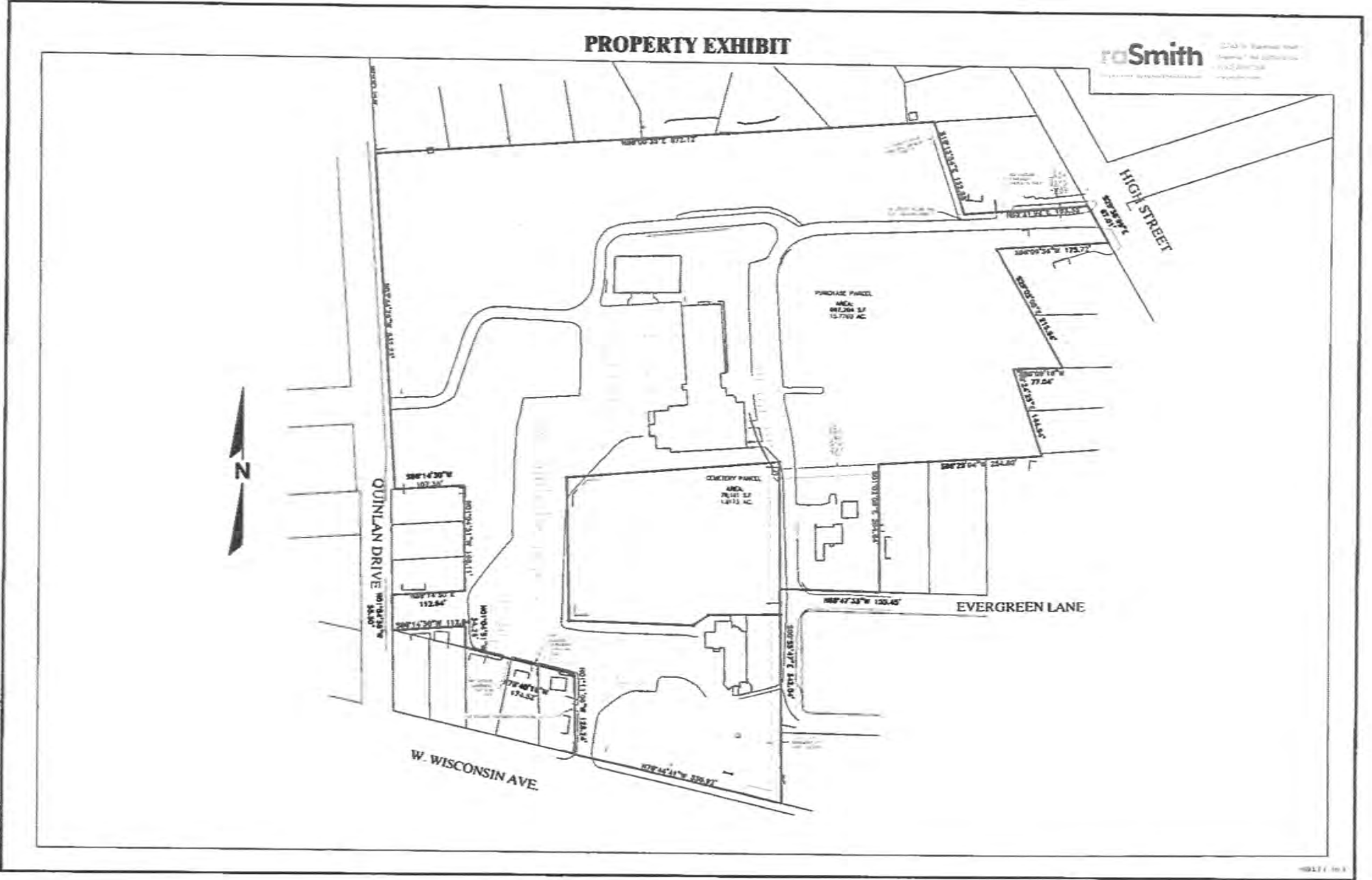


Exn 1

# PROPERTY EXHIBIT

raSmith

2243 N. Sherman Street  
Chicago, IL 60614  
312.287.7200  
www.ra-smith.com



Exh 1





CREATIVITY BEYOND ENGINEERING

R.A. Smith, Inc.  
16745 W. Bluemound Road  
Brookfield, WI 53005-5938  
(262) 781-1000 | rasmith.com

July 29, 2019

Mr. Scott Gosse  
Administrator  
Village of Pewaukee  
235 Hickory Street  
Pewaukee, WI 53072

Re: Queen of Apostles/Capri

Dear Mr. Gosse,

As directed by the Plan Commission, we have performed a peer review of the traffic, sanitary sewer and storm sewer systems for the proposed senior housing development proposed by Capri for the Queen of Apostles site. The traffic review has been prepared by Pat Hawley of our Traffic Division and is attached hereto. The sanitary and storm sewer reviews are below.

### Sanitary Sewer

The following information is needed to confirm my assumptions in to generate a conclusion on the effect of the sanitary flows on the Village current system.

1. Confirmation as to where the laterals from the church, rectory and school are currently connected to the sewer mains.
2. Confirmation on the number of anticipated residents for each type of housing use. For sake of my analysis I assumed the following:
  - Cassetta's 2.0 persons per unit
  - Apartments 1.5 persons per unit
  - Senior Housing 1.5 persons per unit
  - Memory Care 1.0 persons per unit
3. Maximum number of employee's for any one shift
4. Source of the per capita flow generation amounts

Base flows used to generate flows for analysis purposes:

Residential 100 gpd/capita\* at 2.5 capita per dwelling unit (non-senior housing)

Senior housing 100 gpd/capita\* at either 2.0 or 1.0 depending on the type of facility within senior housing developments.

Commercial 1,500 gallons/acre\*\*

The development plans indicate that the sanitary sewer system will be connected to an 8-inch sewer in Quinlan Drive south of Kettlewoods Court. Flow would be north to Cheshire Lane, to a 12-inch pipe that flows easterly to High Street. At High Street, the sewer continues easterly in an 8-inch pipe located in open lands north of Pewaukee Park Hills subdivision where it connects to a 12-inch relief sewer. Based on current peak flow, there is one section of the sewer system east of High Street that is undersized. The addition of the projected flows from the Capri development will worsen the undersized pipe and result in another section of pipe to be slightly undersized. Under full development conditions that are tributary to the 8-inch pipes east of High Street, three out of the four pipes are undersized.

\* from NR 110 13 (1) (c) \*\* from MMSD 2020 Facilities report pg 3C-17



Mr. Scott Gosse, Administrator  
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#### Conclusions:

- Existing flows from the church, rectory and school were not directed to the same sewer basin; therefore any flows from the proposed development will be new flows into the system being analyzed.
- Sanitary sewer pipes analyzed by the developer's engineer that are located downstream of the proposed connection point on Quinlan Drive have adequate capacity to accommodate the projected sewer flows from the development.
- Current sewer flows cannot be accommodated in one section of the 8-inch pipe that extends east of High Street.
- Additional flows from the development will not be able to be accommodated in the one 8-inch pipe as well as one additional pipe section. Ultimate flows from the development and vacant lands will result in not being able to meet capacity in three 8-inch pipes downstream from the proposed development.
- The development of the capacity of the 8-inch pipes were based on invert elevations from the Village's GIS system, which are assumed to be based off of as-built drawings. Confirmation of the inverts and slopes may be an appropriate option to determine if the recorded slopes match the actual slopes.
- Solution to address this issue is to increase the 8-inch pipe size to a 12-inch pipe size.

#### Storm Water Management

We performed a technical review of the storm water management information provided. Additional information needed to complete the review as indicated below.

1. Sheet flow lengths should be limited to 100 feet according to NRCS guidelines. Revise calculations.
  - a. For more information, see: <https://directives.sc.egov.usda.gov/OpenNonWebContent.aspx?content=27002.wba>
2. Provide calculations to show how stage-discharge relationship was developed for roof drains.
3. Specify where blue rooftop detention will be on plans. Need more details.
4. Outfall of 24" storm sewer located near outlet structure of pond. This will cause short circuiting and will not provide the necessary water quality benefits. Design is unacceptable and requires revision.
5. Provide inverts and sizes for all storm sewer and water main on plan set.
6. Outlet structure has 5" from top of outlet pipe to top of 24"x24" grate.
7. Milwaukee Winter Season range in WinSLAMM is incorrect - please refer to NR151.12(1)(b) for correct range.
8. Outlet structure was not modeled in WinSLAMM. Please revise model to include the structure.
9. Provide WinSLAMM model input and output to show how minimum amount of TSS removal needed for project. An exhibit to accompany these calculations would be beneficial or provide markup that was sent to Pete Wood.

There are some general considerations that need to be addressed prior to consideration by the Plan Commission. The proposed storm water management design results in a drainage swale sized for the 100-year storm along the north side of the proposed project. The storm water pond outlet is a 42-inch diameter pipe. Current conditions on the site allow for sheet flow runoff. The drainage swale and pipe will result in concentrated flows. The flows will likely cut a channel through the wooded area and overflow to Quinlan Drive. The conveyance system along Quinlan Drive is a 21-inch storm sewer that comes out of Kettlewoods Court and flows northerly towards Cheshire Lane. A storm sewer analysis should be provide that considers flows from the surrounding development as well as from the concentrated flows from the Capri development.



Mr. Scott Gosse, Administrator  
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The developer should explain and show that there are no adverse runoff impacts to existing properties. Consideration should be given to extending storm sewer onto the Queen of Apostles land to pick up the storm water in the concentrated flows and getting it into the storm sewer system, if it has been appropriately sized.

Minor items to address include extension of silt fence along West Wisconsin Avenue between driveways and that all references that the design complies with City and WDNR regulations should be changed to the Village and WDNR requirements.

Should you have any questions, please contact me.

A handwritten signature in blue ink that reads 'Timothy G. Barbeau'.

Timothy G. Barbeau, P.E., P.L.S.  
Village of Pewaukee Consulting Engineer

c: Dan Naze, Director of Public Works/Village Engineer



February 4, 2021

Village of Pewaukee  
Village Board

Re: Blight Finding Regarding TID

Dear Board Members:

I am writing this letter in my capacity as Director of Public Works for the Village of Pewaukee concerning issues of access to the former St. Mary's Church and School site in the Village. The property which is in question is generally described in the attached draft Certified Survey Map noted as Exhibit A. Use of the site is as a vacant property, inclusive of a former school building, gymnasium, rectory and church. There is also currently a cemetery which is approximately 1.8 acres in size. Access to the property is currently provided through a driveway from West Wisconsin Avenue to a parking area adjacent to the church and school; as well as another curvilinear access off of Quinlan Street to that same parking area; as well as another access off of High Street; and then an adjacent access off of Burroughs and Evergreen to the rectory and church cemetery.

In reviewing the overall size of the site in comparison to these access points, it is my opinion that the current access roadways are deficient in terms of their layout and size. Therefore, if development of this overall parcel is to occur, these access points will need to be widened and upgraded in order to properly serve traffic that might be generated through development of the site. In my opinion, the current access points, in their current form, are a limiting factor in the ability of this parcel to be developed.

Sincerely,

VILLAGE OF PEWAUKEE

Daniel Naze, P.E.  
Director of Public Works

DN/jb  
Enc.

Exh 3

Property Condition Assessment Report



**St Mary's Catholic Church**  
449 West Wisconsin Avenue  
Pewaukee, Wisconsin 53072

Prepared for:



20875 Crossroads Circle  
Suite 400  
Waukesha, WI 53186

Prepared by:



150 North Patrick Blvd  
Suite 180  
Brookfield, Wisconsin 53045

DALE R KENT  
SENIOR PROJECT MANAGER  
PCA ASSESSOR

DOUGLAS ERNST, PE  
SENIOR STRUCTURAL ENGINEER  
PCA ASSESSOR

SAMUEL FILISKO  
VP REGIONAL PRACTICE LEADER  
PCA REPORT REVIEWER

TRC Project Number 337553  
May, 2019

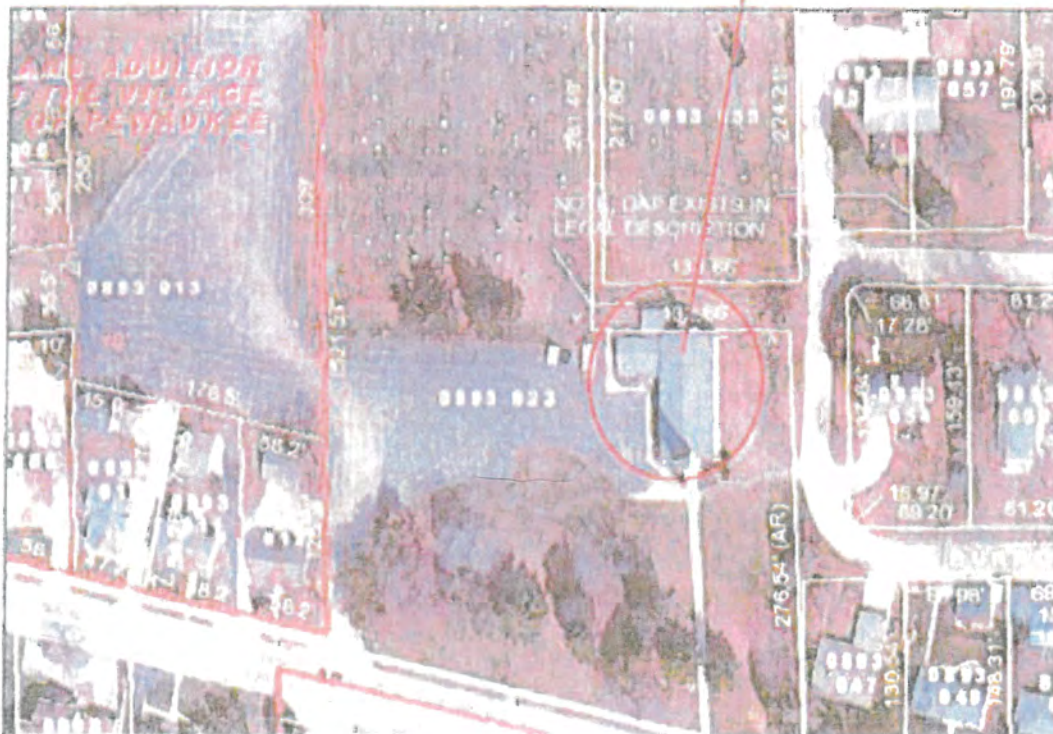
Exh 4

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Site Location

43°05'14.32"N  
88°16'07.63"W



## 1.0 EXECUTIVE SUMMARY

### 1.1 Subject Property Description

TRC Environmental Corporation (TRC) has performed a Property Condition Assessment (PCA) of the parcel and improvements listed in the following table defined as the subject property. The assessment was performed in general accordance with ASTM E2018-15 *Standard Guide for Property Condition Assessments: Baseline Property Condition Assessment Process* (ASTM E2018) or as specifically required by Capris Communities (Client).

The purpose of this PCA was to observe and document readily-visible materials and building system deficiencies that might significantly affect the value of the subject property and determine if conditions exist which may have a significant impact on the proposed option to upgrade the building, buildings systems and generally make improvements with the purpose of facilitating ongoing operation.

Subject Property Data	
Building Name	St Mary's Catholic Church
Address	449 West Wisconsin Avenue
City, County, State Zip Code	Pewaukee, Waukesha, Wisconsin 53072
Current Use or Type	Agape Community Church worship space
Site Area (acres)	1.92 per Google Earth (out of the 16 acres for the site)
Parcel Identification Number	PWV 0893 923 per Waukesha County Land Information System
Number of Buildings	One (1)
Building Area (gross square feet)	6,000 GSF 2,000 GSF (approximations using Google Earth)
Building Area (rentable square feet)	8,000 RSF
Number of Stories	1-story
Subgrade Spaces	Below original building and addition
Parking Provided	30 on-site spaces per TRC physical count
Zoning District	Not given. Surrounding is zoned residential.
FEMA Designated Flood Zone	The subject property is not located within a FEMA designated flood zone.
Year Built	1858
Additional Phases	1953
Significant Renovations	No recent activity was reported
Site Visit Date	April 9 <sup>th</sup> , 2019
Weather Conditions	40-degrees, windy with sunny skies
TRC Site Assessors	Dale Kent and Doug Ernst, PE
Site Escort	Wayne Wiertzema, Senior VP of Development with Capris Communities



## 1.2 General Physical Condition

Based on the systems and components observed during the site visit, the subject property appears to be in overall fair condition. The subject church building was being used by Agape Community Church for weekly services and by a local Boy Scout Troop.

## 1.3 Summary of Cost Data

TRC developed opinions of cost for recommended remediation of observed physical deficiencies within the subject property as further referenced in Section 6.0 of this report. The following table summarizes the opinions of costs identified during the site walk through.

FFBI	PROPERTY COMPONENT	QUANTITY	IMMEDIATE COST
	<b>Site Improvements</b>		
1.	Excavate and install exterior drain tile.	\$500/ft over 160 lineal feet	\$80,000.00
	<b>Building Enclosure</b>		
1.	Masonry:		
	1. Repair/replace below grade bricks/concrete.	\$31.25/sqft over 1,600 sqft of surface area	\$50,000.00
	2. Tuckpointing and chimney repair.	\$12/sqft over 5,000 sqft of surface area	\$65,000.00
2.	Windows: Replace lower level (basement) window systems.	15	\$15,000.00
3.	Roofing: Replace steeple roofing and Office roofs.	Steeple: \$80/sqft over 720 sqft surface area. Office: \$10/sqft over 760sqft surface area	\$57,600.00 \$7,600.00
	<b>Vertical Transportation</b>		
1.	Elevators: install new to meet ADA requirements.	1	\$170,000.00
	<b>ADA Code Compliance</b>		
1.	Interior: Alter anteroom floor – adjust for elevations.	At \$40/sqft over 2,125 square feet /surface area.	\$85,000.00
2.	Exterior: Install access ramps.	At \$1,250/lf over 80 lineal feet.	\$100,000
	<b>Environmental – Mold, Lead, Asbestos</b>		
1.	Lead Paint Abatement in the original church building.	At \$20/sqft over 11,250 square feet/surface area.	\$225,000.00
2.	Plaster replacement due to mold remediation.	At \$46.66/sqft over 11,250 sqft/surface area.	\$525,000.00
3.	Removal and remediation of mold contaminated drywall.	At \$21.34/sqft over 1,640 sqft/surface area.	\$35,000.00
	<b>Interior Elements</b>		
1.	Two new bathrooms to meet building code.	@ \$35,000 each	\$70,000.00
	<b>Total Immediate Costs</b>		<b>\$1,465,000.00</b>

## 2.0 PURPOSE AND SCOPE

TRC understands that the Client's purpose for having the PCA performed is to conduct a baseline survey of the general physical condition of select improvements located on the subject property.

Contract Summary	
Client Name	Capris Senior Communities
Authorizing Person's Name	Wayne Wiertzema
Authorizing Person's Title	Senior Vice President of Development
Authorization Date	04/08/19

TRC performed a PCA of the subject property that generally conforms to the scope and limitations of ASTM E2018 or as specifically required by the Client. The assessment included a walk-through survey, and interviews with person(s) knowledgeable with the site. TRC utilized experience and judgment to evaluate items observed and to assign condition assessment to them. The condition descriptions used in this report are described below:

- **Good:** Component or system is sound and performing its function. It may show signs of normal wear and tear commensurate with its age and some minor remedial work may be required.
- **Fair:** Component or system is performing adequately at this time; however, exhibits deferred maintenance, evidence of previous repairs, or workmanship is not in compliance with commonly accepted standards, or is approaching the end of its typical expected useful life. Repair or replacement is required to prevent further deterioration, restoration to good condition, and prevent premature failure.
- **Poor:** Component or system has either failed or cannot be relied upon to continue performing its original function as a result of having realized or exceeded its typical expected useful life, excessive deferred maintenance, a state of disrepair, or inherent design deficiency, or workmanship. Present condition could contribute or cause the deterioration of contiguous elements or systems. Repair or replacement is required.

TRC utilized information gathered about the property to estimate the EUL and RUL of items observed, and defined as follows:

- **Expected Useful Life (EUL):** an estimate of the average amount of time, in years, that an item, component or system may function when installed new, assuming routine maintenance is practiced.
- **Remaining Useful Life (RUL):** a subjective estimate of the number of remaining years that an item, component or system is able to function in accordance with its intended purpose before warranting replacement, based upon observation or average estimates of similar items, components, or systems or a combination thereof.

TRC utilized information and the estimated age to develop a list of recommended remedies or physical needs for the property. These needs are typically segregated into the following two categories:

- *Immediate Costs:* Items that require immediate action as a result of potential unsafe existing materials or conditions; building or fire code violations; and conditions that if left unremedied have the potential to result in or contribute to critical element of system failure within one year or will most probably result in a significant escalation of its remedial cost.
- *Over the Term Costs:* Items requiring repair and replacement which are beyond the scope of regular maintenance, but which are considered necessary to maintain the overall condition of the property.

For this report, the client has requested TRC limit our reporting to Immediate Costs

### **3.0 SYSTEM DESCRIPTION AND OBSERVATIONS**

#### **3.1 Overall General Description**

The subject property is located on the north side of West Wisconsin Avenue within the city limits of Pewaukee, Wisconsin. The subject property is improved with a single-story church and office/annex. The subject property was currently being used by the Agape Community Church at the time of the site visit.

There are two (2) main entries to the building. Neither point of entry provides ADA access.

Site improvements include surface parking for employees and parishioners. According to Waukesha County, the subject property is a single "L" shaped parcel that includes an adjacent cemetery to the northwest.

The north side of the site is bordered by the now closed Queen of Apostles Catholic School and an additional cemetery. The east and west sides of the site are bordered by residential development. The south side of the site is bordered by Wisconsin Avenue.

#### **3.2 Site Improvements**

##### **3.2.1 TOPOGRAPHY**

Not part of this report.

##### **3.2.2 STORM WATER DRAINAGE**

Not part of this report.

##### **3.2.3 VEHICULAR ACCESS, PAVING, CURBING, AND PARKING**

Not part of this report.

##### **3.2.4 FLATWORK, WALKWAYS, GRADE-LEVEL STEPS, AND RAMPS**

As they relate to ADA compliance; building entrance flatwork and pedestrian walkways consist of poured in place concrete construction. The flatwork and walkways at the site appear to be in overall fair condition. Based on Google Earth imagery, concrete walkways throughout the site total approximately 1,758 square feet. Concrete deficiencies were observed at both entrances and are associated with the respective concrete grade level steps. The conditions will be necessarily be resolved during the installation of new ADA compliant rampways.

Grade-level steps are provided from the adjacent west parking area to the west entry walkway of the office annex. The step construction consists of cast-in-place concrete with painted wrought iron handrail assemblies. The concrete steps and handrail assembly appear to be in overall good condition.

No pedestrian walkway ramps were observed at the time of the site visit.

#### **Recommendations:**

- Install new ADA compliant rampways. (Immediate cost)

### **3.2.5 LANDSCAPING AND SITE APPURTENANCES**

Not part of this report.

### **3.2.6 RECREATIONAL SITE AMENITIES**

No recreational site amenities were observed during the site visit.

### **3.2.7 SPECIAL UTILITY SYSTEMS**

No material special on-site utility systems such as water treatment systems, wastewater treatment systems, or special power generation systems were observed or reported at the time of the site visit.

### **3.2.8 STRUCTURAL FRAME AND BUILDING ENVELOPE**

No original construction drawings of the building were available for review at the time of the site visit.

### **3.2.9 FOUNDATION AND FLOOR SLABS**

Foundation systems for these building types and geographic area are typically supported with cast-in-place shallow perimeter concrete grade beams, and concrete footings at interior column locations. Floor construction appears to consist of concrete slab-on-grade.

Substructure construction could also not be verified while on-site due to hidden conditions. Observed visible floor finishes generally appear to be level with no unusual or significant displacement.

#### ***Recommendations:***

No necessary repairs were identified at the time of the site visit.

### **3.2.10 BUILDING FRAME**

The building structure appears to consist of a multi-wythe Lannon stone construction including perimeter and interior heavy timber wood columns, wood hammer beams in the arches, and timber joists supporting the wood plank roof deck. The perimeter building walls are assumed to include wood studs with stone veneer. In the attic space, scissor trusses are arranged in a diamond configuration with wooden plaster strapping affixed to horizontal joists. The building frame appears to be in overall good condition. There were no visible structural deficiencies observed that require repair.

#### ***Recommendations:***

No necessary repairs were identified at the time of the site visit.

### **3.2.11 EXTERIOR FACADES AND WINDOWS**

The exterior facades of the building are generally constructed with coarse rock-faced Lannon stone laid in the solar method at the main church entryway, with the main body of the church being bed-faced Lannon stone attached in the random Ashlar fashion. Similarly, the office annex addition features random Ashlar smooth cut Lannon stone fashioned in the random Ashlar pattern. At the north end of the church building there is a common brick chimney of no significant architectural importance. In the fenestration openings there are wood window sections with insulated glazing units, wood framed stained glass windows and wood framed hollow metal doors. The exterior walls of the building terminate below the roof line behind a curvilinear soffit moulding with the gutters mounted flush to the top of a freeze board. On the gable ends of the church building there is additional decorative wood soffit containing a similar curvilinear

profile. Exterior walls of the office annex terminate beneath a typical contemporary soffit and freeze board arrangement.

The wood-framed window and entry systems appear to be in overall good condition. However, the basement windows are in relatively poor condition due to moisture damage. There is exterior wood perimeter case moulding surrounding the main entrance that is in fair to poor condition. Observation showed severely deteriorated wood; splitting, and water damaged at the interface of wood moulding and concrete. The wood soffit elements are generally in good condition the exception being the gable ends where severe peeling of the paint was observed. In addition, the Cedar vented belfry openings showed were observed to be in poor condition with signs of wood weathering/deterioration due to severe peeling paint.

The exterior stone facades appear to be in overall fair condition. General tuckpointing is recommended throughout the field of the façade, with the chimney requiring more acute attention. Sealants throughout the building facades appear to be in overall good condition. Costs associated with repairing the belfry openings are included in the steeple roof repairs. An opinion of costs associated with replacing the basement windows are included in the table found in Section 1.3 Summary of Cost Data. Other costs fall below the given threshold of \$3,500.00 and are not itemized in this report.

#### *Recommendations:*

- Repoint deficient masonry joints using a lime rich-low Portland content mortar. TRC recommends using lime-rich pre-manufactured mortar mixes over hand mixing. In addition, TRC recommends the testing of existing historic mortars to determine a match with the dominant color and correct ratio of lime to Portland to sand. Test using ASTM C1324 Standard Test Method for Examination and Analysis of Hardened Masonry Mortar.
- Replace basement windows.
- Repair and paint the Cedar belfry openings.
- Repair and paint the wood perimeter case moulding around the main entrance.

#### **3.2.12 BALCONIES, EXTERIOR STAIRS, AND ELEVATED WALKWAYS**

No balconies, exterior stairs, or elevated walkways were observed during the site visit.

#### **3.2.13 ROOFING SYSTEMS AND DRAINAGE**

The main roof system on the building consists of a steep-sloped granule surfaced 3-tab asphalt shingle with copper gutters and downspouts. The main church building roof slopes to external gutters which are piped to out into the front lawn via down spouts on the west elevation and discharge out over the lawn on the east elevation. (The outlet onto the lawn was plugged by the current tenant which most likely caused the recent basement flooding.) On the office annex, the roof system consists of a similar more moderately sloped shingle system with gutters on the south side of the roof discharging into the municipal storm sewer system and the north side gutters discharging out onto the lawn. The EUL of this type of shingle system is typically 15 years depending upon the quality of installation and how well it is maintained. Observations showed wind damage to the south slope of the office annex roof due to substandard installation methods and severe weathering of the shingles found on the steeple. TRC recommends full tear-off and replacement of these roofs.

No warranty information was received prior to issuing this report. No active roof leaks were observed or reported at the time of the site visit. An opinion of costs associated with replacing these roofs are included in the table found in Section 1.3 Summary of Cost Data

There is a secondary roof system on the main church building entry vestibule that consists of a low-sloped fully adhered EPDM with tapered roofing insulation. This roof slopes to an internal drain system and through the small stone.

No warranty information was received prior to issuing this report. No active roof leaks were observed or reported at the time of the site visit. The EUL of an EPDM roof system is typically 20-years depending on how well it is maintained. The EPDM roof system appears to be in overall good condition. Based on the assumed age, current condition, and EUL, replacement is not anticipated during the term.

During TRC's time on site, it was observed that below grade masonry associated with the original church building is in poor condition. Water discharged from roofing downspouts has caused significant deterioration to below grade masonry and may be causing an unstable condition. TRC recommends excavating down to the footings, inspecting and repairing deteriorated masonry followed by the installation of below grade waterproofing and a new drain tile system to direct water away from the building. An opinion of costs associated with replacing these roofs are included in the table found in Section 1.3 Summary of Cost Data.

**Recommendations:**

- Replace the steeple and office annex roofs.
- Repair/replace below grade masonry and install new drain tile

**3.2.14 MECHANICAL AND ELECTRICAL SYSTEMS**

**3.2.15 PLUMBING, DOMESTIC HOT WATER, AND SEWER SYSTEMS**

Not part of this report.

**3.2.16 HEATING, VENTILATION, AND AIR CONDITIONING**

Heating, ventilation, and air conditioning (HVAC) throughout the building interior is provided via two Trane XE80 high efficiency gas furnace units installed circa 1996. These units are controlled with two thermostats located just outside the kitchen area. In addition, two Series 100 gas-fired heating boilers manufactured by Vaillant and installed in 1989 supply heat to the main church building. (It should be noted the Vaillant is a European manufacturer that pulled out of the U.S. market in 1995) All of these systems are located in the mechanical room. Insulated hot water piping is distributed throughout the building to each of the VAV control units. Conditioned air is supplied through sheet metal ducting and ceiling diffusers. There were no A/C units observed.

The EUL of gas-fired boilers generating hot water for building heat is typically 30-years depending on how well they are maintained. Based on the age, current condition, and EUL, replacement is not anticipated during the term. A current inspection sticker was observed mounted to the boiler.

The EUL of gas-fired furnaces generating hot air for building heat is typically 50-years depending on how well they are maintained. Based on the age, current condition, and EUL, replacement is not anticipated during the term.

**Recommendations:**

- Continue with maintenance and inspection.

### **3.2.17 ELECTRICAL**

Not included in this report

### **3.2.18 VERTICAL TRANSPORTATION**

No vertical transportation or elevators were observed during the site visit. In order to achieve the client's accessibility goals, TRC recommends installing new two-stop hydraulic elevator, an elevator pit to accommodate the hydraulic workings and an elevator room. An opinion of costs associated with the installation of a new hydraulic elevator system are included in the table found in Section 1.3 Summary of Cost Data.

### **3.2.19 LIFE SAFETY AND FIRE PROTECTION**

#### **3.2.20 FIRE SUPPRESSION SYSTEMS**

- Not included in this report

#### **3.2.21 ALARM SYSTEMS**

- Not included in this report

#### **3.2.22 INTERIOR ELEMENTS**

#### **3.2.23 COMMON AREAS**

The subject building is a single tenant occupancy therefore no common areas are included.

#### **3.2.24 INTERIOR SPACES**

Typical interior spaces include finishes consisting of acoustical ceiling systems, recessed light coves, vinyl tile, painted drywall partitions and painted plaster. Interiors observed, appear to be in overall fair condition with some notable exceptions due to the suspected presence of mold and lead in the plaster of the church building and mold in some of the drywall located in the basement under the main building. Further, TRC observed significant cracking in the plaster walls and ceiling of the church building. The suspected environmental conditions will

It is TRC's opinion that the cracks in the plaster are not related structural movement of the building as it sits today. They are most likely associated with the addition to the basement during the 1953 construction. Plaster of this kind is applied by craftsman to a lightweight wood lattice system. Once the plastering is complete, it in effect becomes monolithic and quite rigid. From the arches out into the field of the ceiling the entire plaster system is supported by the wood lattice system which is mechanically secured to hidden timbers using nails. Due to the weight of cured plaster, additional reinforcement is needed in the transition from vertical wall out into the arches to prevent collapse of the ceiling. This is usually accomplished in several ways using a combination of heavy gauge wire, galvanized rod and vertical wood slats secured to horizontal trusses within the scissor truss system in the attic space. When the building was jacked up to facilitate installation of the new basement and it's supporting foundation and walls; it is likely there was some minor sway in the ceiling and arches, some of the vertical reinforcement may have broken, stretched or become miss aligned and it is also very likely there was some settling of the new foundation after the church building was lowered. These were all possible contributing factors to the cracking observed in the plaster, particularly the plaster was not supported diagonally in the attic space



or at the transition from vertical to arches and ceiling. Due to the nature of the client's requirements for immediate cost, TRC does not recommend further investigation. Suspected mold and lead contamination are addressed in the following sections: 3.2.25 Limited Visual Lead Assessment and 3.2.26 Limited Mold Assessment.

### **3.2.25 LIMITED VISUAL LEAD ASSESSMENT**

As part of performing this PCA, visual observations for overt signs of suspect lead contamination were also performed. These observations were not performed to discover all affected areas, nor were areas of the subject property observed specifically for the purpose of identifying areas of suspected lead contamination. The subject property areas viewed were limited to those necessary to perform the primary scope of this PCA.

The assessment did not investigate other contaminants in or around any other structure, and our service was not designed or intended to prevent or lower the risk of the occurrence of the amplification of the same. The Client acknowledges that lead containing materials are ubiquitous to the nature of construction materials used at the time of the building's construction.

Visual indications of significant suspect lead contamination were not observed during the site visit. An opinion of costs associated with potential lead abatement are included in the table found in Section 1.3 Summary of Cost Data.

#### **Recommendations:**

Remove and abate suspected lead paint from plaster surfaces. An opinion of costs associated with lead abatement is included in the table found in Section 1.3 Summary of Cost Data.

### **3.2.26 LIMITED VISUAL MOLD ASSESSMENT**

As part of performing this PCA, visual observations for overt signs of suspect mold growth were also performed. These observations were not performed to discover all affected areas, nor were areas of the subject property observed specifically for the purpose of identifying areas of suspect mold growth. The subject property areas viewed were limited to those necessary to perform the primary scope of this PCA.

The assessment did not investigate other biological contaminants in or around any structure, and our service was not designed or intended to prevent or lower the risk of the occurrence of the amplification of the same. The Client acknowledges that mold is ubiquitous to the environment with mold amplification occurring when building materials are impacted by moisture. The Client further acknowledges that site conditions are outside of TRC's control, and that mold amplification will likely occur, or continue to occur, in the presence of moisture. As such, TRC cannot and shall not be held responsible for the occurrence or recurrence of mold amplification.

Visual indications of significant suspect microbial growth were not observed during the site visit. An opinion of costs associated with potential mold abatement are included in the table found in Section 1.3 Summary of Cost Data.

#### **Recommendations:**

Due to repeated flooding of the church basement area TRC suspects there to be mold contamination within the basement wall assemblies. TRC recommends removal and replacement of the drywall as part of the mold abatement process. In addition, TRC suspect mold contamination exists within the wall

cavity behind the plaster due to past roof and wall leaks. Accordingly, TRC recommends removal and replacement of the plaster as part of any mold abatement.

### 3.3 Limited Visual ADA Tier I Accessibility Assessment

As defined under Title III of the ADA, existing facilities considered to be "public accommodations" must take steps to remove architectural and communication barriers that are deemed "readily achievable" under the retroactive requirements. Compliance with the 2010 ADA Standards for Accessible Design is required for new construction and alterations on or after March 15, 2012.

This assessment included a limited review of the "common" interior and exterior path of travel areas of the property. Significant items of non-conformance, if any, are noted without regard as to whether or not they are "readily achievable." Factors to be considered in determining whether or not an action is readily achievable include the nature and cost of the action, the number of person employees at the subject property and the financial resources available of ownership. The decision as to which actions are to be undertaken as readily achievable is to be determined by building owner in consultation with its accountants, attorneys and design/construction professionals. Vehicle parking issues were not part of this report.

It was observed that exterior entrances lack proper ADA accessibility ramps.

Public restrooms observed appear to be generally noncompliant with ADA requirements.

It was observed that there are varying floor elevations in the transition from the main church building to the coffee lounge and to restrooms and parish kitchen. This condition is not ADA compliant. An opinion of costs associated with adjusting these floor elevations to meet ADA requirements, are included in the table found in Section 1.3 Summary of Cost Data.

#### *Recommendations:*

- Install two new ADA compliant restrooms. (Immediate Cost)
- Build up floor in the ante room/church to eliminate the change in elevation from church to coffee lounge area.

### 3.4 Additional Consideration

An option to the installation of new bathrooms, an elevator and reconfiguring the floor elevations is to move all services to the main floor level. This would necessarily involve putting an addition on the building at a cost of \$300,000 to \$400,000.00.

#### 4.0 DOCUMENT REVIEW AND INTERVIEWS

TRC requested the following information regarding the subject property from various sources. Copies received are included in the Appendices of this report.

Document	Resource	Comments
TRC PCA Pre-Survey Questionnaire	Client	Received
Record Construction Drawings	Current Owner	Not Provided
Maintenance Logs	Current Owner	Not Provided
Prior PCA Report	Current Owner	Not Provided
Certificate of Occupancy	N/A	N/A
Building, Fire, Life Safety, Zoning Violations	Local Municipal Fire, Building, and Zoning Departments	No outstanding zoning code violations were reported. No reply regarding outstanding building and fire code violations were received prior to issuing this report.
Appraisal or ALTA/ACSM Land Title Survey	Current Owner	Not Provided
Warranty Information	Current Owner	Not Provided
Planned Capital Expenditures	Current Owner	Not Provided
Repair and/or replacement cost information (prior 3-years)	Current Owner	Not Provided
Pending proposals or contracts for material repairs/replacements	Current Owner	Not Provided
ADA Accessibility Survey	Current Owner	Not Provided
Rent Roll	Current Owner	Agape Community Church

TRC interviewed or communicated with the following parties during the site visit and/or preparation of the report for the subject property:

Interview Summary			
Name	Title/function	Affiliation	Phone
Wayne Wiertzema	Senior Vice President Development	Capris Communities	262.289.2709

## 5.0 OPINIONS OF COSTS

TRC developed opinions of cost for recommended remediation of observed physical deficiencies. The opinions of cost presented within this report are based on construction costs developed by construction resources such as Marshall & Swift, RS Means, TRC's database of experience with past costs from similar projects, city cost indexes, consultations with local specialty contractors, client-provided information, user provided unit costs, and assumptions regarding future economic conditions.

Actual cost estimates are determined by many factors including but not limited to: choice and availability of materials, choice and availability of a qualified contractor, regional climate zone, quality of existing materials, site compatibility, and access to the subject property and building.

In addition, opinions of costs are based solely on replacement of "like-kind" materials and do not account for soft costs. Recommended remediation does not anticipate an upgrade or improvement of existing conditions, unless specifically indicated otherwise.

Some cost items are determined based upon the estimated useful life (EUL) of a system or component, the apparent effective age, and the remaining useful life (RUL). Factors that may affect the age and condition of a system include, but are not limited to, the frequency of use, exposure to environmental elements, quality of original construction and installation, and amount of maintenance provided. Based on these factors, a system may have an effective age that is greater or less than its actual chronological age.

This report does not identify minor, inexpensive repairs or maintenance items that are clearly part of the property owner's operating budget or taken care of during typical building maintenance. This report excludes costs for systems or components that are reported to be a tenant responsibility to maintain and/or replace. This report also excludes costs that are below \$3,500 or the reporting threshold established by the engagement agreement, unless determined to be an immediate cost.

## 6.0 QUALIFICATIONS

Services performed by TRC were not intended to be technically exhaustive. There is a possibility that even with proper application of methodologies, conditions may exist on the property that could not be identified within the scope of the assessment(s) or that were not reasonably identifiable from the available information.

The services and report are not an instrument of professional architectural or engineering service, and TRC did not develop architectural or engineering findings, conclusions or recommendations, nor did TRC verify designs or design capacities. TRC's observations, opinions, and recommendations have been developed under the time and budgetary constraints inherent in ASTM E2018 and the authorized scope of services. Opinions do not warrant or guarantee the performance of any building components or systems or adequacy of design.

In accordance with guidelines set forth by ASTM E2018 current to the issuance of this report and subject to the limitations stated, TRC's report is based on a limited, ground level (except where otherwise explicitly indicated) visual inspection of the property. TRC did not perform any exploratory probing or discovery, perform tests, operate any specific equipment, or take measurements or samples. The PCA is not a building code, safety, regulatory, or environmental compliance inspection.

No PCA can wholly eliminate uncertainty regarding repair and maintenance needs in connection with the property. The PCA was intended to reduce, but not eliminate uncertainty regarding such needs. The observations and recommendations presented in this report are time dependent, and conditions will change. This report speaks only as of its date. Resumes for the site assessor and report reviewer are available upon request.

As part of performing this PCA, visual observations for overt signs of suspect mold growth were also performed. These observations were not performed to discover all affected areas, nor were areas of the subject property observed specifically for the purpose of identifying areas of suspect mold growth. The subject property areas viewed were limited to those necessary to perform the primary scope of this PCA.

The assessment did not investigate other biological contaminants in or around any structure, and our service was not designed or intended to prevent or lower the risk of the occurrence of the amplification of the same. The Client acknowledges that mold is ubiquitous to the environment with mold amplification occurring when building materials are impacted by moisture. The Client further acknowledges that site conditions are outside of TRC's control, and that mold amplification will likely occur, or continue to occur, in the presence of moisture. As such, TRC cannot and shall not be held responsible for the occurrence or recurrence of mold amplification.

Visual indications of significant suspect microbial growth were not observed during the site visit.

## 7.0 LIMITING CONDITIONS

ASTM E2018 sets forth limitations in the assessment process. Limitations to the accuracy and completeness of this report are tabulated as follows:

- **Access Limitations** – No access limitations were encountered during our site visit.
- **Physical Obstructions to Observations** - Portions of the building may not have been fully observable due to stored material, furniture, equipment, height of building exterior, or interior finishes at the time of our site visit.
- **Outstanding Information Requests** - Information requested from the local municipality or others may not have been received in time for this report. If information received from these sources will alter the conclusions of this report, an addendum will be issued.

TRC performed the PCA using methods and procedures and practices generally conforming to the ASTM E2018 guide. The guide describes these methodologies as representing good commercial and customary practice for performing a PCA of a parcel of property. Findings and conclusions derived from the methodologies described in the guide contain all of the limitations inherent in the methodologies that are referred to in the guide.

TRC warrants that the findings contained in this report have been prepared in general accordance with accepted professional practices at the time of report preparation as applied by similar professionals. Future changes in standards, practices, or regulations cannot be anticipated and have not been addressed.

The methodologies include reviewing information provided by other sources. TRC treats information obtained from the record reviews and interviews concerning the property as reliable and the guide does not require TRC to independently verify the information. Therefore, TRC cannot and does not warrant or guarantee that the information provided by these other sources is accurate or complete. No other warranties are implied or expressed.

### **Reliance and Use By Others**

This report has been prepared to assist the Client in evaluating the condition of various building components at the property referred to in the report. This report may be relied upon by the Client, and any one or more of its affiliates, successors, and/or assigns.

This report speaks only as of its date.

8.0 PROPERTY PHOTOGRAPHS



1. East elevation of main church building



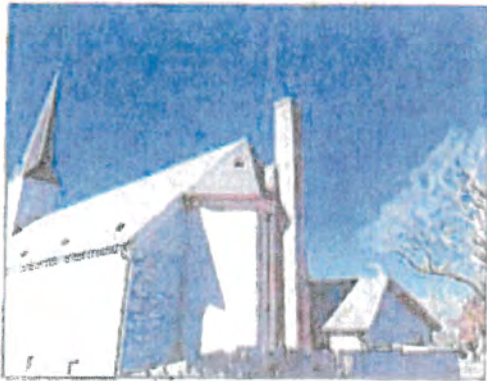
2. View from lawn near Wisconsin Avenue



3. West elevation.



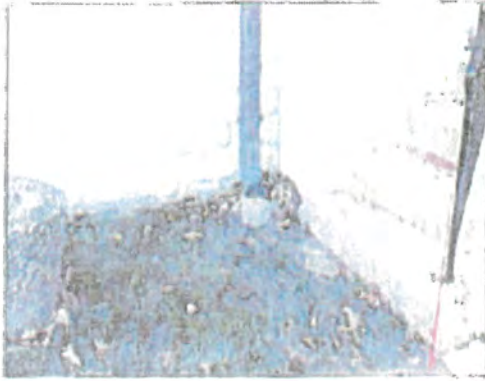
4. North elevation view from the west



5. North elevation view from the east



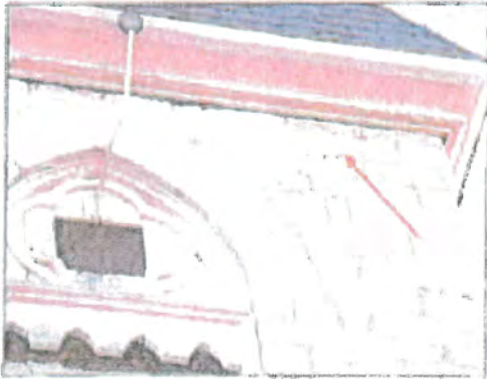
6. South elevation.



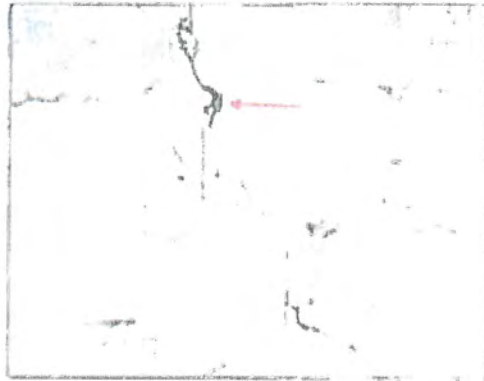
7. At annex stair entrance.



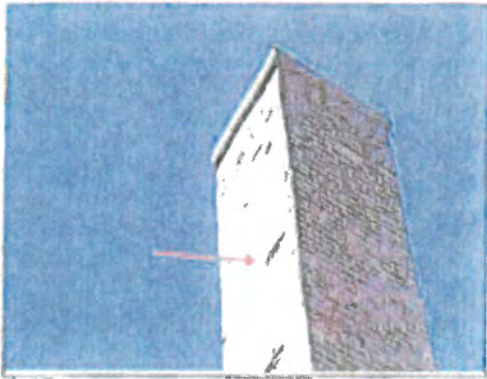
8. West elevation of church building.



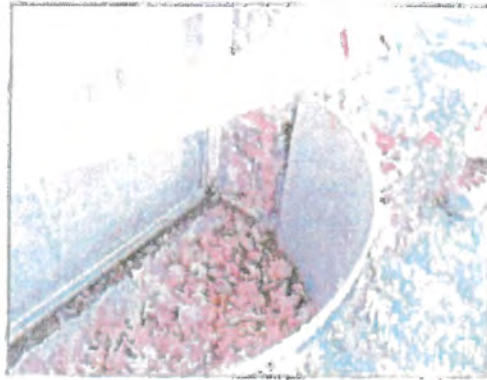
9. Steeple mortar deficiencies



10. Step cracking in mortar at west elevation.

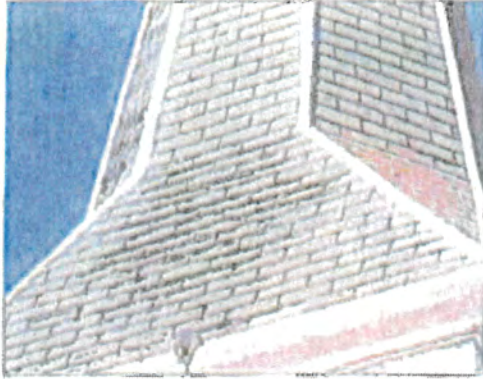


11. Masonry deficiencies on chimney



12. Rotted wood window West elevation of church.





13. Shingle deterioration on steeple, east elevation.



14. Annex entrance, south elevation. Note the trip hazard painted yellow



15. Change in floor elevation from church into annex



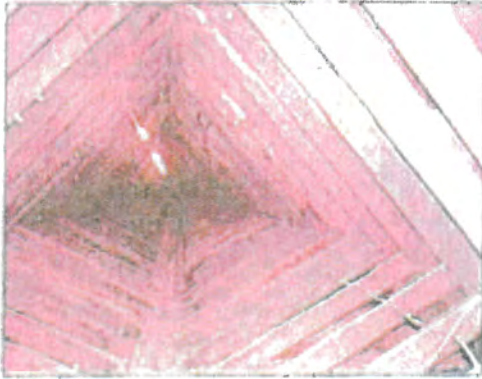
16. Interior view looking south



17. Typical of cracks in plaster.



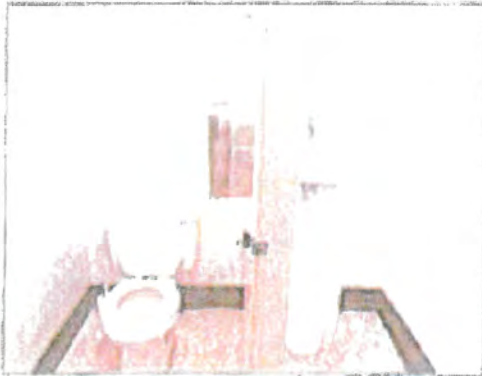
18. Typical of paint peeling from plaster surface



19. Scissor trusses in the church attic



20. View into attic perimeter. Note vertical plaster supports



21. Existing men's room.



22. Existing ladies room.



23. Annex entry is below floor line of church (foreground) with stairs leading to basement.



24. Mechanical room, twin Vaillant boilers.



25. Boiler #1 inspection date



26. Boiler #2 inspection date



27. TRANE gas fired furnices (2)



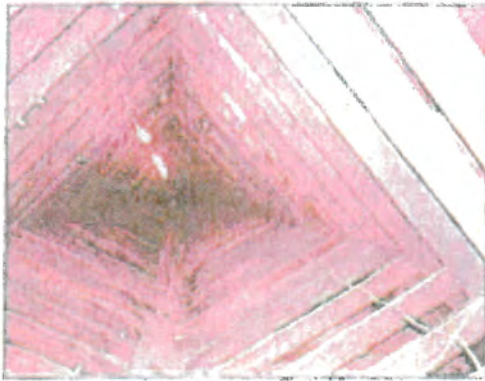
28. Basement area main church



29. Annex basement area.



30. Stairs as only access to basement level.



31 Scissor trusses in the church attic



32. View into attic perimeter. Note vertical plaster supports



33. Existing men's room.



34. Existing ladies' room.



35. Annex entry is below floor line of church (foreground) with stairs leading to basement.