

# MILITARY AVENUE MARKET ANALYSIS & CORRIDOR DESIGN PLAN



Adopted  
3/1/2011

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RESOLUTION ADOPTING  
THE MILITARY AVENUE MARKET  
ANALYSIS AND CORRIDOR DESIGN PLAN  
(PP 09-07)

March 1, 2011

BY THE COMMON COUNCIL OF THE CITY OF GREEN BAY:

WHEREAS, the Military Avenue Tax Increment Financing District was formed in 2007 for the purpose of encouraging the redevelopment of, and reinvestment in, this vital west side commercial corridor; and

WHEREAS, the Military Avenue Citizen Steering Committee was formed to engage in this planning process by assembling a diverse cross-section of Military Avenue stakeholders, including business owners and managers, property owners, neighborhood residents, lenders, and other key institutions; and

WHEREAS, the Citizen Steering Committee, on January 13, 2011, recommended by a unanimous vote the adoption of this plan; and

WHEREAS, the Green Bay Plan Commission on January 24, 2011, and the Green Bay Redevelopment Authority on February 24, 2011, passed resolutions recommending adoption of this plan; and

WHEREAS, this planning process included extensive and intensive public outreach and participation, including a business survey, five public workshops, stakeholder and property owner interviews, a developer panel focus group, news media coverage, a project web site, and various forms of information sharing; and

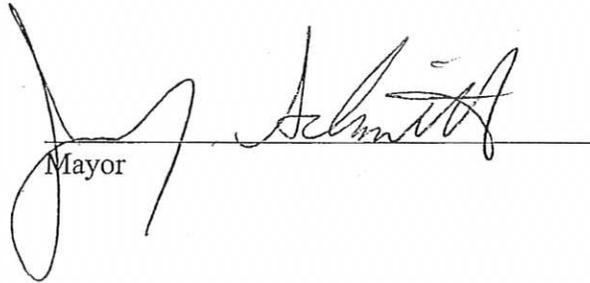
WHEREAS, this plan expresses the results of the public process - a community supported vision for the transformation of Military Avenue into a signature street with a cohesive identity through an elevated level of design, aesthetics, functionality, and safety; and

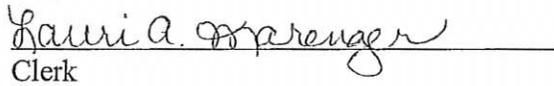
WHEREAS, this plan contains strategies and recommendations intended to grow the economy of the City of Green Bay in a way that is sustainable over the long term.

NOW, THEREFORE, BE IT RESOLVED that the City of Green Bay adopts the Military Avenue Market Analysis and Corridor Design Plan, a copy of which is on file in the Clerk's Office.

Adopted March 1, 2011

Approved March 2, 2011

  
\_\_\_\_\_  
Mayor

  
\_\_\_\_\_  
Clerk

bc



Prepared for: The City of Green Bay, Wisconsin  
Adopted by the Common Council on: March 1, 2011  
Resolution No.: PP 09-07

## ACKNOWLEDGEMENTS

### Steering Committee Membership

Bryan Boettcher, Quick Signs  
Patrick Costello, Perkins Park Neighborhood Association  
Ken Davister, Bester Development  
Judy Decker, M&I Bank  
Bob DeLaruelle, John Muir Park Neighborhood Association  
Teresa Hasenohrl, Firemans Park Neighborhood Association  
Dean Kroll, Saint Mary's Hospital  
Joe Mongin, Mongin Insurance (Vice Chair)  
Greg Polacheck, Associated Bank (Chair)  
Linda Queoff, Green Bay Plan Commission  
Brian Rouse, Bay Area Diamond  
Sarah Siewert, Starbucks  
Rusanna Schweitzer, Shopko  
John Vander Leest, Brown County Board of Supervisors  
Donna Zunker, Grancare Nursing and Assisted Living

### Project Staff Team

Daniel Lindstrom, Planning Department  
Quasan Shaw,  
Economic Development Department  
Bill Lockery, Planning Department  
Derek Lord,  
Economic Development Department  
Nicolas Sparacio, Planning Department  
(Project Manager)

### Consultants

Vierbicher, Madison, WI

Special thanks to Alderman Steven Deneys (District 10) and Alderman Brian Danzinger (District 11)

We also extend our thanks to the business owners, residents, and other members of the public for sharing their hopes, concerns and ideas for the future of this area. This input served as the basis for the recommendations contained in this document.



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# CONTENTS

Executive Summary .....	7
Introduction .....	11
Process .....	15

## I. CONTEXT ANALYSIS

Historical Context .....	19
Previous Planning Documents .....	21
Regional Context & Linkages .....	29
Urban Form Analysis .....	34
Zoning & Land Use .....	41
Business & Utilization .....	49
Summary & Key Observations .....	55

## II. MARKET ASSESSMENT

Introduction .....	57
Definitions .....	57
Market Analysis Approach .....	58
Economic Role of Corridor .....	58
Stakeholder Input .....	61
Public Input .....	63
Data Analysis .....	65
Retail .....	65
Housing .....	83
Office .....	91
Summary & Key Observations .....	93

## III. VISION & ECONOMIC POSITION

Vision Statement .....	95
Economic Position of the Corridor .....	97

## IV. GOALS & OBJECTIVES

Introduction .....	103
Goals & Objectives .....	103

## V. KEY REDEVELOPMENT SITES

Introduction .....	113
Redevelopment & Infill Sites .....	113
Retrofits and Business Retention .....	126
Redevelopment Strategy & Timing .....	126
Public Input .....	127

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# CONTENTS

## VI. DESIGN GUIDELINES

introduction .....	129
Overall Corridor Design Guidelines .....	129
Public Streetscape Guidelines.....	130
Private Site Design.....	132
Sub-District Design Guidelines .....	135

## VII. ACTION PLAN

Overview .....	139
----------------	-----

## MAPS

Map i.1: Study Area .....	13
Map 1.1: TID Tax Increment District #16 Boundary .....	27
Map 1.2: Regional Context .....	29
Map 1.3: Regional Traffic Flow.....	31
Map 1.4: Urban Form Analysis.....	37
Map 1.5: Zoning.....	45
Map 1.6: Land Use .....	47
Map 1.7: Improvement Value to Land Value.....	51
Map 1.8: Improvement Value Per Acre .....	53
Map 2.1: Neighborhood Trade Area .....	66
Map 2.2: Primary Trade Area .....	66
Map 2.3: Secondary Trade Area.....	67
Map 2.4: Tertiary Trade Area .....	67
Map 2.5: Supply Nodes .....	68
Map 2.6: Commuters to Green Bay.....	79
Map 3.1: Sub-District Map .....	101
Map 4.1: Streetscape & Signage Improvements .....	105
Map 5.1: Key Redevelopment Sites .....	115

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# CONTENTS

## FIGURES

Figure P.1: Project Structure .....	16
Figure 1.1: Aerial Image, 1938.....	19
Figure 1.2: Aerial Image, 1960.....	20
Figure 1.3: Aerial Image, 2006.....	21
Figure 1.4: Military Avenue Reconstruction .....	25
Figure 2.1: Customer Origin- Top Ranked.....	60
Figure 2.2: Customer Origin- Second Ranked.....	60
Figure 2.3: Major Challenges Facing Business Owners .....	62
Figure 2.4: New Businesses that Could Benefit Existing Businesses.....	63
Figure 2.5: Average Household Size, United States.....	83
Figure 2.6: General Migration Trends by Age (United States).....	85
Figure 2.7: Metro/Nonmetro Migration Trends by Age- United States.....	85
Figure 2.8: Projected Change in Age Distribution .....	89
Figure 4.1 Public Right Of Way Aesthetic Improvements .....	103
Figure 4.2: Gateway Features.....	107
Figure 4.3: USH 41 & Mason Street Preliminary Design .....	107
Figure 4.4: Property Information .....	108
Figure 4.5: Pedestrian Safety.....	110
Figure 5.1: St. Mary's Hospital Expansion Plan Phases I-III .....	114
Figure 5.2: Cub Foods Site Concept Plan.....	117
Figure 5.3: Cub Foods Site Concept Plan Phase I .....	118
Figure 5.4: Southwest Corner Military & Mason Concept Plan .....	119
Figure 5.5: Green Bay Plaza Short Term Concept Plan.....	120
Figure 5.6: 9th Street & Military Avenue Concept Plan .....	122
Figure 5.7: 9th Street & Military Avenue Concept Plans .....	123
Figure 5.8: Green Bay Nursery Site Concept Plan .....	123
Figure 5.9: Fencing Buffer .....	124
Figure 5.10: Lombardi Gateway Concept Plan .....	125
Figure 5.11: Public Plaza .....	125
Figure 6.1: Tree Canopy .....	130
Figure 6.2: Terrace Planting.....	131
Figure 6.3: Blockface Design.....	131
Figure 6.4: Rear Parking Layout .....	132
Figure 6.5: Parking Lot Buffer .....	132
Figure 6.6: Building Orientation.....	133
Figure 6.7: Pedestrian Lighting.....	133
Figure 6.8: Stormwater Raingarden .....	133
Figure 6.9: Monument, Shared & Building Mounted Signage .....	134
Figure 6.10: Architectural Elements.....	134
Figure 6.11: Outlot Buildings .....	135
Figure 6.12: Minimum Setback.....	136
Figure 6.13: Individual Entrances, Small Unit Groupings .....	136
Figure 6.14: Grade Separated Entrance, Defined Front Yard Area.....	137

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# CONTENTS

## TABLES

Table P.1: Project Timeline.....	18
Table 1.1: General Land Use.....	42
Table 2.1: General Business Mix .....	59
Table 2.2: Detailed Business Mix .....	59
Table 2.3: Product Categories.....	69
Table 2.4: Master Indicator Report.....	71
Table 2.5: Capture of Local Demand.....	75
Table 2.6: Attract Outside Demand.....	76
Table 2.7: Attract Outside Demand.....	77
Table 2.8: Future Potential.....	78
Table 2.9: Commuting Potential.....	80
Table 2.10: Retailer Siting Requirements.....	81
Table 2.11: General Population Estimates and Projections.....	83
Table 2.12: Householder Age Distribution.....	84
Table 2.13: Change in Age Cohort.....	84
Table 2.14: Housing Type By Age 2010 .....	86
Table 2.15: Age Cohort By Income: Change Between 2010 and 2015.....	86
Table 2.16: Change in Race and Ethnicity .....	87
Table 2.17: Senior Housing Analysis .....	88
Table 2.18: Employees by Industry Sector .....	93
Table 5.1: Redevelopment Site Prioritization.....	127
Table 7.1: Summary of Plan Goals and Objectives.....	139
Table 7.2: Action Items .....	142

## APPENDICES

Appendix 1 - Retail Data Analysis Tables .....	a3
Appendix 2 - Results from Workshop #1 .....	a15
Appendix 3 - Business Survey Results.....	a29
Appendix 4 - Stakeholder Interview Summary .....	a37
Appendix 5 - Neighborhood Interview Results .....	a41
Appendix 6 - Results From Public Meeting #4 .....	a45
Appendix 7 - Design Guidelines Gap Analysis.....	a49

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## EXECUTIVE SUMMARY

### The Next 50 Years... Beyond the Curb

The Military Avenue Market Analysis and Corridor Design Plan seeks to understand the current business climate and to envision a bright, sustainable future for this vital west side arterial street and economic engine. While there are many longstanding retailers, service providers, offices and other businesses located along Military Avenue, the corridor is now facing many challenges and showing signs of its age. This plan represents the community's recognition that Military Avenue has reached a vital crossroads. The time is now to better position Military Avenue for its next 50 years of growth and change. The first step was to reconstruct the physical elements of the street itself. With the reconstruction complete, the next opportunities for positive change lie beyond the curb.

### Overview and Purpose

This traditional, automobile-oriented retail corridor has served the surrounding community and region since its construction as part of USH 41 in the 1960s, and its continued strengths are apparent. New businesses continue to locate on Military Avenue with recent examples like Big Lots, Walgreens, and the Parkside Animal Care Center. Existing businesses continue to invest in improving their properties. Two recent



examples are the complete reconstruction of the McDonalds restaurant and façade improvements at the Golden Basket restaurant. Longtime Military Avenue establishments including Northeast Wisconsin's most popular TJ Maxx store and the original Shopko store have renewed their commitments to the corridor by participating directly in this planning process or by recently renewing leases.



Military Avenue's physical position within the community is perhaps its most unique strength and a key source of its potential competitive advantage. Military Avenue is integrated with the urban fabric of Green Bay. Residential neighborhoods are convenient to its stores, restaurants, offices, transit stops and places of employment. While suburban retail areas in the Green Bay metropolitan area struggle to create neighborhood and customer connectivity, Military Avenue already has bicycle lanes, abundant sidewalks and a functional density of surrounding development. Whether or not the automobile continues to dominate the future of transportation, Military Avenue is geographically positioned to serve an important role in the new economy.

This planning process was engaged to accentuate the corridor's strengths and address its challenges, which are also apparent. With the introduction of regional shopping malls and construction of the USH 41 bypass, Military Avenue began to lose its position as a primary retail destination. Vacant buildings, a proliferation of "cash stores" and low lease rates were cited as top community concerns. While the surrounding neighborhoods still represent a stable population base, and many corridor retailers have a dedicated customer base, many buildings along the corridor are in need of physical improvements and aesthetic upgrades. The City formalized its interest in revitalizing this key arterial by forming the Military Avenue Tax Increment Financing District in 2007.

### The Plan

The plan for Military Avenue is to transform the corridor into a signature street with a cohesive identity. This will be accomplished by



elevating the level of aesthetics, functionality and safety with improved site and building design. The balance of land uses along Military Avenue must shift in recognition of current and expected future market conditions and to better manage the supply and demand of real estate. Sections of the corridor near Mason Street and Shawano Avenue will be enhanced as centers for automobile-oriented, regional and national retailers. Other sections of the corridor will transition to finer blocks of mixed-use development that better relate to the scale of surrounding neighborhoods. Some



properties will transition to residential, office and civic uses, bringing more customers to the area. The intersection of Mason and Military will be a focal point for community investment in revitalization, but public-private partnerships, such as formation of a Business Improvement District, will also be vital to success.

Implementation of this plan will result not only in attracting new businesses to Military Avenue, but also in creating an environment that supports the continued success of existing, beneficial businesses. Limited amounts of redevelopment may result in tear down and reconstruction. But in most cases, redevelopment will occur in smaller steps like landscaping parking areas, upgrading building façades, or adding decorative lighting. Military Avenue will become a more complete corridor that caters to local residents and employees who use multiple modes of transportation. This transition is a necessary response to the changing market and context, and will create a more economically sustainable future for Military Avenue.

### The Process

This document was developed through a year-long process begun in March of 2010. This process incorporated multiple opportunities for community input, including public workshop sessions, Steering Committee meetings, focus

groups and stakeholder interviews. The Steering Committee members, who represented the diverse group of area stakeholders, guided the planning process. City of Green Bay staff was also a key participant in the process, working to ensure that the Plan was consistent with the City's larger goals.

### Organization

The Plan is organized into the following chapters:

- Context Analysis
- Market Assessment
- Vision & Economic Position
- Goals & Objectives
- Key Redevelopment Sites
- Design Guidelines
- Action Plan

Highlights from each of these chapters are provided in the remainder of this summary.

### Context Analysis

The context analysis chapter discusses overall regional growth and circulation patterns and corridor-specific observations. Existing amenities, anchors and landmarks were identified that can serve as a foundation for future growth. The chapter also looks at the array of existing plans that include reference to Military Avenue. These plans encompass a variety of projects that will impact the future shape of the corridor including the Lambeau Field expansion, USH 41 reconstruction and the Green Bay Smart Growth 2022 Plan. The recommendations and impacts of these projects were all considered within the context of Military Avenue projections. This chapter also includes an analysis of existing zoning and land use patterns, which will be compared against future recommendations to identify necessary adjustments.





Identified corridor strengths include existing traffic volume, high surrounding population density, existing medical industry cluster, and proximity to multiple traffic generators. Weaknesses identified include significant competing retail centers, aesthetic challenges, lack of visual and brand consistency and an oversupply of certain marginal retail subcategories.

### **Market Assessment**

The market assessment chapter breaks down the existing economic drivers for the Military Avenue corridor. This assessment builds on the physical context through an in depth look at the retail, residential and commercial markets along the corridor. A special focus is placed on identifying the corridor trade area, quantifying current potential future demand and identifying supply gaps within each property sector.

### Retail

The existing business mix on Military Avenue is split between professional and consumer service establishments, with a secondary focus on specialty and destination merchandisers. There are also several national and regional retailers present. The primary customer base is split evenly between surrounding neighborhoods and the broader Green Bay Metro area. Based on these findings, the neighborhood trade area was drawn to include generally the western side of the City of Green Bay. A spending analysis determined that just less than 40 percent of overall neighborhood spending is captured within the corridor. The primary trade area, which is larger than the neighborhood trade area, was drawn to include the entire City of Green Bay, northern Brown County, and a portion of the five adjacent counties. Consumers from this trade area would come to the corridor for specialty shopping or as a component of other special purpose trips. These two trade areas make up a majority of spending for Military Avenue retailers.

Specific retail categories that are underserved in one or both of these two trade areas (based on average household spending), identified in Table 2.4 and in Observation Four on page 81 of this document include: Books, Computers, Optical, Restaurants, Footwear, Groceries and Alcoholic Drinks (bars, pubs). There may be opportunities to attract businesses that can capture additional market share within these underserved retail categories.

### Housing

The existing housing supply consists of primarily single family residential properties within surrounding neighborhoods. Pockets of multi-family housing also exist and include several apartments, assisted living and nursing facilities. This housing is generally located adjacent to the cross streets, with a significant concentration along Western Avenue.

A detailed demographic analysis of the adjacent residential areas over the next five years identified the highest growth rate within households making greater than \$100,000 per year (Table 2.15). Entry level employees, people nearing retirement and recent retirees currently represent the most predominant demographic profiles. Based on these trends as well as national projections, the demand for senior housing of



all types will increase significantly over the next several decades. The large population under age 35, coupled with recent financing changes also illustrate a future need for additional rental housing units. An estimated 600 new owner-occupied units (refer to Housing Type by Age in Chapter 2) and 211 additional assisted and nursing care spaces (refer to Senior Housing and Table 2.17 in Chapter 2) are needed by 2015.

### Office

The supply of traditional office space is very limited within the Military Avenue corridor. A



few larger office properties exist on Shawano Avenue in proximity to St. Mary's Hospital and at the Military Avenue and Lombardi Avenue intersection, but the majority of office tenants are located within retail centers. Based on industry clusters and growth projections, demand for additional office space is expected to be in the medical sector. The remaining demand for new office space will likely be satisfied within existing retail vacancies, especially as the addition of newer retail space creates new vacancy in older centers.

### **Vision & Economic Position**

The vision for Military Avenue provides a glimpse of the future of the area, assuming implementation of the key components of this plan.

### **Goals & Objectives**

This chapter provides goals and objectives that will move the corridor toward the identified vision through manageable projects and milestones.

Goals and objectives in this chapter concern two main elements: creating an experience unique to Military Avenue, and enhancing the economic vitality of the corridor. Experiential elements intended to create a distinct sense of place include: creation of an expanded marketing effort, the addition of pedestrian amenities and wayfinding signage, and installation of amenities designed to maximize visitor convenience and encourage business clustering.

Recommendations focused on enhancing economic activity within the corridor are geared towards making Military Avenue a desirable



location for redevelopment and leasing activity. Goals and objectives discuss economic development ideas that are targeted to boost district strengths in recruiting and retaining target business sectors. The plan also outlines several strategies to expand the customer base and increase property utilization through the addition of infill office and residential users and expansion of the medical industry within the district.

### **Key Redevelopment Sites**

Twelve key redevelopment sites (as shown on Map 5.1) are identified representing significant opportunities for the creation of successful projects within the corridor. Additional concept planning is provided for top priority sites identified by the steering committee.

### **Design Guidelines**

This chapter lays out recommendations to help achieve the aesthetics and functionality set forth in the vision statement. Design guidelines create a more stable and predictable environment for future private investment. Design elements included in the guidelines range from site layout to architectural elements, façade treatments and landscaping. Depending upon continued growth in stakeholder consensus, each guideline may be used either as part of a formal design review process, or as a reference guide for developers and property owners in the corridor. The design recommendations include a set of general corridor-wide guidelines as well as additional guidelines for specific sub-districts. Guidelines were created for both public right of way and private properties.

### **Action Plan**

The action plan chapter further refines the goals and objectives through the identification of individual action items necessary to successfully implement each recommendation. Action items identify priority, responsible party and timeframe for completion. This section of the document provides a blueprint for local stakeholders to follow as they work toward successful long-term revitalization of the Military Avenue corridor.



## INTRODUCTION

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The Military Avenue Corridor (the Corridor) is a three mile commercial street located on the City of Green Bay's west side. Map i.1 displays the study area and a recent aerial image of the corridor. As part of the USH 41 system in the 1960s and 70s, Military Avenue was a bustling commercial strip that drew shoppers from as far away as the Upper Peninsula of Michigan. Over time, new commercial development began to spring up closer to Lambeau Field along Oneida Street and the Bay Park Square Mall area, putting increasing competitive pressure on retailers along the Corridor. That pressure combined with the new USH 41 bypass west of the Corridor led to a decline in retail activity for Military Avenue businesses. Despite its important place in the history of Green Bay's growth, changes in the regional transportation network and development patterns have diminished traffic in the Corridor and have caused a general decline in business vitality.

Today, Military Avenue is showing signs of its age. Many of the buildings and signs are original structures, and are worn by the elements. Development and streetscaping along the Corridor lack a cohesive theme or palette and would benefit from enhanced continuity and uniqueness. Car traffic dominates the Corridor, as evidenced by a wide street cross-section and vast parking lots. Free standing signs, unremarkable "big box" style buildings, and large surface parking lots create an environment that lacks visual appeal and compromises pedestrian safety.

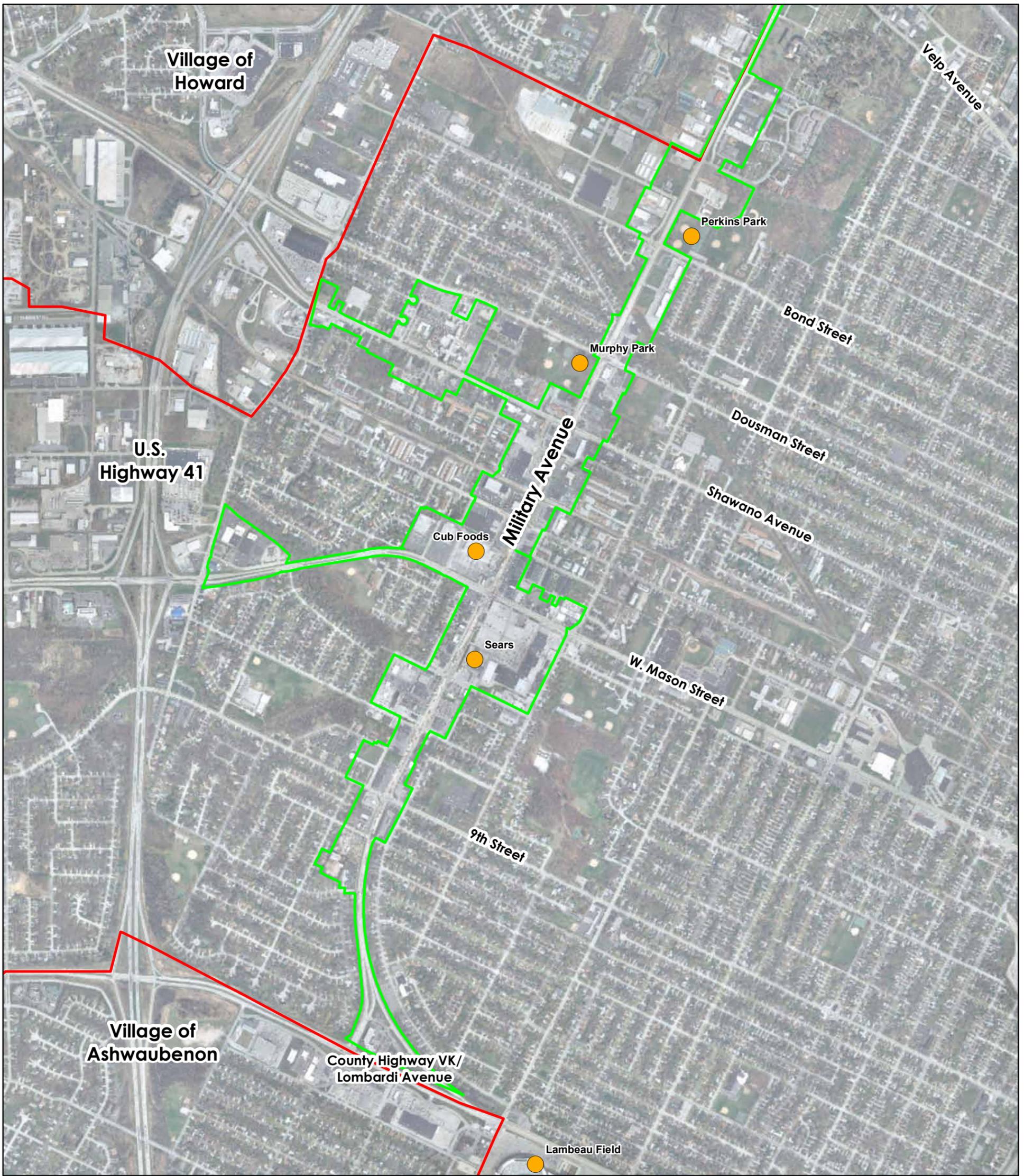
Although the Corridor has many long standing tenants, some segments of Military Avenue have comparatively low traffic volumes and lack destination retail. This means that some successful businesses quickly seek other locations, creating high turnover. Property owners are struggling with increasing vacancies and low lease rates.

### **Reconstruction**

Reconstruction of Military Avenue was completed in 2010, transforming the six-lane arterial street into a multi-modal environment with increased green space and improved infrastructure for pedestrians and bicyclists. The reconstruction plan resulted in moving traffic more efficiently throughout the corridor by reducing the street width to four lanes of motor vehicle traffic, adding bicycle lanes on each side of the street, using new traffic signal technology, and implementing traffic calming measures to enhance safety. This approximately \$12 million reconstruction will begin to reshape the Military Avenue business district into something new with the potential to better serve both the surrounding neighborhoods and the community beyond.

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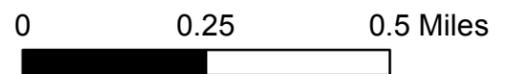




# Map i.1: Study Area

January 2011

- Green Bay City Boundary
- Military Avenue Study Area Boundary
- Military Avenue Area Landmarks



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## PROCESS

### Planning Process and Public Participation

This plan is the result of grass-roots effort and represents the culmination of discussions by Military Avenue businesses and property owners going back to at least 2006. Given these origins, this planning process was designed to be a community-driven effort with great attention given to public participation and consensus building.

The ultimate goal of this process is to create a new vision that guides future development “beyond the curb” of the new street. This is to be achieved through cooperation between the City, local residents, business owners, and other stakeholders to develop a consensus for the future of Military Avenue, ensuring that the reinvestment in the infrastructure of Military Avenue spurs continued economic growth. Specifically, the process was designed to achieve the following:

- Create a community-supported and market tested redevelopment vision
- Include a strong implementation component
- Develop site and building design guidelines
- Create a plan that is sustainable for the long term
- Capitalize on all modes of transportation



The planning process began with an engagement of Military Avenue stakeholders for the purpose of involving all interested citizens in the discussion. The following stakeholder groups were identified and engaged during the planning project.

- Businesses
  - Local-serving retail and services
  - Regional destination retail and services
  - Light industry, larger employers
  - Major franchise retailers
  - Independent retailers
  - Military Avenue Business Association members and non-members
- Residents
  - Neighborhood Associations (Perkins Park, Firemans Park, and John Muir Park NHAs)
  - Area residents at large
- Lenders
- Real estate professionals and developers
- Institutions
  - Medical care providers
  - Community non-profit organizations



- Property owners
  - Larger and smaller tracts
  - Properties of any size with infill potential
- Property lessees and renters
- Elected and appointed officials
  - City Council
  - Plan Commission
  - Redevelopment Authority



A Citizen Steering Committee with representation of each of these stakeholder groups was formed as the vehicle for directly involving the community in developing the draft corridor plan.

A diversity of viewpoints and values were expected to come from Military Avenue stakeholder groups, so a project structure was established to identify project roles and to help resolve differences of opinion. In Figure P.1, the black lines indicate the flow of approval for the final corridor plan. The grey lines indicate opportunities for community participation and dialogue. Community participation forms the foundation for the planning process. The most abundant opportunities for community participation and dialogue will flow through the Citizen Steering Committee, however, all meetings of the Redevelopment Authority, Plan Commission, and City Council are also open meetings where public comment opportunities are provided for items on their agendas.

A truly grass-roots and community-driven planning effort must engage citizens in multiple ways and at various levels of intensity. Some public participation tools set out to simply inform people, while others are intended to put the decision making directly in the hands of citizens. The Military Avenue Market Analysis and Corridor Design Plan achieved this through the following public participation tools.

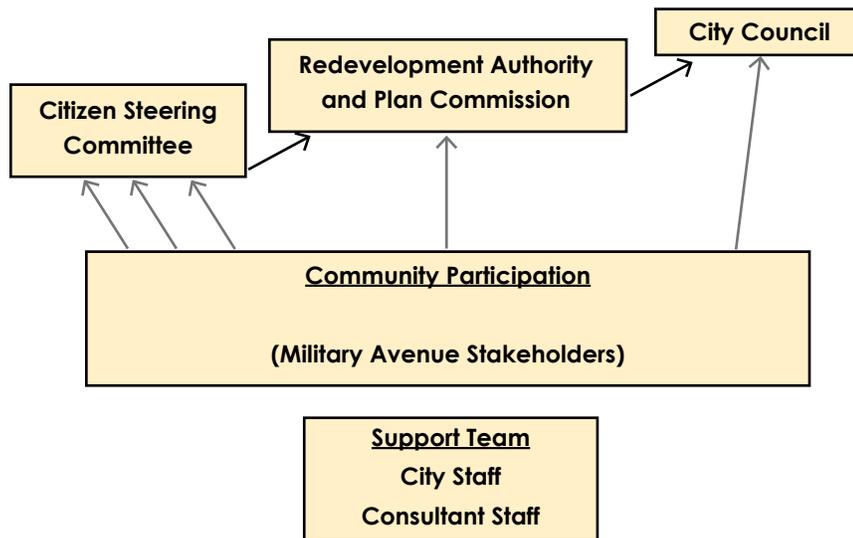
Public Awareness and Education Tools

- Project website, Facebook, and Twitter pages established and maintained
- Direct mailed public workshop invitations sent to about 1,200 area property owners
- Public workshop fliers distributed to about 200 businesses
- Regular news releases and press coverage provided throughout the duration of the project

Public Input Gathering Tools

- Business opinion survey sent to about 200 businesses
- Stakeholder interviews conducted with about 20 area business and neighborhood representatives
- Developer panel and business panel focus groups conducted
- Property owner interviews conducted for about 15 sites affected by concept redevelopment plans
- Five major public workshops conducted asking for input on all aspects of the corridor plan and providing feedback loop for changes made based on input

FIGURE P.1: PROJECT STRUCTURE



DRAFT

### Public Decision Making Tools

- Citizen Steering Committee utilized as the primary body responsible for developing the draft plan – monthly meetings held which were open to the public
- Plan Commission and Redevelopment Authority, citizen-based standing committees of the City, involved in guiding the process and accepting the final plan
- Elected officials of the City Council adopting final plan

The specific results of public participation activities are found throughout this document and in the appendices.

With this foundation of public participation in mind, the major steps in the planning process included the following.

- Analysis of existing physical and economic context
- Development of corridor vision and goals
- Formulation of redevelopment priorities and transformative opportunities
- Creation of design guidelines for future development
- Development of implementation plan
- Facilitation of plan adoption

## **PROCESS TIMELINE**

Table P.1 provides an overview of the steps that were taken during the eleven-month planning process that occurred between March, 2010 and February, 2011.

**Citizen Steering Committee:** The Steering Committee met 14 times and provided oversight and project guidance as well as aiding in the development of concrete recommendations formulated to work within existing policy and structural frameworks.

**Large-Scale Public Meetings:** Five public meetings were conducted over the course of the project to gather input on various topics including land use, key redevelopment sites, project prioritization and design guidelines.

**Stakeholder Interviews & Focus Groups:** Twenty stakeholder interviews were conducted with local business owners, developers and neighborhood representatives to measure existing perceptions and identify opportunities and challenges facing the corridor. A follow-up focus group was conducted with developers and brokers to review initial findings and discuss preliminary recommendations.

**Business Survey:** A survey was distributed to businesses within the Military Avenue corridor to identify issues facing existing businesses and perceptions of strengths and weaknesses from a business location perspective.

The valuable input from these various sectors resulted in a tailored set of solutions designed to perform within the Green Bay and Military Avenue economic and regulatory environment. The tangible result of this series of meetings was a coordinated vision and comprehensive set of goals and objectives for moving Military Avenue forward.



TABLE P.1: PROJECT TIMELINE

Event	Date	Topics Addressed
Steering Committee Meeting	March 23, 2010	Roles & Responsibilities
Public Meeting	March 25, 2010	Project Kick Off Meeting
Steering Committee Meeting	April 8, 2010	Public Meeting Followup & Business Survey
Plan Commission Meeting	May 10, 2010	Planning Process Update
Redevelopment Authority Meeting	May 11, 2010	Planning Process Update
Steering Committee Meeting	May 13, 2010	Existing Conditions & Market Analysis
Stakeholder Interviews	Week of May 17th, 2010	Corridor Opportunities & Challenges
City Council Report	May 18, 2010	Planning Process Update
Public Meeting	May 20, 2010	Existing Conditions & Market Analysis
Steering Committee Meeting	June 17, 2010	Results of Business Survey & Stakeholder Interviews
Steering Committee Meeting	June 29, 2010	Continue Review of Draft Context and Market Analysis
Steering Committee Meeting	July 8, 2010	Vision & Goals, Sub-District Boundaries
Focus Group Interviews	Week of July 26, 2010	Developer & Broker Perception of Market
Public Meeting	July 29, 2010	Vision, Goals & Objectives
Redevelopment Authority Meeting	August 10, 2010	Planning Process Update
Steering Committee Meeting	August 12, 2010	Focus Group & Public Meeting Results
Plan Commission Meeting	August 23, 2010	Planning Process Update
City Council Report	September 7, 2010	Planning Process Update
Steering Committee Meeting	September 9, 2010	Design Guidelines
Steering Committee Meeting	September 30, 2010	Redevelopment Priorities
Public Meeting	October, 13, 2010	Design Guidelines & Redevelopment Tools
Steering Committee Meeting	November 11, 2010	Draft Implementation Strategy
Steering Committee Meeting	December 9, 2010	Review Draft Plan Document
Public Workshop	December 16, 2010	Present Draft Plan
Steering Committee Meeting	December 16, 2010	Results of Public Meeting
Steering Committee Meeting	January 13, 2011	Recommend Approval of Plan
Planning Commission Meeting	January 24, 2011	Present Corridor Plan
Redevelopment Authority Meeting	February 24, 2011	Present Corridor Plan
City Council Meeting	March 1, 2011	Present Corridor Plan

# I

## CONTEXT ANALYSIS

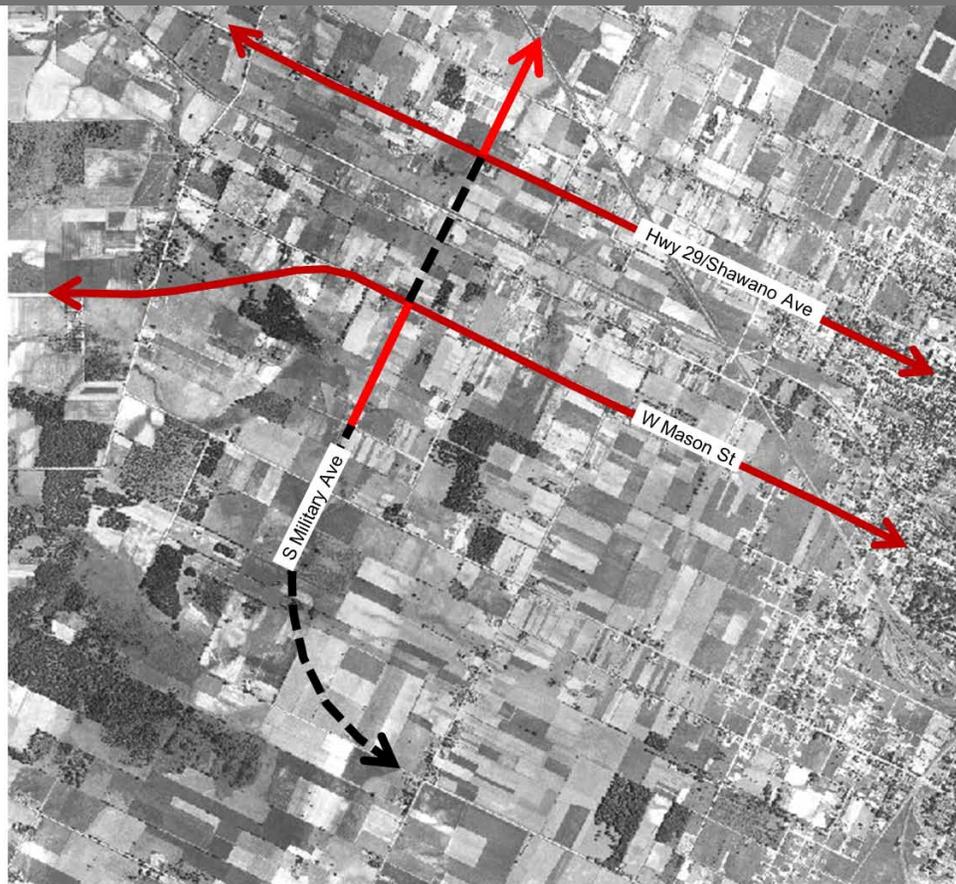
Understanding the current conditions and historical progression of Military Avenue and the surrounding area is essential to developing a framework and basis for conducting a market analysis, and making an assessment of how to best improve the Corridor. This context is made up of the physical context, information about the Corridor's location, its inherent characteristics, linkages with other parts of the city and region, and the history of how it came to look the way it does. A discussion of the economic context, demographics, retail characteristics, and the market analysis methodology will complete the context analysis.

### HISTORICAL CONTEXT

Historical images of the Military Avenue Corridor area indicate significant growth of the infrastructure network and residential neighborhoods from the east near downtown Green Bay toward Military Avenue to the west (see Figures 1.1-1.3). Military Avenue itself was built during the time period between 1938 and 1960, providing a north/south route that bisects the existing major east/west routes of Shawano Avenue and Mason Street. Additionally, from 1938 to 1960, there was a large amount of single family residential development that occurred east of Military Avenue primarily north of Shawano Avenue and south of West Mason Street. This residential development is consistent with the national trend of increasing post-World War II residential home construction. By 1960,

FIGURE 1.1: AERIAL IMAGE, 1938

Dashed black lines indicate portions of Military Avenue not yet built.

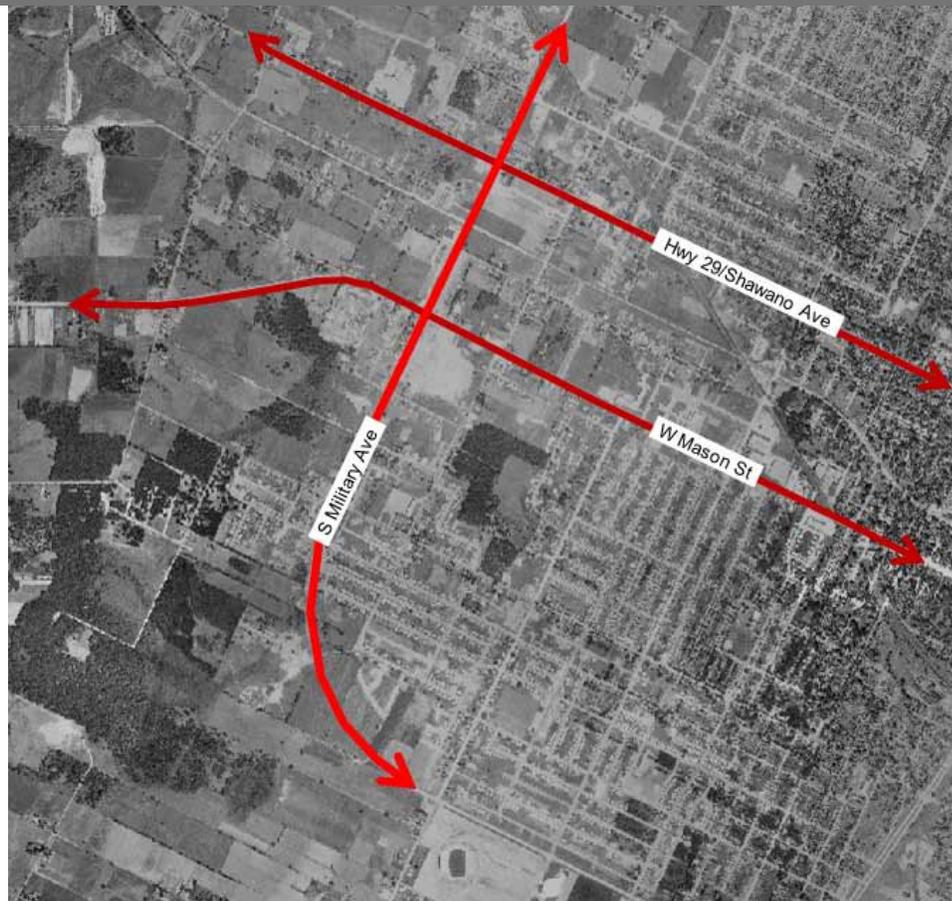


residential development essentially reached from downtown Green Bay on the east to Military Avenue on the west.

Since 1960, the area has seen residential development stretch across Military Avenue into areas to the west. Other development occurring since 1960 includes the bulk of the commercial development along Military Avenue, particularly in those areas near the intersection of Mason Street and Military Avenue, and along Military Avenue between Mason Street and Shawano Avenue. This part of the corridor serves as the primary central hub of commercial activity to this day. Finally, US-41, built since 1960, provides a major thoroughfare linking the Green Bay Metropolitan Area with the rest of the Fox Valley and the state.

The large influx of commercial development in the area happening after 1960 occurred during a prosperous time when personal automobiles dominated and the retail economy was thriving. The establishment of Military Avenue as a central commercial retail district rooted in a residential neighborhood is evident in these photos. These factors work to explain Military Avenue's general appearance as a corridor dominated by large, cluttered signage, wide travel lanes, minimal landscaping, box-style buildings, and large surface parking lots. The residential development that has built up to the east and west of Military Avenue as seen in these historical images creates opportunities and challenges for the Corridor. These residential areas provide a potential source of business and a chance to use the Corridor as a way to create identity and pride in the residents that live in the immediate area.

FIGURE 1.2: AERIAL IMAGE, 1960



On the contrary, land uses along Military Avenue must be compatible with these surrounding residential areas. Heavy commercial development along Military Avenue may lead to negative effects on traffic patterns and volumes, as well as the general quality of life of citizens living in the adjacent residential areas. Given the Corridor's place in the immediate area, the affect of the development on Military Avenue on these adjacent neighborhoods must be minimized, and commercial development along the Corridor needs to be integrated with residential areas.

**PREVIOUS PLANNING DOCUMENTS**

This section presents findings gathered during the review of previous planning documents and stakeholder interviews. Previous city planning documents that directly or indirectly impact the Military Avenue Market Analysis and Corridor Design Plan process include the City of Green Bay Smart Growth 2022 Plan, the Tax Incremental Financing District Number 16 Project Plan, and documentation from past efforts of the Military Avenue Steering Committee. It is important that the analysis, goals, and vision of these plans be considered moving forward, that this plan be consistent with the comprehensive plan and TIF plan, and that this plan build on and further refine the work of the previous steering committee.

FIGURE 1.3: AERIAL IMAGE, 2006



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Green Bay Smart Growth 2022 Plan

The City of Green Bay adopted a comprehensive plan in 2003 entitled "Green Bay Smart Growth 2022 Plan." The plan meets all of the requirements of Wisconsin's Smart Growth and comprehensive planning legislation. The Military Avenue Corridor is located in District 2: Far West Side, as identified in this plan. The plan includes discussion of steps that can be taken to improve the appearance and access patterns along Military Avenue, and ways in which additional trail connections can be made across this area and other surrounding district areas. The plan cites appearance, access management, appropriate land use, and need for redevelopment, along with competition from adjacent commercial areas and excess road capacity as issues facing the Corridor. The City of Green Bay has designated Military Avenue, along with other major Corridors, as part of the City "parkway" system. The purpose of this designation is to target the Corridor for visual, landscaping, lighting, and pedestrian amenities, in addition to other improvements as redevelopment occurs into the future.

The economic development portion of this plan describes Military Avenue as an "aging commercial area" in need of revitalization. Suggested revitalization criteria include market opportunities, crime, vacancy, blight, existence of business improvement districts, and the involvement and commitment of area businesses. Revitalization of commercial corridors such as Military Avenue is to be achieved through the creation of long-range commercial revitalization plans, the involvement of area businesses, and the creation of Business Improvement Districts.

Austin Straubel International Airport / Brown County Zoning Ordinance

One important item to note from the plan is the designation of an airport height restriction area covering the area from Lombardi Avenue on the south to Dousman Street to the north along Military Avenue, as well as areas to the east and west of the street. This restriction is the subject of Brown County Ordinance Chapter 24 entitled "Airport Zoning Districts." The ordinance states that no growth, tree, or structure may exceed the height limitations displayed on the "Airport Zoning District Map Atlas and Airport Zoning District Maps, Austin Straubel International Airport, Brown County, Wisconsin," maintained by the Brown County clerk and the Airport Director's office. The height limitations are specific to a proposed development parcel based on the

actual ground elevation. In the Military Avenue area (Height Limitation District C), any structure over 50 feet in height must be approved with an airport height permit, which involves a local review process with the airport staff. Any structure over 100 feet in height requires a local airport height permit and an FAA determination of "no hazard to navigation." These height limitations include the height of construction cranes. A local airport height permit must be reviewed within 10 days, but the FAA review takes about 6 weeks on average. Actual approvable heights for the local review process are well over 100 feet in the Military Avenue area (depending on the ground elevation of the site), therefore, airport height permits for structures between 50 and 100 feet are generally approvable. For structures over 100 feet, the results are a little less predictable, as the FAA is reviewing for other factors beyond the ground elevation of the building site.

Military Avenue Steering Committee: June 2007 Progress Report

In 2006, the City of Green Bay solicited area business owners and property owners as volunteers to serve on the Military Avenue Steering Committee. The group met regularly over a six-month period with the intention of developing ways to improve the appearance of the Military Avenue Corridor. The ideas and recommendations generated during Steering Committee meetings were then reviewed at a public workshop, and formed the basis for a Tax Increment District project plan for the Corridor. Following is a summary of the Progress Report, published in June 2007, and meeting minutes and presentations from February 6 and May 10, 2007 meetings of the Steering Committee.

The Steering Committee initially identified the following challenges on the Military Avenue Corridor:

- Businesses need updating
- Bus stops in traffic lanes
- Pedestrian/bike limitations
- People travel at high speeds
- Access to properties
- No theme, brand, charm, continuity
- Portions lacking curb and gutter
- Too much concrete
- Overhead lines and streetlights are ugly

The Committee also offered the following suggestions to the concerns identified above:

- Improve Streetscaping
- Attract anchor businesses
- Create TIF District
- Attract destination businesses
- Retain large retailers
- Install directional signage
- Reduce number of lanes
- Offer better variety of restaurants
- Clean up surrounding properties
- Eliminate access road from Mason to 6<sup>th</sup> Street
- Invest in holiday decorations

Notably, Committee members felt that significant changes were needed to improve the intersection at Military Avenue and Mason Street. According to business owners in this area, customers were having trouble accessing their businesses because of queued traffic at the stop light. Points of access into businesses along the Corridor were also an important issue. Committee members did not want to further restrict access and, in fact, mapped locations where they felt additional access points were needed.

All members agreed that an improved streetscape would help enhance the area's image and accessibility. Desired improvements included modern landscaping features, better pedestrian access throughout the district, and unique amenities that help create continuity, such as lighting features or district signage.

Overall goals for Military Avenue included developing a stronger, more vibrant commercial district, creating a design that encourages people to drive safely, and better accommodating pedestrian traffic.

Two public meetings were held as part of this planning process: one informational, and one for feedback on Steering Committee recommendations. A majority of the attendees who gave feedback preferred:

- Decorative crosswalks only at busy intersections
- Benches and trash receptacles only at focal points of interest and near clusters of trees
- Pedestrian refuge islands at appropriate intersections
- Bus shelters with an enclosed design over open structures
- Landscaping, or "greening", of the Military Avenue Corridor

- Some type of unique light fixture, especially one with a banner display
- A five-lane roadway with two travel lanes in each direction and a center lane for cross-traffic turns or a landscaped boulevard, depending on local conditions. The number of access points should not be reduced.

Feedback gained through these public meetings is congruent with the design fundamentals proposed for Military Avenue as a "parkway." This sentiment was expressed in the reconstruction design of the Corridor and will help to inform the work done in this Military Avenue Market Analysis and Corridor Design Plan. Recommendations to frame Military Avenue as a viable and lively future commercial destination, to attract businesses and customers, and to create a unique sense of identity must be consistent with the desires for aesthetic improvements presented by the Military Avenue Steering Committee.

*Tax Increment Financing District #16: Military Avenue Revitalization Project Plan*

The report entitled "Tax Increment District #16: Military Avenue Revitalization Plan," was completed in June 2007 and details the implementation methods of proposed improvements within Tax Increment Financing (TIF) District #16. All proposed improvements included in the project plan were established with the intent of attracting private investment. TIF #16 includes a majority of the commercial parcels in the Military Avenue Corridor, stretching from just south of Langlade Avenue to north of Bond Street and including portions of the Canadian National railroad right-of-way (intended for a future multi-use trail). Refer to Map 1.1 for the location the TIF district boundary. All proposed improvements and recommendations are meant to make Military Avenue a more competitive commercial and retail district. The plan makes several recommendations for improvements related to public works issues, including:

- Improving infrastructure, incorporating district signage and identification measures,
- Engaging in improved administration, promotion, and marketing of the Military Avenue Corridor as a commercial destination open for private investment and tax growth,
- Working to assemble, acquire, and relocate parcels for development, and
- Providing loans and/or grants to developers and businesses.

The plan discusses the economic feasibility



and projections of the tax increment value based on estimations of the private investment expected in TIF 16. Projections of tax increment are separated into those resulting from primary public projects, which are expected to occur during the life of the TIF, and secondary projects, which are more speculative. No secondary projects were included in the tax increment projections, as these projects will not materialize unless it is certain that enough of a tax increment is generated to cover all the costs of the primary projects. Primary projects have a higher likelihood of being completed, with projects defined, developers chosen, and preliminary design work completed in many cases. Tax increment projections for primary projects show the addition of over \$57 million in the total equalized value of the TIF district over the life of the TIF. According to the plan, tax increment district #16 will pay \$3.5 million in 2009 and 2010 for street reconstruction and streetscape improvements. Other projects paid for by TIF dollars and conducted on an ongoing basis include district signage and identification, district promotion, administration and marketing, parcel assemblage, property acquisition and site preparation, and the provision of loans and/or grants to businesses and developers. It will be essential to leverage the TIF dollars being spent and align them with the goals and objectives put forth in this study. Lastly, the plan discusses the costs of making the proposed public improvements, as well as the repayment of these costs, over the duration of the TIF.

### **Private and Public Projects and Investments Affecting the Corridor**

#### Tax Increment Financing District #16

Proposed district-wide public investments into TIF #16 are meant to increase development opportunities, improve the utilization of property in the district, and increase the overall economic vitality of the area. Proposed public improvements include infrastructure improvements such as reconstructing the roadway and adding streetscape amenities, investment in promoting Military Avenue as a destination-shopping district through prominent signage and identification, engaging in the marketing of the district to both consumers and developers, assembling parcels, acquiring property, preparing sites for redevelopment, and making loans and grants available to property owners and developers making improvements.

#### Wisconsin Department of Transportation (WisDOT) US Highway 41 Construction Project

Construction on USH 41 in Brown County will affect nearly fourteen (14) miles of roadway from 2010 to 2017. Beginning in 2011-2012, WisDOT will re-route north/south USH 41 traffic to Military Avenue as the intersections of USH 41 with Mason Street and STH 29/Shawano Avenue are reconfigured in 2012 and 2014, respectively. Military Avenue will be used as the posted alternate route for north/south USH 41 traffic for four years during road construction, bringing increased traffic and exposure to the Corridor. It is important for Corridor businesses to capitalize on this increased traffic in order to validate this area as a sustainable environment for commuter-oriented business and retail services. This temporary construction project has the potential to bring new opportunity and private investment to the Corridor.

Map 1.3 displays the anticipated flow of traffic after proposed changes are made. Proposed changes include adding roundabouts at the interchanges of USH 41 and Lombardi Avenue, as well as STH 29/Shawano Avenue, and Mason Street. Proposed improvements include having vehicles enter and exit USH 41 from both Lombardi Avenue and Mason Street via a roundabout. That is, vehicles entering and exiting USH 41 will meet at a roundabout before proceeding. At the STH 29/Shawano Avenue interchange, the proposed improvements are more complex, and can again be seen on Map 1.3. West of USH 41, STH 29/Shawano Avenue will be split into a northern and southern portion from USH 41 west to Cardinal Drive/South Memorial Drive. Those coming from the north and exiting at STH 29/Shawano Avenue will enter a roundabout upon exiting and may either travel westbound on the northern portion of STH 29/Shawano Avenue until they reach another roundabout at the current location of Cardinal Drive/South Memorial Drive, or travel eastbound on STH 29/Shawano Avenue towards St. Mary's Hospital and Military Avenue. Those traveling from the south on USH 41 and wishing to travel eastbound on Shawano Avenue towards St. Mary's Hospital and Military Avenue will similarly exit and immediately enter a roundabout. At this point, these vehicles may travel eastbound towards Military Avenue on STH 29/Shawano Avenue, or travel westbound under USH 41 and on the northern portion of STH 29/Shawano Avenue described above. Vehicles traveling on STH 29/Shawano Avenue and wishing to travel through the intersection

with USH 41 and continue either eastbound or westbound will use this northern portion of STH 29/ Shawano Avenue and a series of roundabouts to do so. Those wishing to make a quick and direct connection to westbound STH 29/Shawano Avenue will be able to exit a ramp of USH 41 and make a direct connection onto westbound STH 29/Shawano Avenue. This connection does not include any roundabouts.

Enhanced connections between USH 41 and STH 29/Shawano Avenue will bring significantly higher daily traffic volumes, as evidenced by average daily traffic forecasts for the year 2035, onto STH 29/Shawano Avenue in an eastbound and westbound direction. Forecasted traffic volumes in both directions immediately to the west of the interchange on STH 29/Shawano Avenue total nearly 64,000 vehicles per day, whereas 2006 Wisconsin Department of Transportation data indicates 34,300 vehicles per day. Similarly, to the east of the interchange on STH 29/Shawano Avenue, forecasted traffic volumes in both directions total over 43,000 vehicles per day, whereas 2006 Wisconsin Department of Transportation data indicates 16,300 vehicles per day. These increases, in conjunction with the addition of roundabouts at all of these interchanges, will create a new set of traffic patterns and demand, affecting transportation to St. Mary's Hospital, Military Avenue, and other destinations in the area.

St. Mary's Hospital Expansion

St. Mary's Hospital, located on Shawano Avenue just west of Military Avenue has plans to expand medical facilities and create a medical corridor. St. Mary's Hospital recently completed a cancer

center addition in early 2010, and currently owns most of the land going west to Fellows Drive. Westward expansion plans include multiple phases. The City of Green Bay has created a planned unit development area as shown on Map 1.5 (Military Avenue Zoning).

Military Avenue Pavement Reconstruction

Scheduled for March through November of 2010, this reconstruction project will transform the aging arterial street into a modern, multi-modal environment with increased green space and improved infrastructure for pedestrians and bicyclists (see Figure 1.4). Motor vehicle lanes will be reduced from six to four in most locations, but turn lanes and bus turnouts will be provided where needed. The additional space will be used to add bicycle lanes and increase the width of the terrace. In addition to the new pavement, all above and below ground infrastructure will be replaced and updated. This approximately \$12 million reconstruction project is the first step in beginning to reshape the Military Avenue business district into a vital corridor that will better serve both the surrounding neighborhoods and the community beyond.

FIGURE 1.4: MILITARY AVENUE RECONSTRUCTION



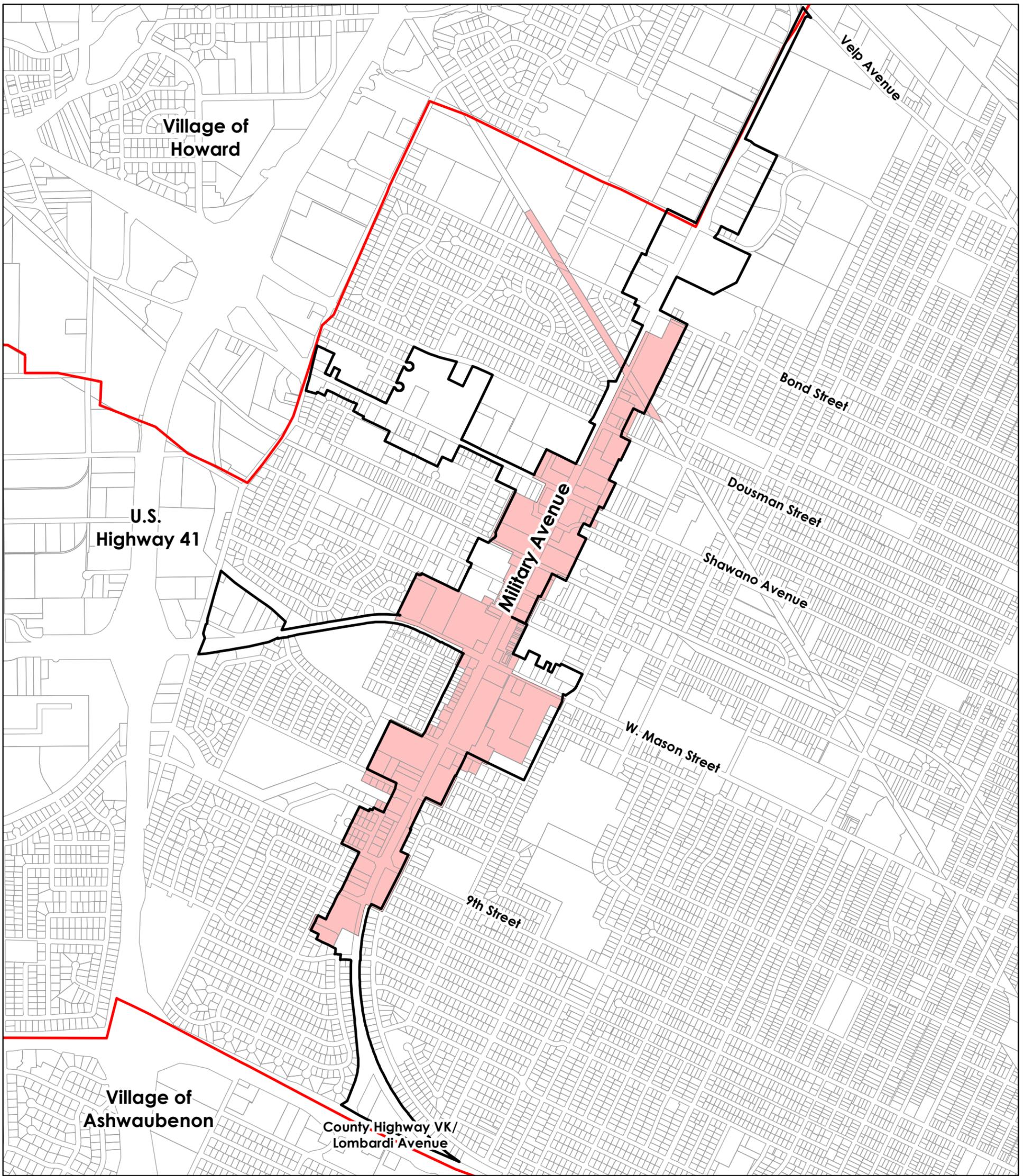
### Lambeau Field/Green Bay Packers Expansion Plans

The future plans of the Green Bay Packers will exert considerable influence on Military Avenue. During the planning process it was reported that the Packer organization had recently purchased multiple properties around Lambeau Field. City of Green Bay and Vierbicher staff discussed the organization's plans for the "Tiltetown Development District" with consultants to the Packers and Packers General Manager Mark Murphy at the 2010 Annual Shareholder's meeting.

Exact plans were not revealed, but it is clear that the Packers organization intends to be proactive in developing and managing properties around Lambeau Field to build upon investments in the stadium that the organization and community have made over the years. Property control allows the organization to influence surrounding development, prevent harmful or blighting uses, implement specific urban design standards, and limit competitors to the retail and restaurants inside Lambeau Field. The organization will also be able to build on the strong Packers brand and add more year-round activities and destinations to generate additional revenue for the organization. Projects could include hotels, restaurants, retail, exhibition space, and youth sports complexes. Funding sources, investment partners, and timelines for redevelopment have not been determined, but the Packers' brand strength and drawing power will drive development around Lambeau Field in the future.

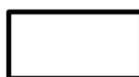
Direct competition from future development around Lambeau Field is not likely to be a major negative influence on Military Avenue. While some specific retail and restaurant businesses may compete with Military Avenue businesses, it is more likely that tenants of Lombardi Avenue redevelopment will be specialized retail, goods, and entertainment businesses that could only exist next to a major draw such as Lambeau Field. Military Avenue will remain better suited for general merchandise and daily living goods that serve the local population. Additionally, activities like sports camps or wellness retreats would draw people to the area for extended periods of time, which would have spillover benefits to Military Avenue.

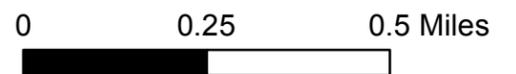
The area around Lambeau Field is likely to become a stronger regional draw, with more consistent year-round traffic levels in coming years. The area is likely to see property redevelopment, new businesses, more visitors, and more traffic around Lambeau Field. The Military Avenue Business District must take advantage of redevelopment around Lambeau Field by strengthening the physical link between Military Avenue and Lombardi Avenue. A bigger presence at Lombardi Avenue will help draw customers to Military Avenue businesses from any future Packers-related commercial redevelopment.



# Map 1.1: Tax Increment District 16 Boundary

January 2011

-  Military Avenue Study Area Boundary
-  Green Bay City Boundary
-  Tax Increment District 16



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## REGIONAL CONTEXT & LINKAGES

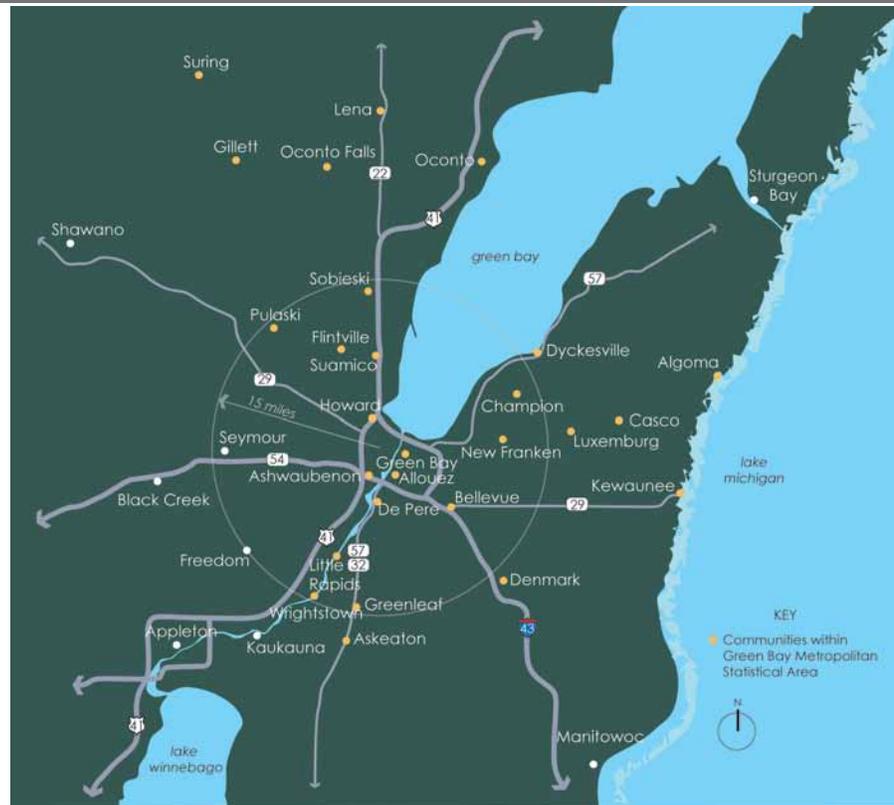
The Green Bay metropolitan area, located at the northern end of the Fox River Valley, is comprised of Brown, Kewaunee and Oconto Counties, has a population of approximately 300,000 residents, and represents the third largest metropolitan statistical area (MSA) in the state behind Milwaukee and Madison. For the purpose of this analysis, the primary population center of interest includes the City of Green Bay and seven surrounding communities: the Villages of Ashwaubenon, Howard, Allouez, Suamico, and Hobart the City of De Pere and the Village of Bellevue. These communities were grouped together because they represent a largely contiguous developed area surrounding Green Bay. In total, the population center contains approximately 191,000 residents, or 63 percent of the total metro area.

### Connectivity

The urban core of the Green Bay Metropolitan Statistical Area is served by one interstate highway, one US trunk highway and three state highways. Together these highways form a beltway that completely encircles the urban core.

- **Interstate Highway 43 (I-43):** I-43 is one of three interstate highway segments in Wisconsin. I-43 begins in Beloit, Wisconsin on the Illinois border and terminates in Green Bay. For the majority of its length I-43 runs north/south along Lake Michigan connecting Green Bay to Manitowoc (40 minutes), Sheboygan (one hour) and, ultimately, Milwaukee (one hour and 45 minutes). After entering the east side of the City of Green Bay, I-43 wraps around the City forming the northern portion of the beltway. At the northern end of the Military Avenue Corridor, I-43 carries approximately 35,000 vehicles per day (VPD, according to 2006 Wisconsin Department of Transportation Average Annual Daily Traffic figures); however, there is no access to I-43 from Military Avenue

MAP 1.2: REGIONAL CONTEXT



at this location. Vehicles per day is the primary measure of total traffic volume on any given street across both directions. Motorists wishing to access I-43 from Military Avenue must use either Atkinson Drive approximately 1.4 miles east of Military along Velp Avenue, or use US-41 to access the interstate at the point where they intersect in the northwestern part of the City.

- **US Highway 41 (US-41):** US-41 connects all of the Fox Valley cities and travels through Milwaukee before exiting the state. Downtown Appleton is located approximately 35 minutes south on US-41, with a primary shopping node clustered around the Fox River Mall about 35 minutes south of Green Bay via US-41. US-41 enters Green Bay on the west side of the City forming the western portion of the surrounding beltway. As US-41 crosses Highway 172, it carries approximately 72,000 vehicles per day (VPD), with approximately 37,000 VPD exiting onto Highway 172. At the next junction, Lombardi Avenue/CTH VK, US-41 carries 75,000 VPD with 14,000 exiting. Similarly, at the junction of US-41 and Mason Street (HWY 54), the US-41 volume is greater than 70,000 VPD with 19,000 people exiting onto Mason Street. When US-41 intersects Shawano Avenue/HWY 29, 41,600 VPD exit onto Shawano, and the traffic on US-41 falls to only 53,000 VPD. Clearly the Shawano exit is the primary destination for many travelers using US-41. Based on the traffic maps, it appears that more people exiting US-41 at Shawano Avenue travel west on HWY 29 toward the Village of Howard, and not east into the City of Green Bay.
- **State Trunk Highway 172 (STH 172):** STH 172 is a surface road as it enters Green Bay, and then becomes a freeway near the intersection with US-41. STH 172 serves as the main connection through the Villages of Ashwaubenon and Allouez and makes up the southern portion of the beltway; it carries between 64,000 and 84,000 VPD in its busiest sections. To the west of the City, STH 172 becomes US-54 connecting numerous small, rural communities. STH 172 ends where it connects with I-43 east of Green Bay.
- **State Trunk Highway 29/32 (STH 29/32):** STH 29/32 is a state trunk highway that serves as the primary east/west connection between Minneapolis/St. Paul, MN, Wausau and Green Bay. The Highway is a four lane freeway traveling from Elk Mound, Wisconsin (near Eau Claire) to Green Bay. Shawano lies 45 minutes

west of Green Bay along STH 29, and Wausau is approximately 1.5 hours west. When STH 29 enters Green Bay, it becomes Shawano Avenue, a key east/west Corridor through the City and a major intersection with Military Avenue. To the west of US-41, STH 29 carries approximately 34,300 vehicles per day, and east of US-41, within the City, the traffic falls to 15,000 VPD at the Military Avenue intersection.

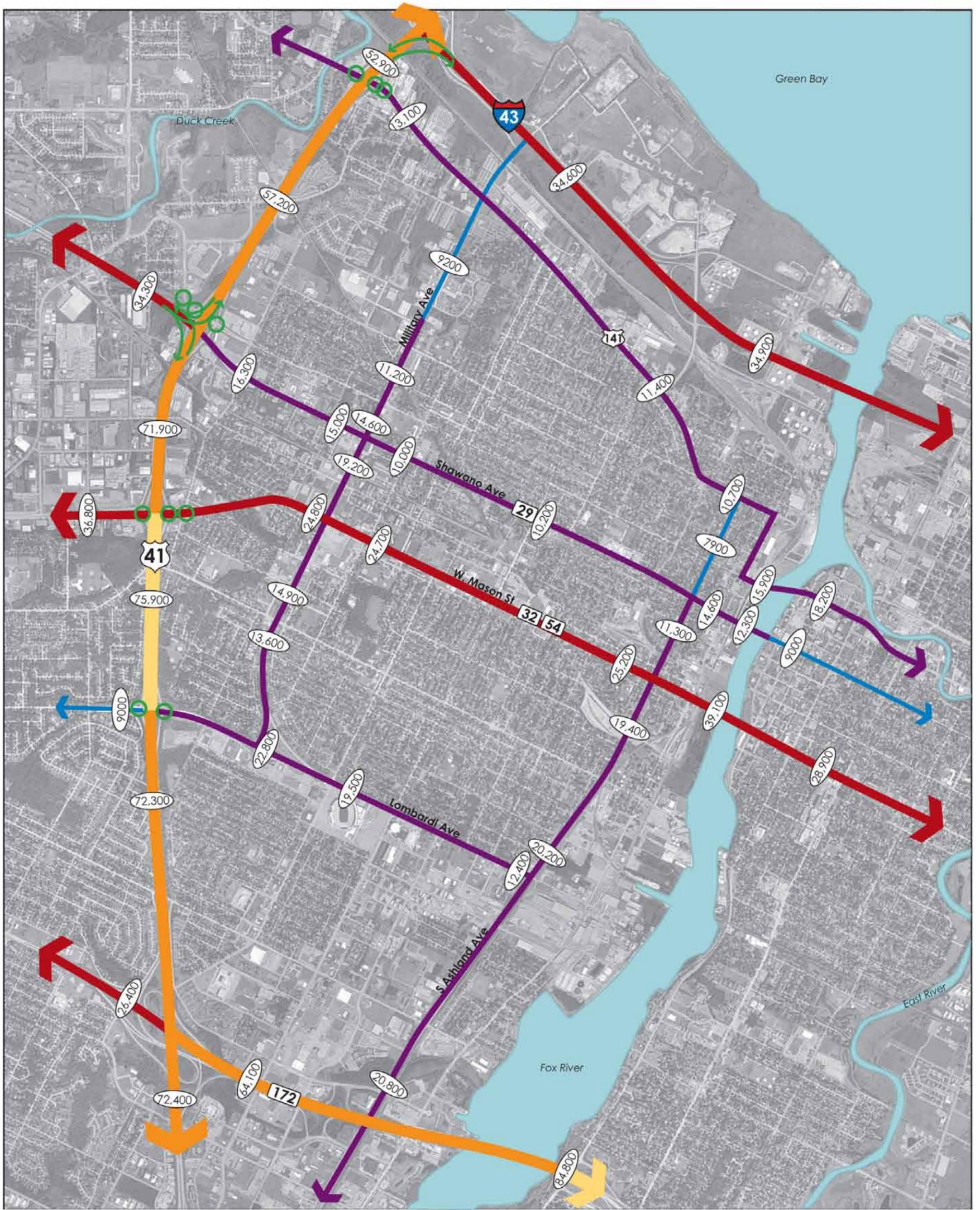
- **State Trunk Highway 57 (STH 57):** STH 57 travels from the northeast corner of Green Bay north to the Door County Peninsula. STH 57 connects Green Bay to Sturgeon Bay, which is located approximately one hour northeast of the City. As STH 57 exits Green Bay it carries 18,500 vehicles per day.

### **Regional Destinations**

The region surrounding Green Bay is home to numerous important destinations. Green Bay, because of its size and scale, is clearly a regional retail destination, but is not the only one in the area. Located about 35 minutes south of Green Bay, the City of Appleton contains a major retail destination built around the Fox River Mall. Despite the proximity of the two nodes, they have distinctly different trade areas, with Appleton's extending south to capture the Fox Valley cities of Neenah, Menasha, Oshkosh and the surrounding area. Green Bay serves areas primarily to the north and west. The Green Bay trade area and its surrounding competition will be discussed in more detail in the economic context section.

Other important retail destinations include Bay Park Square Mall and Oneida Street, the primary shopping center/mall in the immediate Green Bay area. It is located near the intersection of USH 41 and State Route 172 in the Village of Ashwaubenon, approximately one mile from the Military Avenue Corridor.

In terms of specialty retail, recreation, and tourism, Door County to the northeast is one of the most popular tourist destinations in the State of Wisconsin attracting more than two million visitors annually who frequent the numerous small towns, natural areas, beaches, shops, dining, and lodging locations on the peninsula. In addition, the region is home to the Green Bay Packers and Lambeau Field, a year-round attraction, which is located almost immediately adjacent to Military Avenue to the south. A



### Map 1.3: Regional Traffic Flow

- Vehicles per day:
- 75,000+
  - 50-75,000
  - 25-50,000
  - 10-25,000
  - <10,000
- Future Improvements:
- Roundabout
  - New Interchange

Traffic Counts from WI-DOT 2006 Data



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storied franchise and football stadium, the Green Bay Packers and Lambeau Field give the City of Green Bay and the region widespread recognition and provide a strong economic driver, especially during football season from September through December. Lambeau Field's presence near the southern end of the Military Avenue Corridor creates a node of activity. Military Avenue has great potential to draw some of this activity and business into the Corridor, and the Lambeau Field area certainly could serve as a gateway into the Military Avenue Corridor. These characteristics will be a point of focus when making recommendations for the future of the Corridor.

The two primary regional recreation areas are the Bay of Green Bay and the Fox River, which travels from Lake Winnebago northeast to its mouth in the Bay of Green Bay, just north of the City center. These areas offer opportunities for boating, wildlife viewing, hiking, and other recreational pursuits. In particular, to the northeast of downtown Green Bay is the Bay Beach Wildlife Sanctuary. Numerous park and recreation areas are located along the Fox River as it makes its way north.

Examples of other significant regional recreational areas outside the immediate vicinity include Door County, Wisconsin's "Northwoods," and Lake Winnebago. These locations serve as year-round destinations for boating, hunting, fishing, swimming, and other activities, contributing significant recreation expenditures to the area.

An important regional transportation destination is the Green Bay – Austin Straubel International Airport just west of the US-41 and STH 172 intersection in the Village of Ashwaubenon and southwest of the City of Green Bay. The airport consists of two runways with service to several larger destinations in the Midwest including Detroit, Minneapolis/St. Paul, Milwaukee, Cleveland, and Chicago that offer connecting flights to destinations throughout the United States and internationally. The airport contributes significant economic benefit to Green Bay and the northeast Wisconsin region in terms of employment and enhanced economic connectivity.

Other important regional destinations include educational institutions: The University of Wisconsin-Green Bay in the northeastern area of the city, Northeast Wisconsin Technical College in the northwestern portion of the city, and St. Norbert College in De Pere; as well as large employers such as the downtown Green Bay commercial district, St. Mary's Hospital, St. Vincent Hospital, Bellin Hospital, and the Aurora Baycare Medical Center. Additionally, the Oneida Indian Reservation consists of a large swath of land to the west of Military Avenue and the City of Green Bay. Although located a short distance from the commercial development along US Highway 41 and Military Avenue, this area is less developed and more rural than its neighbors to the east.

#### **Public Input on Transportation and Circulation**

The May 20 public meeting yielded important results about transportation options and issues in the Military Avenue Corridor. See Appendix Two for summary comments and map.



## URBAN FORM ANALYSIS

In order to organize the discussion about the physical context of the Military Avenue Corridor, Kevin Lynch's elements of city image and physical form are used. Lynch's book "The Image of The City" divides the elements into five categories: paths, edges, districts, nodes and landmarks. The combination of these elements creates an area's urban form, and, ultimately, the strength of its sense of place. The following pages and Map 1.4 contain an inventory and assessment of these elements within the planning area.

### Paths

*Paths are the channels along which people move. From here people observe other elements in the environment.* Examples include streets, walkways, transit lines, and railroads. Paths can be simple and one-dimensional like a bike path; or they may take on a room-like quality in the case of a well-formed urban Corridor.

### Streets

In the Military Avenue planning area, the major paths are associated with the street network. The planning area circulation pattern is based on a conventional urban grid, and many of the streets have a standard cross-section including travel lanes in each direction, a terrace, and a sidewalk on either side. There are currently no dedicated recreational trails in the planning area, although the redevelopment of Military Avenue during summer 2010 included dedicated on-road bicycle accommodations in both directions, making bicycle travel safer and more appealing.

The focus of this study is Military Avenue, a north/south corridor running from Lombardi Avenue to Velp Avenue. Traffic volume is heavy along Military Avenue, and is a key underlying element that creates the characteristics and dynamics of the Corridor that are evident today. Due to its pervasive role in shaping the conditions and perceptions of the Corridor, overall transportation and connectivity along the Corridor play a pivotal role in shaping the market analysis and design planning process. Transportation conditions and connectivity shape the means by which people access retail and other services along the Corridor, as well as the experience of those making these trips, with important economic and social implications. The reconstruction of the cross-section of Military Avenue establishes a more sustainable framework for the vitality of this Corridor in the future.

According to WI DOT 2006 traffic count data, Military Avenue is the busiest local north/south street in the City, with 9,000 vehicles per day on the north end to over 19,000 vehicles per day in the center commercial area between Shawano Avenue and West Mason Street. The major defining feature of this path, prior to reconstruction, was its width, as it had three travel lanes in each direction, in addition to turn lanes at intersections and a concrete median down the center. The perception of width is further enhanced by the placement of the buildings, which are set back to allow for parking in front. The Corridor does have continuous sidewalks along both sides through the commercial areas, although there is no direct sidewalk connection to the Lambeau Field area. Prior to reconstruction the scale of development along the Corridor was certainly not pedestrian in nature, making pedestrian travel inconvenient with the travel lanes, intersections, and signaling focused on automobile travel. There were a large number of curb cuts and few pedestrian amenities such as benches, bus shelters, planters, or specialized cross-walks. The redevelopment of the street was set to be completed in 2010, and included many pedestrian-friendly amenities such as dedicated bicycle lanes, improved pedestrian crosswalks, a reduction in the total number of vehicle travel lanes, a narrower pavement cross-section and landscaped terraces. These improvements will help move the Corridor towards being a more walkable and pedestrian-oriented commercial Corridor.

The most heavily traveled path in the area is USH 41, which runs parallel to Military Avenue and has traffic volumes nearing 75,000 vehicles per day. USH 41 has two travel lanes in each direction and limited access points. Two interchanges bring traffic from USH 41 through the planning area (Mason Street and Shawano Avenue), and a third interchange (Lombardi Avenue) creates the southern boundary of the planning area and connects USH 41 to Lambeau Field.

The next most heavily traveled path is Mason Street/STH 32/54, which is an east/west connection from USH 41 to downtown Green Bay, and one of two interchanges that pass through the planning area. Mason Street has two travel lanes in each direction, and turn lanes at intersections and driveway openings. This street is the busiest east/west street in the planning area, with a volume of nearly 25,000 vehicles per day. Development along Mason Street consists of box-type commercial development near USH 41, and smaller scale commercial development near the intersection with Military Avenue and areas to the east.

Shawano Avenue is the second interchange with USH 41, although it carries less traffic on average than Mason Street (10,000-16,000 vehicles per day). Shawano Avenue has two travel lanes in each direction, but has fewer turn lanes and, thus, a narrower pavement width than Mason Street or Military Avenue. Destinations along Shawano Avenue include retail development near US-41, Saint Mary's Hospital west of Military Avenue, and West High School located east of Military Avenue.

#### **Bus & Bicycle Routes**

There are four Green Bay Metro bus routes that service portions of the Military Avenue Corridor, along with three limited service bus routes. Bus routes identified as Mather (3), Shawano (4), West Mason/NWTC (6), and Ninth (9) intersect and travel along portions of the Corridor, connecting Military Avenue with areas to the east and west, including downtown Green Bay.

According to Brown County, the Military Avenue Corridor is not currently identified as a "preferred bicycle route," but there are several preferred routes that intersect Military Avenue traveling east and west, including Ninth Street, Western Avenue, and Bond Street, which provide connections to an on-street bicycle lane and a multi-use path system to the east. The Mountain-Bay multi-use trail connects Howard Memorial Park to the northwest of the corridor with Wausau, and another trail runs from downtown Green Bay south along the eastern bank of the Fox River, becoming the Fox River Trail.

#### **Edges**

*Edges are linear elements seen as boundaries between two faces.* Some edges are barriers which close one area off from another and are therefore hard to penetrate. Real or perceived, these edges contain certain characteristics that will begin to shape and define future redevelopment within the area.

Edges are often the boundaries between two neighborhoods or linear breaks in continuity. They include such things as shorelines, railroad cuts, edges of development walls, and building faces. Edges, for many people, are important organizing elements and play a role in defining and holding together generalized areas.

In the Military Avenue planning area, USH 41 forms an edge due to its limited crossing points and high traffic volumes. The scale of development along USH 41 is generally much larger (larger buildings and parking lots, taller signs), creating the sense that one is entering a different area.

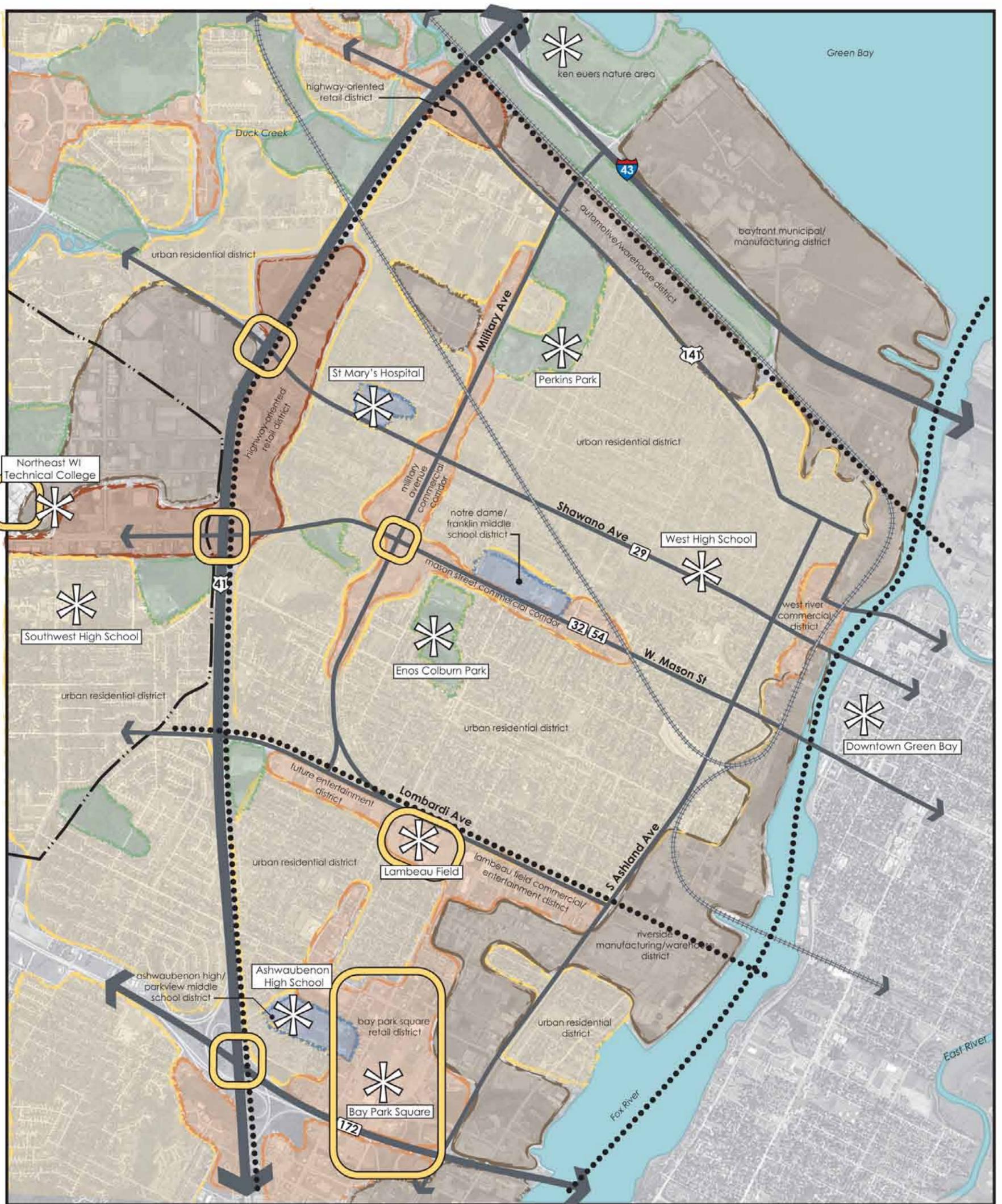
Lombardi Avenue forms an edge along the southern side of the planning area. It marks the transition from an urban residential area to the Lambeau Field entertainment area and Bay Park Square retail district. Military Avenue also terminates at Lombardi Avenue, further enhancing the perception of Lombardi Avenue as an edge.

The Fox River forms an edge along the eastern side of the planning area, separating the east and west sides of the city. Numerous crossing opportunities prevent the river from becoming a barrier.

The rail line and I-43 form an edge along the northern side of the planning area, due to limited crossings and few destinations on the northern side. The railroad is owned by Wisconsin Central Ltd., a subsidiary of the Canadian National Railway out of Montreal, Quebec, which operates in Wisconsin and Michigan's Upper Peninsula.

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**Map 1.4: Urban Form Analysis**

- |  |                    |  |                         |
|--|--------------------|--|-------------------------|
|  | Path               |  | Residential             |
|  | Edge               |  | Commercial/Office       |
|  | Node               |  | Large Scale Retail      |
|  | Landmark           |  | Manufacturing/Warehouse |
|  | Oneida Reservation |  | Park/Open Space         |
|  |                    |  | Civic/Medical           |



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## Districts

*Districts are medium to large sections of the city which a user enters. The districts are recognizable from their common identifying character. Examples of this character include land use and density.*

The focus of this planning effort is the Military Avenue commercial district, which forms the spine of the planning area along Military Avenue and branches out along Mason Street. Currently this district is characterized by single-story small scale and strip retail development. Most buildings retain their original character, although there are pockets of newer development. Buildings are generally set back from the street to allow for parking in front, and most establishments have their own parking lots.

Landscaping is typically minimal in commercial areas, often consisting only of mowed turf grass in the terrace area. Portions of the existing terrace also include street trees. Above-ground utilities are common and, combined with the abundance of signage, they lend a cluttered appearance to the streetscape.

Because of its location in the midst of a large urban residential area, this district has the potential to provide daily convenience items to the local residents in addition to specialty retail items to commuters or tourists. Improved pedestrian connections from the Corridor into the surrounding neighborhoods could encourage local pedestrian traffic. Concentrating nodes of specific types of development around busy intersections may help create destinations within the planning area, allowing consumers to park once and walk to various shops in the same area.

Surrounding the commercial “spine” is an established urban residential district made up of fairly dense single family neighborhoods on a conventional street grid. There are a number of multi-family residential areas as well, although they tend to be clustered together rather than intermixed with single-family areas. Park space is abundant throughout the neighborhoods, as Perkins, Murphy, and Chappell parks sit north of Mason Street and Firemans, Colburn, and John Muir parks sit south of Mason Street.

Stretching along US-41, Shawano Avenue, and Mason Street is a highway-oriented retail district with large scale retail development such as Home Depot, auto service, building supply, RV sales, Fleet Farm, Wal-Mart, and Woodman’s. This district serves as a buffer between the residential district and the highway, as well as an attraction for traffic from the highway into the

planning area.

South of Lombardi Avenue are the Lambeau Field and Bay Park Square districts, drawing large crowds to the Oneida Street area on game days during the football season and on weekends. This area is characterized by mall and big box retail, restaurants and hotels. This is an auto-oriented district with heavy traffic and a lack of any significant pedestrian or bicycle accommodation. A small pocket of residential development is encircled by the commercial area, and includes Ashwaubenon High School. Much of this district, with the exception of Lambeau Field, is located in the Village of Ashwaubenon.

## Nodes

*Nodes are strategic points with intensive use often located at junctions or connections. Examples may include a break in transportation, a crossing or convergence of paths, or moments of shift from one structure to another. Nodes may also be a concentration of one particular use or physical character.*

Examples of nodes at convergences of paths in the planning area include the intersections of US-41 with STH 172, Mason Street, and Shawano Avenue. The intersection of Mason Street and Military Avenue is an important node to consider during redevelopment of the area, as it is the busiest intersection on Military Avenue and the route that motorists would likely use to reach a destination along Military Avenue from US-41.

Nodes as concentrations of a particular use are located at Lambeau Field and Bay Park Square. An improved connection between the Lambeau Field node and the Military Avenue/Mason Street node could draw some of the traffic from



Packers' game days into the planning area.

### **Landmarks**

*Landmarks are external physical objects that can be used as a point of reference. Some landmarks are high and can be seen from a far distance. These are often used as radial references. Other landmarks are lower and more local, and can only be seen from certain approaches. These contribute to the identity of an area.* Landmarks are frequently used for wayfinding, and seem to be increasingly relied upon as a journey becomes more and more familiar. A single, identifying characteristic of a landmark is one that is unique or stands out from others. Buildings, public art, memorials, and public spaces are all examples of landmarks. They may have, but in this context may not possess, some level of historical significance.

Although there are no landmarks that can be seen from a great distance, the most notable built landmark near the planning area is Lambeau Field near the southern end of Military Avenue. The most notable natural landmarks include the Bay of Green Bay and the Ken Evers Nature Area. Although they are not visible at a distance, these are unique features. The Ken Evers Nature provides a direct connection from the north end of Military Avenue to the Bay of Green Bay, the city's namesake landmark. Other wayfinding landmarks include the Fox River, Southwest and West High Schools, Colburn and Perkins Parks, Northeast Wisconsin Technical College, and St. Mary's Hospital. On a smaller scale, commercial signage also often acts as a landmark, giving motorists and pedestrians a visual cue to locate the entrance or driveway of a building.

## ZONING & LAND USE

In the process of redevelopment and revitalization, the spatial arrangement and concentration of existing land uses impacts the potential of neighboring parcels, can limit future uses, and reveals target redevelopment locations. Important elements of land use include existing zoning, the presence and future mitigation of land use conflicts, and planned long-term land use evolution.

### Zoning

The Military Avenue Corridor and Planning Area contains eight zoning classifications, shown on Map 1.5.

The majority of residential uses are zoned **R1 – Low Density Residential**. R1 is used for neighborhoods of primarily single-family dwellings with lots of at least 7,500 square feet. Two-family developments are also permitted in limited numbers. The R1 zoning covers virtually all of the residential areas west of the River, with the exception of some R3 – Varied Density Residential along Mason Street and abutting the commercial property along Military Avenue.

**R3 – Varied Density Residential** zoning exists in areas intended to support moderate- to high-density attached and multi-family housing. In the study area, the R3 zoning is generally immediately adjacent to the commercial property along Military Avenue. This configuration suggests that the attached and multi-family housing is a buffer between the single-family neighborhood and the commercial development. The abundance of multi-family residential is centered adjacent to the commercial property along Military Avenue between West Mason Street and Shawano Avenue. In particular, there is a strip of clustered multi-family residential structures along Western Avenue east and west of Military Avenue.

Approximately two-thirds of the property along Military Avenue is zoned **C1-General Commercial**. The C1 commercial zoning is used along the City's primary commercial Corridors and is intended to include "moderate-intensity" retail, office and service uses, some of which may include certain unattractive visual elements such as outdoor displays, outdoor storage, and excessive signage, among others.

In a few key areas along Military Avenue, commercial parcels are zoned **C3-Community Center Commercial**. The C3 zoning is reserved for "major commercial districts" that generate significant traffic and serve a large segment

of the population. Along Military Avenue, the parcels zoned C3 include Green Bay Plaza and its adjacent Sears department store, the Shopko store and surrounding businesses at Military and Shawano, and Perkins Park Square at the southeast corner of Military Avenue and Bond Street. The vast majority of the Military Avenue Corridor Planning Area has either C1 or C3 zoning, while areas surrounding the Corridor largely consist of single family residential, some multi-family residential, and public property and park areas.

In addition to the residential and commercial properties, there is a limited amount of **OR – Office Residential** zoned property. This zoning district is a "transitional mixed-use district intended for edges of downtown or segments of commercial Corridors where there is some development pressure to convert residential uses to offices." However, it appears that all of the OR zoned properties in the study area have already been converted to office uses.

Between Mason Street and Shawano Avenue, behind the commercial properties on the west side of the street are two parcels zoned **LI – Light Industrial**. The light industrial zoning is intended to include warehousing, shipping, wholesaling, limited manufacturing and a range of commercial uses. These parcels contain warehouses for H.J. Martin and Son, Inc., a flooring manufacturer and retailer in the district.

Near the north end of the Military Avenue Corridor is a small cluster of parcels zoned **BP-Business Park**. As its name implies, it is reserved for traditional business park uses and is designed like most modern, low-density business parks, and is occupied by several businesses including Hetzel Enterprises, Inc. and Juza Investments, LLC. These parcels are out of the Military Avenue study area boundary, however.

To the west of Military Avenue between Shawano Avenue and Dousman Street, a **PUD-Planned Unit Development** area exists, representing the medical corridor established to accommodate the expansion plans of St. Mary's Hospital.



**Land Use Compatibility and Conflicts**

Military Avenue is almost exclusively lined with commercial properties with the exception of the first quarter mile north of Lombardi Avenue. Immediately behind the commercial properties is a mix of housing units and service-focused office. Land use compatibility considers the types of uses which exist in close proximity to one another, be it commercial, industrial, residential, or others. (A large collection of compatible retail land uses creates an environment conducive to retail shopping where businesses are able to benefit from customer traffic. Incompatible land uses detract from convenience and negatively impact the shopping experience and Corridor retail atmosphere).

Although land uses immediately along Military Avenue are largely compatible with each other, the existence of commercial land uses abutting residential properties on the periphery creates the potential for conflict. Specifically, automobile-oriented commercial land uses, like those found along Military Avenue, influence the transportation and circulation for residents of adjacent neighborhoods, limiting or hindering access to area destinations and providing unfriendly aesthetics when large commercial buildings face residential properties. Some parts of the study area contain land uses that provide a buffer between these residential land uses and the commercial development along the immediate Corridor. Some parts of the Corridor, though, such as Irvington Street between West Mason Street and 6<sup>th</sup> Street, as well as Saint Agnes Drive, between 9<sup>th</sup> Street and 7<sup>th</sup> Street contain residential areas that abut directly against the Corridor without a buffer. Any further developmental modifications of the Corridor will continue to have an effect on area residents in terms of their living conditions and travel behavior.

The fencing along the residential properties south of Langlade Avenue is a specific area of potential land use conflict identified by the planning process. The inconsistency of fence design and materials detracts from the south end of Military Avenue, which should be enhanced to serve as a significant gateway to the corridor.

**Future Evolution of Land Use**

When comparing existing land use and zoning to the future land use plan found in the City Smart Growth Plan, the only parcels that see a change in future land use are the two light industrial parcels mentioned as areas of current land

use conflict. In the future land use plan, each of those parcels is targeted for commercial use, which is more appropriate given their position in the Corridor.

**Public Input on Land Use**

The following outlines the results from the Land Use and Redevelopment station that was part of the May 20 public meeting. This station combined a survey and several mapping exercises. The survey sought feedback on what types of land uses people wanted to see if there is redevelopment in the Corridor, what types of land uses are too prevalent and what types of uses they would like to see more of along the Corridor. The top three types of land uses respondents wanted to see more of were retail/commercial, public space/parks, and institutional (such as schools, medical services, government, etc.).

Table 1.1 summarizes responses to the question of whether there is too much of specific land uses along the Corridor.

People generally felt that the limited amount of industrial and single-family residential is appropriate for the Corridor. Most people found that all the other land uses should be increased. With no majority saying that there is too much of a specific land use, the results could be interpreted as a call for increasing density, or as a hope that empty buildings will be filled with new businesses. The planning process must further explore these concepts. People also want to see more public spaces along the Corridor. Additional retail/commercial businesses were a popular choice, with people commenting that a grocery store, clothing stores, shoe stores and more national chains and upscale stores would benefit the area. Many of the people who felt there is too little multifamily housing suggested additional senior housing.

TABLE 1.1: GENERAL LAND USE

Category	Too Little	Just Right	Too Much
Industrial	3	13	1
Retail/Commercial	16	3	1
Single-Family Residential	2	12	4
Multifamily Residential	9	3	5
Institutional	9	6	1
Public Space/Parks	12	8	0

The station also asked people to rank three aesthetic improvements they would like to see. Five choices were given, and a ranking of 1 (most desired) to 3 was requested (responses that included more than one of the same number were not counted in this summary). Highest priority items were building façade improvements and improved building design. Lowest priority items were signage enhancements and parking area improvements. Improved landscaping ranked in the middle.

Ten specific building design elements were listed, and people were asked to rank each element by order of importance to gather more details on what they would like to see in future development along the Corridor. Lower numbers were the more important elements. Averages were derived from the rankings, and each element is shown below:

1. Pedestrian orientation (3.24)
2. Building setback/parking design (3.75)
3. Landscaping (3.94)
4. Building façade (4.60)
5. Building mass and height (5.00)
6. Appropriate signage (5.88)
7. Parking lot design (5.94)
8. Building materials (6.18)
9. Building density (6.47)
10. Window size/shape/number (8.13)

Comments were given with the above rankings:

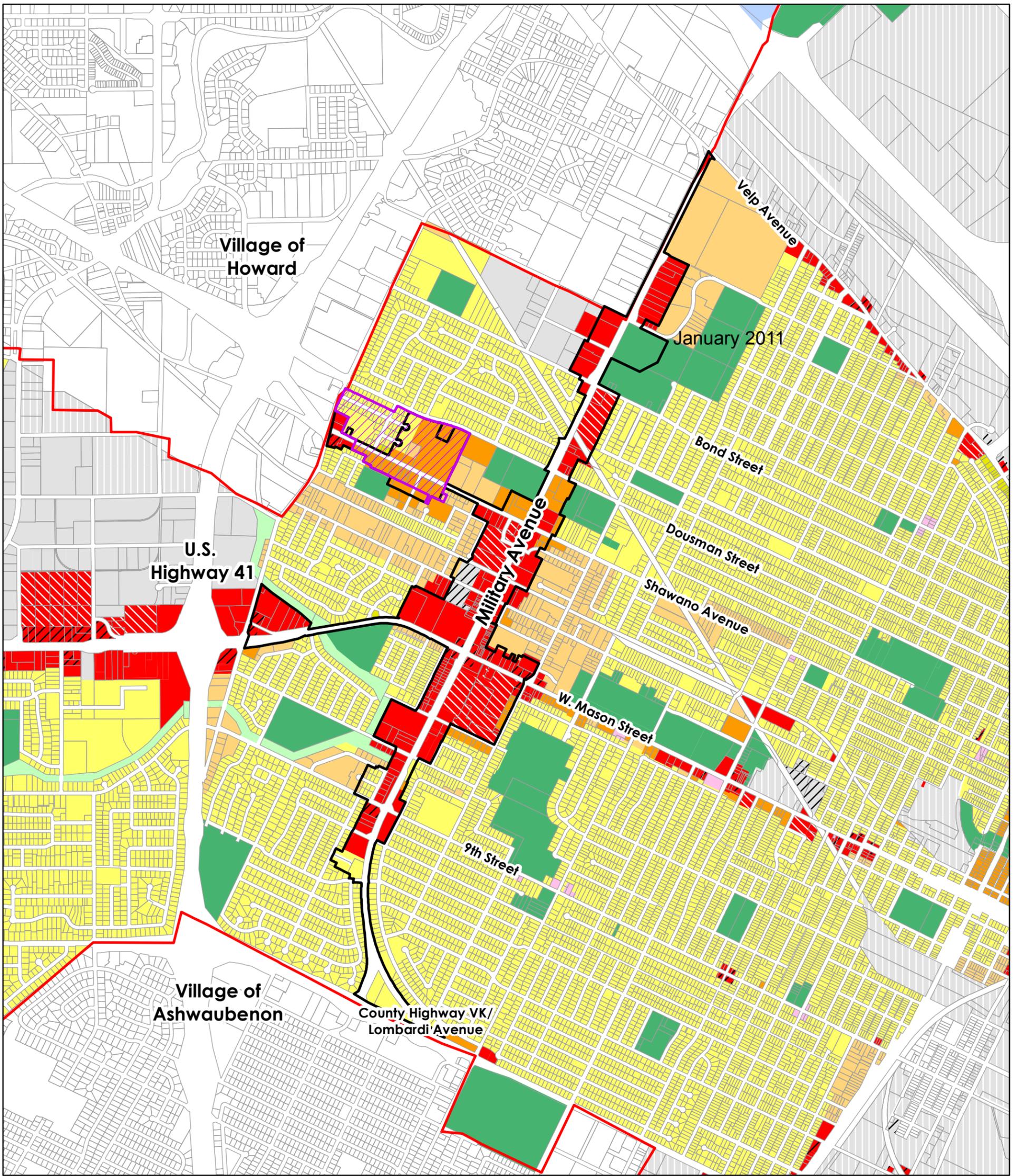
- We need to make Military Avenue more welcoming, less cluttered, and more appealing to potential customers.
- More landscaping; less asphalt.
- Better night lighting.
- It looks bad to have single-family homes converted to businesses.
- The area is a sad sight to see – there is no cohesive design; the poor design scares people away from the Corridor.
- Military Avenue needs sidewalks from end to end. The area needs a farmer's market.
- Parking is needed in front of stores for safety and openness.

Related to the last comment above, people preferred parking in front of buildings by a margin of 3 to 1, contradicting the stated desire for increased pedestrian and bicycle friendliness, and also contradicting the results of the pedestrian improvements survey. That question asked people to rank pedestrian improvements; increased pedestrian orientation of buildings was the #1 priority, followed by enhanced sidewalks and improved bus shelters/landscaping/benches. The apparent contradiction indicates a need for further dialogue on this topic and exploration of visual depictions of alternative design scenarios.

There were several mapping exercises that were conducted as part of the land use and redevelopment station. Results of the mapping exercises are summarized in three maps, which can be found in Appendix Two: multifamily redevelopment potential, public space and civic opportunities, and higher density redevelopment potential.

Finally, the land use and redevelopment station concluded with people writing their vision for the Corridor. Those comments are provided in Appendix Two to this document.

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# Map 1.5: Military Avenue Zoning

January 2011

-  St. Mary's PUD Boundary
-  Military Avenue Study Area Boundary
-  Green Bay City Boundary

## Zoning

-  RR - Rural Residential
-  R1 - Low Density Residential-New Lots
-  R2 - Medium Density Residential
-  R3 - Varied Density Residential
-  OR - Office Residential
-  NC - Neighborhood Commercial
-  C1 - General Commercial

-  C2 - Highway Commercial
-  C3 - Community Center Commercial
-  GI - General Industry
-  LI - Light Industry
-  BP - Business Park
-  PI - Public Property / Institutional
-  CON - Conservancy

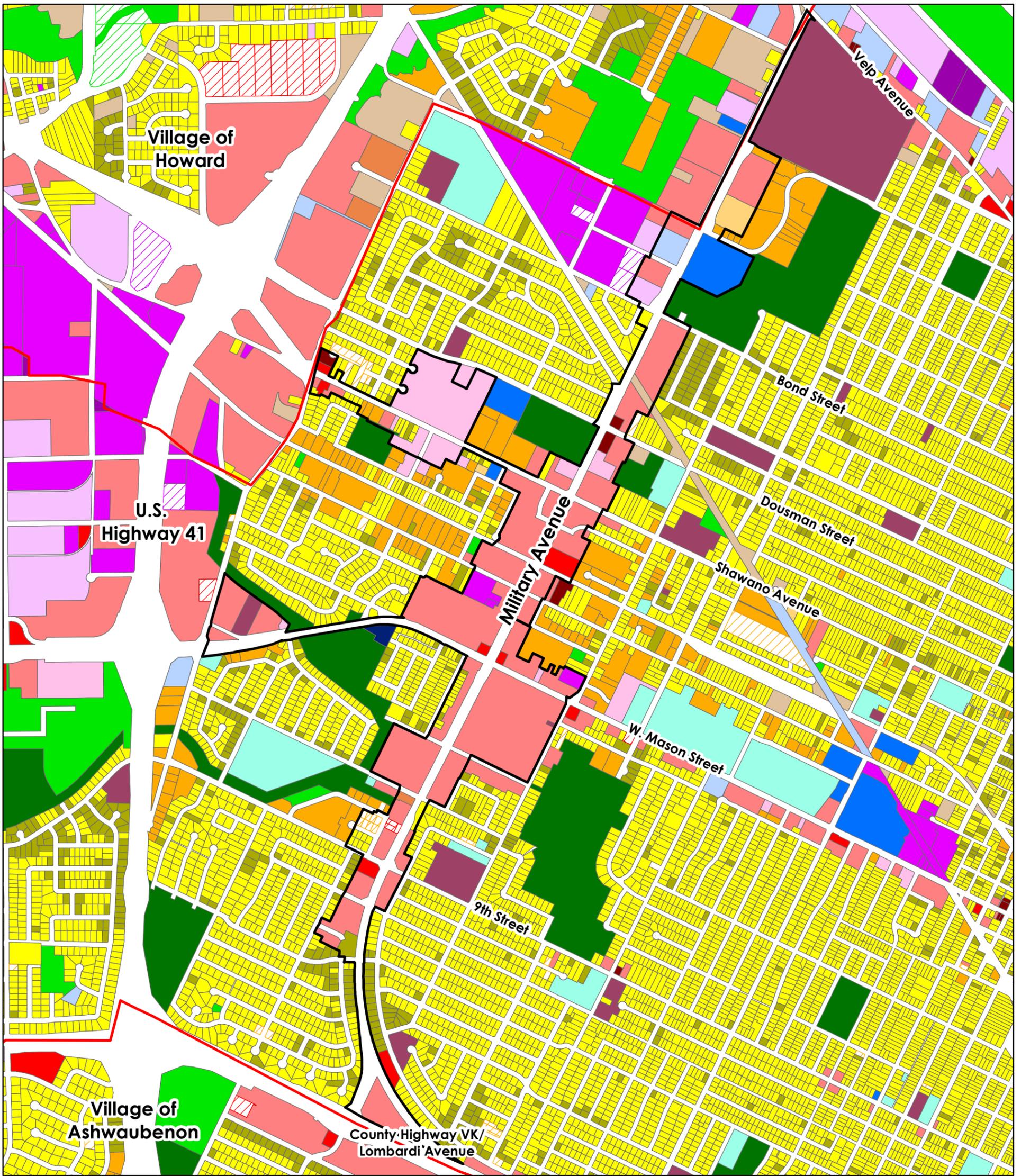


0 0.25 0.5 Miles

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# Map 1.6: Military Avenue Land Use

January 2011

- |  |  |   |
|--|--|---|
| <ul style="list-style-type: none"> <li> Military Avenue Study Area Boundary</li> <li> Green Bay City Boundary</li> </ul> | <p><b>Current Land Use</b></p> <ul style="list-style-type: none"> <li> Single Family Residential</li> <li> Two Family Residential</li> <li> Multi-Family Residential</li> <li> Other Residential</li> <li> Land Under Residential Development</li> <li> Vacant Residential</li> <li> Retail Sales, Services, and Shopping Centers</li> <li> Other Commercial</li> <li> Land Under Commercial Development</li> <li> Vacant Commercial</li> <li> Manufacturing</li> <li> Other Industrial</li> </ul> | <ul style="list-style-type: none"> <li> Land Under Industrial Development</li> <li> Vacant Industrial</li> <li> Communication/Utilities Facilities</li> <li> Administrative Buildings, Post Offices, Municipal Garages</li> <li> Police and Fire Stations, Other Safety Facilities</li> <li> Schools, Universities, Libraries, Other Educational Facilities</li> <li> Health Care Facilities</li> <li> Sports Facilities, Fairgrounds, Other Assembly Facilities</li> <li> Religious Facilities</li> <li> Active Outdoor Recreation Areas</li> <li> Agriculture Areas</li> <li> Water, Woodlands, and Other Natural Areas</li> <li> Natural Areas - Land Under Development</li> </ul> |
|--|--|---|



0 0.25 0.5 Miles

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Data Source: City of Green Bay and Brown County

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## BUSINESS & UTILIZATION

### Corridor Tenants & Business Mix

The Military Avenue corridor draws customers from Green Bay and the surrounding region with its varied retail opportunities and accessibility. Tables 2.1 and 2.2 found in Chapter 2 (Market Assessment) display the composition of businesses in the Military Avenue corridor based on category.

The economic vitality and value of an area can, in part, be judged by the extent to which land is productively utilized. Two measures for economic utilization are the land value to improvement value ratio and improvement value per acre. It is important to note that commercial tenants exist in both individual buildings along the street, as well as in larger multi-unit strip mall structures.

### Improvement Value to Land Value

This relationship measures the total value of improvements against the value of land. If the ratio is 1.0, the improvements and land are of equal value. Ratios of more than 1.0 indicate that improvements have a higher value than the land and the land itself is being used in an economically effective manner. On the contrary, assuming that land value is, in part, determined by the potential income stream generated if the property is used to its fullest extent, the higher the value of the land, the greater intensity of use it should be able to sustain. Therefore, a ratio of less than 1.0, indicating that the land is worth more than the improvements made on it, means that the land is not being used to its economic potential.

Map 1.7 displays improvement value to land value ratios for commercial properties along the Military Avenue corridor. It is evident that the majority of the commercial parcels along Military Avenue within the study area have ratio values of less than 2.0, with a significant number of parcels having values of less than 1.0, both of which indicate underutilization of land within the corridor. There is a cluster of parcels with ratios between 2.0 and 3.0 along Military Avenue between Mason Street and Shawano Avenue, particularly on the west side of the street. Although these ratios are higher indicating better use of parcels, the values are still low relative to similar thriving commercial areas in the state, and the adjacent commercial area to the west of Military Avenue at the junction of STH 29 and US-41. There are a handful of commercial parcels with ratios between 3.0 and 5.0, and only one commercial parcel along the corridor, containing the Green Bay Plaza Shopping Center, with a ratio of 5.0 or greater.

### Improvement Value per Acre

This variable is determined by dividing total improvement value on each parcel by the total parcel area. The result is a measure of the intensity of use on a particular piece of land. It is natural for improvement value per acre to differ depending on parcel size. It is important to note that the presence and location of lower improvement value per acre ratios along the corridor is largely consistent with the presence and location of parcels with lower improvement value to land value ratios. Generally the same parcels have low ratios in each of these two areas.

### Public Input on Market and Business Environment

The Market and Business Environment station at the May 20 public meeting asked a series of questions regarding people's shopping and commuting habits. About 75% of respondents visit the corridor more than five times per month for shopping or services, and most of those trips occur during the weekday. All but two of the 22 people answering surveys said that it takes them less than 15 minutes to travel to the corridor from their house. Once people get to the corridor most of them are there for shopping or services, with lesser amounts commuting through or working in the corridor. Given the number of survey respondents who live close to (or in) the corridor and the number of trips they take per month to visit corridor businesses, it is not surprising that most people do their weekly errands close to their home.

However, in spite of the number of times per month that most people visit Military Avenue businesses, most (over three-quarters) go to Bay Park Square Mall for their specialty shopping needs. Responses were evenly split between Military Avenue and Bay Park for most-frequented retail area, suggesting that more people travel to Military Avenue for necessities, as opposed to specialty goods.



Feedback on the corridor's strengths and weaknesses were varied. Strengths that were listed included:

- Central location;
- Variety of stores (cited several times);
- Convenience/accessibility/highway access;
- Several specific stores/businesses (Shopko, Walgreens, CVS, family restaurants, Bay Motel, Sears, Ray's Tire).

Ironically, the heavy use of the road and lower traffic were both cited as strengths. One survey said that the area's potential was a strength.

Weaknesses listed included:

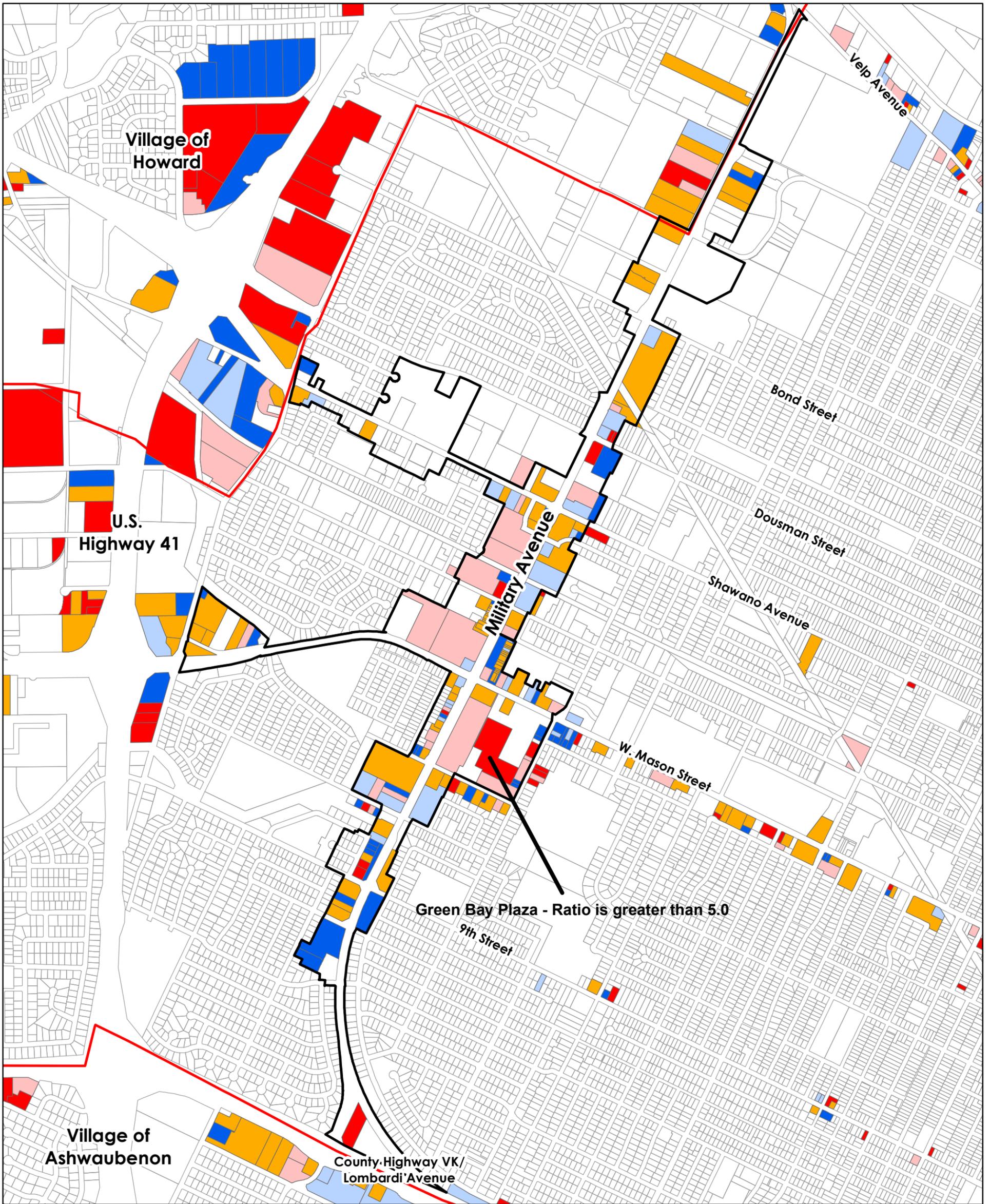
- No grocery store (cited many times);
- Limited parking;
- Too many check cashing businesses (cited many times);
- Difficult access (contrary to some who cited easy accessibility as a strength);
- Lack of a connection to I-43 on the north end;
- Too many dollar stores;
- The district has an aged look and has "old businesses;"
- Not enough restaurants (contrary to the listing of family restaurants as a strength);
- Not enough destination stores/lack of national icons/businesses (cited several times).

Workshop attendees were also asked what businesses/types of businesses they most often patronize in the Military Avenue area, and what types of businesses they would most like to see added to the mix. The following are businesses that were mentioned by more than one person as popular destinations:

- Office Depot (4);
- Walgreens/CVS/drug store (4);
- Shopko (3);
- Sears (2);
- Gas station/BP station (2);
- Naniots (2).

The three places that drew the most visits by particular *individuals* each month were Bay Family Restaurant (25 times/month), Harmony House Assisted Living (20 times/month), and Oneida Street (10-15 times/month).

The most desired retail for the area is a grocery store (requested by 8 people), followed by restaurants (5) and clothing stores (2). A few people simply requested "specialty shops or "quality stores," and one person said "whatever is possible to fill in the empty areas."

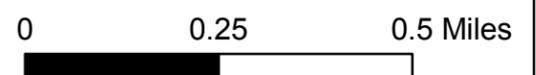


**Map 1.7: Improvement Value to Land Value Ratio**

January 2011

**Legend**

-  Military Avenue Study Area Boundary
  -  Green Bay City Boundary
- Improvement Value to Land Value Ratio**
-  Less than 0.5
  -  0.5 - 1.0
  -  1.0 - 2.0
  -  2.0 - 3.0
  -  Greater than 3.0

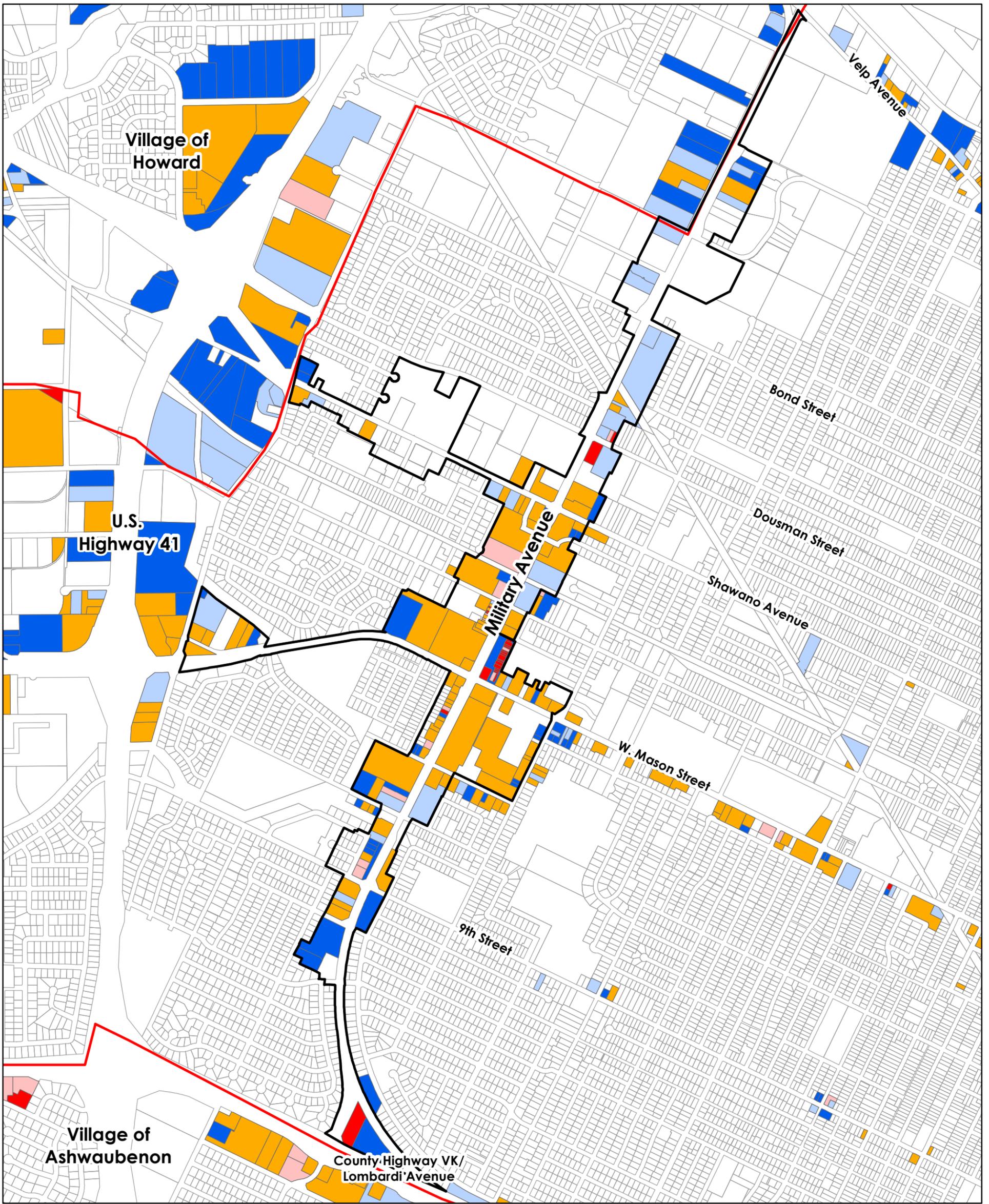


Data Source: City of Green Bay and Brown County

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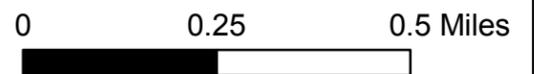
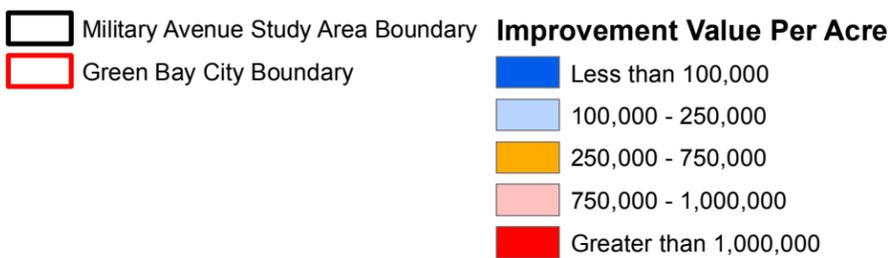
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## Map 1.8: Improvement Value Per Acre

January 2011

### Legend



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## SUMMARY & KEY OBSERVATIONS

An assessment of the physical context of the Military Avenue corridor and surrounding area helps to define their strengths and weaknesses. These strengths and weaknesses provide a critical analysis and summary of the corridor that will help inform its role in the future economic fabric of the community. Indeed, strengths of the corridor need to be promoted while weaknesses indicate areas where improvement is needed. The strengths and weaknesses and key observations below are drawn from the physical context assessment and public input gained from the businesses surveys, stakeholder interviews, and May 20, 2010 public meeting results, particularly those pertaining to quality of life.

### Strengths

- Over 40,000 vehicles per day exit US-41 at Shawano Avenue
- Center of many recreational and entertainment destinations
- Center of well-established and multi-modal transportation network – connected to all parts of the City and throughout the area
- Busiest north/south street in the City of Green Bay – high profile and well-traveled area
- Mason Street is one of the busiest east/west corridors in the City of Green Bay
- Medical area serves as a traffic generator
- Existence of Tax Increment Financing District #16
- Some sections have buffers between commercial and single-family land uses
- Large potential customer pool
- Existing infrastructure as a basis for redevelopment
- Close proximity to Lambeau Field

### Weaknesses

- Poor visibility and attraction from surrounding areas; nothing to “draw people in”
- No access onto Military Avenue directly from I-43
- Fox River Mall is only 30 minutes to the south
- Nearby large-scale retail as competition
- Need for specialty retail

- Too much of the same type of retail
- Access issues for pedestrians and vehicles at various locations
- Scale of development is not inviting
- Corridor is not aesthetically pleasing or inviting to pedestrians; above-ground utilities and signage give cluttered appearance
- Access to properties can be difficult
- Lack of theme, brand, or identity
- Presence of a few light industrial properties conflicts with corridor purposes
- Business composition centered too much on limited niche markets
- Building facades need updating
- Travel speed is too fast

### Key Observations

Examining the context in which Military Avenue exists, as well as the input gained through businesses and area residents during this initial project stage has led to several key observations about the Corridor, its role in the region, and how it might be improved. First and foremost, it is evident that the corridor possesses necessary and important characteristics acting as a foundation for its future success. The Corridor exists in a highly visible and prime location within a well-established transportation network and nearby important destinations such as Lambeau Field, Saint Mary's Hospital, the surrounding residential neighborhoods, and a planned future trail corridor. Proximity to US-41 provides easy connection of the corridor to the larger region. High traffic volumes combined with a large potential customer base in the immediate residential neighborhoods and throughout the region mean the area has room for increased economic activity. All of these characteristics provide the fundamental and foundational elements for which Military Avenue can build on for future growth.

Despite these important foundational elements that the Corridor has in its favor, it must work to give itself a clear and unique identity and make itself a more accessible, enjoyable, and attractive place to visit, all the while contending with growing competition from other important retail destinations in the region. Success will depend on how the Corridor is able to use its inherent strengths as it exists in the region and position itself as a unique player amongst the other competing areas in the region.







## MARKET ASSESSMENT

### INTRODUCTION

The economic context analysis builds on the physical context by examining the existing conditions and future potential of the retail, housing and office markets in the Military Avenue Corridor. This section contains an analysis of each market segment with a focus on current demand, gaps in existing supply and anticipated future market changes. Although the analysis in this section does not make specific revitalization recommendations, it does provide the necessary understanding of the economic environment to begin highlighting future market opportunities. The analysis and observations discussed in this chapter will be the foundation for identifying key transformative projects and driving the goals of the Military Avenue Market Analysis and Corridor Design Plan.

### DEFINITIONS

Throughout this document, carefully chosen labels will be used to describe retail types and important market concepts. The following list of definitions is intended to ensure there is no misunderstanding when discussing market potential along Military Avenue.

#### Trade Area

A trade area is the region from which a business draws most of its customers/clients. In this study, the trade area is primarily used to define the region from which retailers in the City of Green Bay and within the Military Avenue Corridor draw their customer base. Specifically, the boundaries of the Green Bay trade areas (Maps 2.1 – 2.5) estimate the point at which a household is no longer more likely to shop in Green Bay than in a competing retail area. In other words, all of the households within the defined trade areas are estimated to choose Green Bay as a retail destination at least 51 percent of the time. Using a trade area to define customer origin does not mean that any single business gets all or even most of its customers from within that area. Most of the retail data analyzed for this study is representative of the households within each of the different trade areas.

#### Capture Rate

The term capture rate will be used frequently in the retail market portion of this analysis. Capture rate measures the ability of retailers located within an area to capture the consumer spending of the surrounding trade area. For example, if within the primary trade area the Shoe Store Category has a capture rate of 25 percent for the Military Avenue Corridor, that means one-fourth of all the shoes purchased by residents of the surrounding neighborhoods come from stores within the Military Avenue Corridor. The remaining 75 percent are being “leaked” to stores outside the corridor. A low capture rate points to the possibility of adding retailers to an area to capture additional retail spending.

#### Supply Nodes

In this study, a supply node is a cluster of retail that, in the minds of a consumers, comprises a definable shopping “district”. The supply nodes analyzed during this process are the most important retail destinations in the City, and are the areas that the Military Avenue Corridor is directly competing with to attract both customers and businesses. The supply nodes chosen for this study, described later, are only a sampling of the retail options within the Green Bay area.

#### Convenience Retail

Convenience retail is a loosely defined collection of store types for which customers assign convenience as one of the primary attributes when making a retail decision. In addition, convenience retailers are typically the stores individuals frequent regularly. Retailers within this category include grocery stores, drug stores and general merchandise stores (e.g., Wal-Mart). The basis of a customer’s perception of convenience will vary. For example, some individuals may view businesses near their home as most convenient; others may prefer to shop near their place of employment.

#### Neighborhood Serving Retail

Neighborhood serving retail is similar to convenience retail in many ways, and convenience retail can certainly also act as neighborhood serving retail. In addition to the traits of convenience retail, neighborhood serving retail is comprised of the establishments



that local residents would patronize if given options located near their home. For example, hardware stores, restaurants, drug stores, small grocers/specialty food stores, dry cleaners, cafes, etc. Neighborhood serving retail is an excellent way to integrate a neighborhood into a retail district.

#### Destination Retail

Destination retail is defined by stores that draw customers from a larger distance than other retail entities, and also have the ability to attract customers specifically because of a unique product or service they provide. Destination retailers may draw customers from an area outside of the general retail trade area.

#### Boutique Retail

Boutique retail is a type of destination retail. Like destination retail, boutique retailers draw from a larger than average trade area and are often the ultimate destinations for "special trips" to a specific retail area. In short, all boutique retail is destination retail, but not all destination retail is boutique retail. What sets a boutique retailer apart from other destinations is the image, product offerings and clientele. In almost every case, boutique retail can best be described as "high-end." Boutique retailers typically cluster together and attract customers to a retail "district" not a single store.

#### Business-to-Business

Companies that fall into the business-to-business category are those that provide professional services to other professional firms. For example, architects, engineers and certified public accountants. Typically business-to-business firms locate in office buildings and do not demand the same level of visibility and traffic as retailers.

#### Service Businesses

Service businesses could also be labeled as business-to-consumer. These businesses provide services directly to consumers, e.g., tax preparers and insurance agents. Most medical clinics would also fall in this category. These businesses typically demand a high level of visibility and traffic, and will locate alongside retailers.

## **MARKET ANALYSIS APPROACH**

The purpose of the economic context analysis is two-fold. First, it is necessary to understand how the local and regional populations make decisions with regard to retail purchasing, housing choice and office demand. Second,

that information must be overlaid on the retail, housing and office landscape of the corridor and other competing supply nodes to determine how well the existing conditions serve the needs of those populations. Through that process, opportunities should emerge in areas where the existing supply is inadequate or misaligned with the current and projected demands of the population.

When conducting the analysis, it is important to acknowledge that consumer decision making processes are impacted by a variety of factors and variables. Raw data analysis, while important to understanding purchasing habits and overall supply, cannot on its own illuminate all of the factors and variables important to the study. Therefore, the approach used in this analysis combines quantitative market analysis along with qualitative research including stakeholder interviews, a business survey, public input and private sector input. The remainder of this section presents the qualitative and quantitative information that together explain the current and future Military Avenue Corridor Markets. This understanding will help uncover market opportunities to spur revitalization and private investment within the Corridor. These opportunities will be explored in the following chapter.

## **ECONOMIC ROLE OF CORRIDOR**

It is necessary to understand the current purpose and role of the Corridor before imagining what it could be in the future. To examine the economic position of Military Avenue, the analysis includes information on business mix, target markets, typical customers, housing options and existing office space.

### **Business Mix**

The business mix analysis sought to identify each establishment within the corridor and categorize it by basic business type.

The general business mix as shown in Table 2.1 reveals that based on the number of individual establishments, service businesses are the most common tenants along the Corridor with retail establishments a near second. The service business heading encompasses both personal and professional service providers. Together, service and retail businesses comprise 81 percent of total establishments in the study area. Examining the business make-up in more detail, Table 2.2 shows that the most common

business type in the Corridor is destination retail. Examples of destination retail in the Military Avenue Corridor include the Hobby Shop, Green Bay Vacuum and Sewing, Green Bay Stamp Shop and PJ's Collectibles. The business-to-consumer service establishments in the bank, insurance and tax preparation category were the second most represented business type, with cash advance stores third.

As an additional measure of business mix, Tables 2.1 and 2.2 also show an estimated distribution of establishments by square footage. On this basis, retail establishments comprise 64 percent of the building space along the corridor with service businesses contributing 20 percent. The occurrence of fewer, bigger retail establishments explains why some think of Military Avenue as a primarily retail corridor despite the larger number of service oriented establishments. The detailed data in Table 2.2 show a similar emphasis on destination retail based on square footage, but also reflect the larger amounts of space utilized by general retail and department/general merchandise retail anchors like Sears, Shopko, Big Lots, Walgreens, and Office Depot. Similar to the measure of business mix by number of establishments, retail and service businesses together comprise over 80 percent of the corridor by building space.

Not only is destination retail the most common business category and the second largest occupant of building space, but, after engaging numerous business owners in stakeholder interviews, it became clear that even businesses that would typically be considered general retail or service have strong destination retail characteristics. For example, Family Pet Food Center, a business type that usually is based on convenience or serving a local neighborhood, has developed a substantial base of customers

who travel from as far as 20 miles away because the store is one of the only in the region that sells raw and grain-free dog foods and specialty bird seed mixes. Likewise, Keith's Hair Center serves customers from three or more hours away because of their medical hair replacement products and services. All of this information suggests that the Corridor serves as a collection of small, but important destination retailers that have found a small niche that they are filling for the region at large.

TABLE 2.2: DETAILED BUSINESS MIX

Detailed Category	Percent Distribution (# of Bus.)	Square Footage of Businesses	Space Distribution
Specialty/Destination Retail	15%	224,440	16%
Bank/Insurance/Tax Preparation	9%	46,908	3%
Cash Advance	8%	31,992	2%
General Retail	8%	217,472	16%
Medical/Medical Related Services	7%	22,536	2%
General Service	6%	58,780	4%
Full Service Restaurant	6%	44,425	3%
Fast Food	5%	22,018	2%
Specialty/Destination Service	4%	6,043	0%
Auto Parts and Repair	4%	30,461	2%
Beauty Salons/Nails	4%	17,888	1%
Professional Service/Business Retail	3%	40,655	3%
Home Improvement/Home and Garden	3%	43,348	3%
Grocery/Liquor	2%	26,901	2%
Pet Related	2%	17,966	1%
Gas Station	2%	18,802	1%
Clothing Retail	2%	53,105	4%
Vehicle Dealership	2%	70,547	5%
Housing	1%	74,066	5%
Department/General Merchandise Store	1%	229,379	17%
Lodging/Hotel	1%	49,276	4%
Other	5%	42,906	3%
TOTAL	100%	1,389,914	100%

Source: Vierbicher, City of Green Bay

TABLE 2.1: GENERAL BUSINESS MIX

General Category	Percent Distribution (# of bus)	Square Footage of Businesses	Space Distribution
Service (Professional & Consumer)	45%	273,229	20%
Retail	36%	883,994	64%
Restaurants	11%	66,443	5%
Housing	1%	74,066	5%
Other	6%	91,182	7%
TOTAL	100%	1,389,914	100%

Source: Vierbicher, City of Green Bay



DRAFT

**Business Customer Base**

Another important component in understanding the Corridor's role in the local and regional economy is to understand the source of its customer base. To help gather insight into area businesses, a survey was distributed to nearly 200 establishments within the Study Area to gather data on numerous characteristics of local businesses. Respondents were asked to rank their top two customer markets from the following choices: *Surrounding Neighborhoods*, *Green Bay Metro Area*, *Visitors/Tourists*, *Commuters*, *Outside of Green Bay Metro Area*. The results are depicted in Figures 2.1 and 2.2. The responses identifying their primary customer market were somewhat evenly split between *Surrounding Neighborhoods* (54%) and the *Green Bay Metro Area* (44%), together accounting for 98 percent of responses. When asked to rank their second most important customer base, it became much more diverse with *Green Bay Metro Area* still the highest with 41 percent, but "Outside of Green Bay Metro Area" totaled a substantial 33 percent of responses.

This information points to the importance of local customers, but also confirms that numerous businesses have developed a strong niche that caters to a wide customer market outside of the Green Bay area.

**Lease Rates**

Lease rates help to determine the role of a corridor or node within a City by providing insight into the desirability of the location and, to a smaller extent, the economic performance of the businesses. This assumes that higher

desirability and better economic performance, although also related to each other, correlate to higher lease rates.

Based on the information gathered from property owners and businesses, the average lease rate for all business types in the Corridor is just over \$8.50 per square foot annually. The average for triple net leases, a common lease structure for retail tenants, is slightly higher at almost \$10.00 per square foot annually. Triple net is defined as a lease agreement that provides for the tenant to pay as additional rent, its proportionate share of real estate taxes, utilities, building insurance and common area maintenance such as snow plowing, landscaping and management.

**Relationship to Traffic**

As outlined in the Physical Context Analysis, traffic along Military Avenue and the major intersecting streets is substantial, but how does that traffic interact with local businesses? Research revealed that very few businesses rely on traffic to generate customers; however, some said that even if they do not capture customers directly from daily traffic, the higher traffic counts provide them visibility which can lead to people returning to the corridor to patronize their establishment. It is also interesting to note that commuters were the least cited customer group by businesses, yet Mason Street, Shawano Avenue, and Lombardi Avenue are major connections between the highway and downtown. This illustrates the Corridor's inability to draw commuters into the area for convenience purchases.

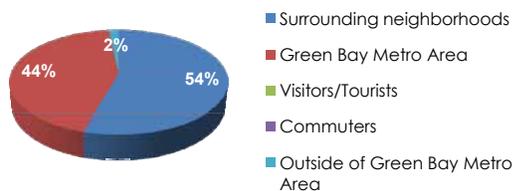
In the end, because the street does not have a lot of commuter traffic, the businesses that are successful there do not demand that type of customer or that level of consistent visibility. Instead, the Corridor businesses are destinations in and of themselves, or they are catering to the local traffic that uses the street as a common travel route.

Wisconsin Department of Transportation plans to reconfigure US-41 and the interchanges at Dousman Street and Shawano Avenue will have implications for traffic as it flows towards Military Avenue. Plans call for the combining of traffic on Dousman Street with traffic on Shawano Avenue into one route. Specific traffic projects are not known at this time.

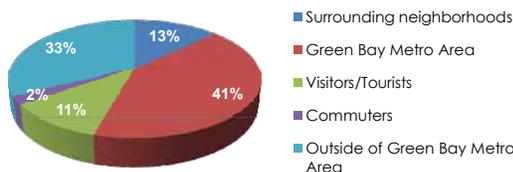
**Housing**

Economic role is determined not only by the presence and type of business, but also the occurrence of other land uses. There is little housing within the Military Avenue frontage parcels. However, extending off Military behind

**FIGURE 2.1: CUSTOMER ORIGIN- TOP RANKED**



**FIGURE 2.2: CUSTOMER ORIGIN- SECOND RANKED**



the commercial parcels, there is a substantial amount of multi-family housing including a few senior housing complexes including senior apartments, assisted living and nursing facilities. Multi-family housing is also located in a large cluster along Western Avenue. The neighborhoods surrounding the Corridor are primarily single-family homes. The homes are of modest size, but most are well maintained. Like many older urban areas, the densely spaced homes offer affordable housing options that are desirable for first time homeowners and the local workforce.

### Office

Business-to-business office space is very limited within the Study Area. There are two larger, multi-floor office buildings along Shawano Avenue across from St. Mary's Hospital, but their tenants are primarily medical clinics rather than business-to-business establishments. The Corridor is, however, home to business-to-consumer establishments such as tax preparers, insurance providers, etc. that are located among the Corridor's retailers and service establishments. The Corridor is a good location for consumer oriented businesses because they draw from the same customer base as the surrounding retail. Therefore, to some extent the health of the retail and the business-to-consumer establishments are related.

### Summary of Economic Role of the Military Avenue Corridor

The data gathered as part of the economic context points to the role of the corridor as largely a retail entity. Specifically, the Military Avenue Corridor functions as a common location for businesses that serve one of two, or very often a mix of both, purposes. One, many businesses along the corridor are destination retailers that have found a niche that they can fill within a 20+ mile range. Despite the large draw of these businesses they are not specialty boutique retailers where destination shoppers come for a day of browsing. If you need a product or service from one of the Corridor's destination businesses the trip is specifically to patronize that establishment. Two, many of the businesses also rely heavily on local traffic from the surrounding neighborhoods. Not well represented in the Corridor, with a few exceptions, are businesses that are frequented regularly, or are part of a normal shopping destination (e.g. general merchandise, grocery store, home improvement foods, etc.). Businesses in that category, which are often national/regional franchises, are concentrated in other areas in the City.

## STAKEHOLDER INPUT

As discussed earlier in this chapter, the key to fully understanding market conditions and identifying potential opportunities is to mix number crunching with qualitative insight from various stakeholder groups. This approach sought to do just that by relying heavily on stakeholder interviews, a business survey and public input. This section of the document provides a summary of that input as it relates to the market conditions and business environment. It is divided into business stakeholder input (owners, developers, managers, etc.) and public input.

### Business Stakeholder Input

To gather input from the business community, the analysis relied on a detailed business survey and one-on-one stakeholder interviews. The main themes below are a combination of the two information gathering tools and do not cover all of the information collected. The topic headings were developed based on patterns in the survey and interview results. They do not directly correlate to any specific survey or interview question. The summary provided in this section focuses on insight into business environment, revitalization challenges and opportunities. Complete summaries of the results can be found in Appendix Four.

#### Military Avenue Corridor's ability to meet the location needs of existing business:

- About half of the interview subjects said they would not locate on Military Avenue again if given the choice. The primary reason was lack of access to desired market and visibility, which this planning process is being conducted to address.
- When asked if they had any plans to expand or reduce operation in the next two years, 64 percent of survey respondents said they did not and 14 percent said they plan to expand at their current Corridor location. However, 22 percent said they are either planning to expand elsewhere or leave the corridor in the next two years. Reasons given for the desire to relocate were varied, and most were not controllable, but two businesses cited the desire to be in a "safer neighborhood," and one wanted access to more customer traffic.
- About one-fourth of respondents are planning on making improvements to their business or their property over the next two years. Investment in property is a sign of commitment to the area and the ability to operate a successful business at that location.



Customer Patterns

- Overwhelmingly, the busiest times of day for the respondents of the survey were between open and 4:00 pm. This reinforces the fact that the businesses are not serving commuters which would shift the busiest times of the day to before and after standard business hours.
- Many of the businesses owners interviewed reported that foot traffic from the local neighborhoods was common.

Business Challenges

- Survey respondents were asked to identify the challenges business are facing by ranking major issues, minors issues, and non-issues. A summary of responses is shown in Figure 2.3. The only challenge identified as a major issue was the lack of complementary businesses and anchors. Other issues appear to be local competition and non-local competition; these are explored further in the business survey.

Business Competition

- By a factor of more than four, when asked what retail node most competed with their establishment, respondents identified the Oneida St./Bay Park Mall Area. A very distant second was the City of Appleton. Surprisingly, only five respondents identified the Big Box node on Mason street as a primary competitor compared to 42 responses for Oneida St./Bay Park Mall and ten for Appleton.

Missing Complimentary and Anchor Businesses

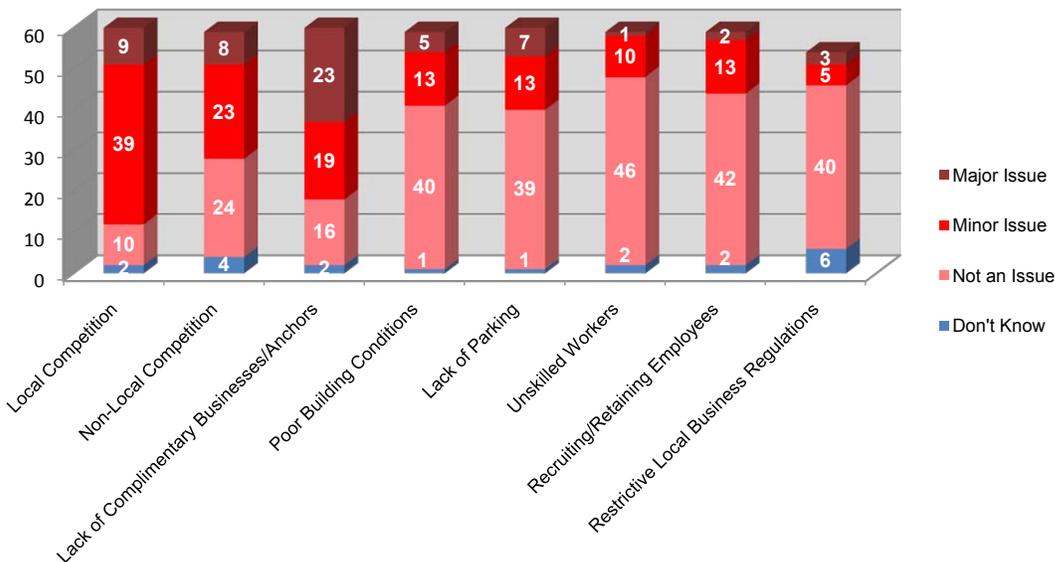
- To explore in more depth the need for complimentary and anchor businesses, survey respondents were asked to identify businesses that, while not currently in the corridor, would provide a benefit if they were to locate there. Summarized in Figure 2.4, results showed that restaurant and grocery store uses were, by far, the most often identified. Department Store/Big Box was also frequently mentioned. Based on respondents who provided more specific comments, the trend was toward an increased national retailer presence in the Corridor that would provide an established positive name-brand correlation. Grocery stores mentioned included Festival Foods, Whole Foods and Trader Joe's. Restaurants mentioned included nearly all full-service national brands.

Challenges to revitalizing the Military Avenue Corridor

Through both the business survey and one-on-one interviews, common themes emerged when discussing challenges with business owners. The following were of primary concern:

- Lack of identity
- Lack of unique draw to the corridor
- Aesthetics
- Lack of gateway from Lombardi Avenue
- Crime

FIGURE 2.3: MAJOR CHALLENGES FACING BUSINESS OWNERS



Opportunities present in the Military Avenue Corridor

Similar to challenges, stakeholders were asked to identify opportunities they felt could be capitalized on as part of the revitalization process, or leveraged to spur private investment. Although more varied than the themes that emerged when discussing challenges, common opportunities did present themselves. Note that many of the most common are corollaries to the identified challenges:

- Location and convenience
- Create an identity to improve image
- Bring in new customers
- Street reconstruction

Many stakeholders identified more specific opportunities. The most repeated include:

- Develop more restaurants/sports bar
- Attract a new grocery store or specialty food store
- Add additional "green things" (trees, plantings, etc.)

**PUBLIC INPUT**

In addition to the input from the business community, a public workshop was held to gather insight and opinions from the residents of the surrounding area and from the consumers who use the Corridor. Below is a summary of some of the information received from the public workshop as it relates to market opportunities and the business environment.

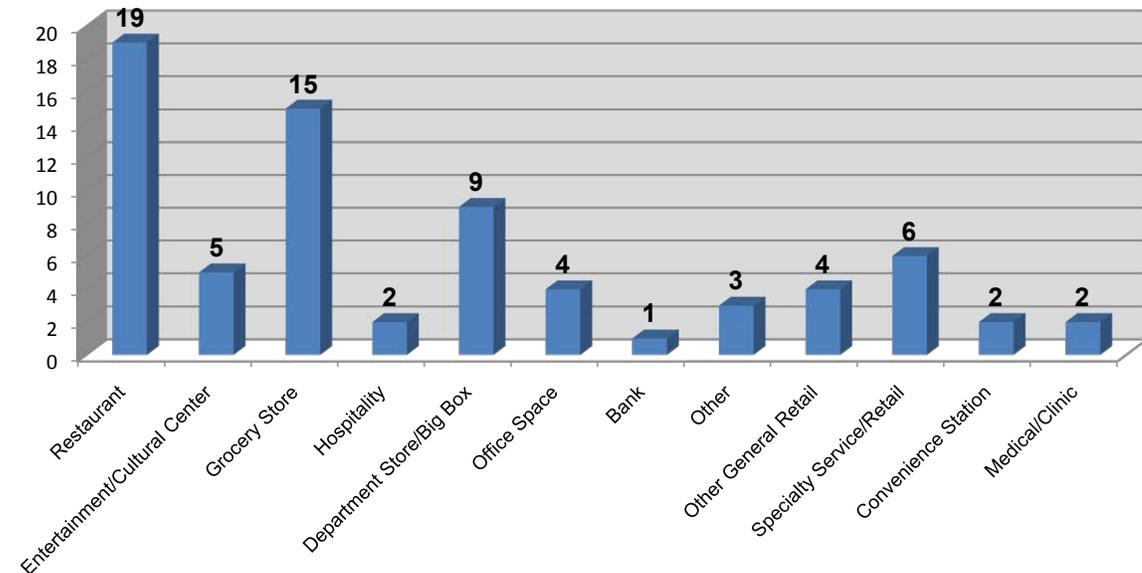
**Who attended the Workshop?**

Most of the workshop participants either live in the planning area or near the planning area. Out of the 22 people who responded, only five said that they either owned a business in the area, were employed in the area, or were a developer/landlord in the planning area. Three-quarters of the participants lived in Green Bay, and over 80% have lived in and/or done business in the corridor for more than 10 years.

**How does the Public use the Corridor?**

A similarly high number of people visit the corridor more than five times per month for shopping or services, and most of those trips occur during the week. All but two of the 22 people answering surveys said that it takes them less than 15 minutes to travel to the corridor from their house. Most of them visit the corridor for shopping or services, with lesser amounts commuting through or working in the corridor. Given the number

FIGURE 2.4: NEW BUSINESSES THAT COULD BENEFIT EXISTING BUSINESSES



of survey respondents who live close to (or in) the corridor and the number of trips they take per month to frequent corridor businesses, it is not surprising that most people do their weekly errands close to home.

However, in spite of the number of times per month that many people visit Military Avenue businesses, most (over three-quarters) go to Bay Park Square Mall for their specialty shopping needs. Responses were evenly split between Military Avenue and Bay Park for most-frequented retail area, suggesting that more people travel to Military Avenue for necessities, as opposed to specialty goods.

### **What are the Corridor's Strengths and Weaknesses?**

Feedback on the corridor's strengths and weaknesses were varied. Strengths that were listed include:

- Central location
- Variety of stores (cited several times)
- Convenience/accessibility/highway access
- Several specific stores/businesses (Shopko, Walgreens, CVS, family restaurants, Bay Motel, Sears, Ray's Tire)

Weaknesses identified include:

- No grocery store (cited many times)
- Too many check cashing businesses (cited many times)
- Not enough destination stores/lack of national icons/businesses (cited several times)
- Limited parking
- Difficult access (contrary to some who cited easy accessibility as a strength)
- A connection to I-43 is needed on the north end
- Too many dollar stores
- The district has an aged look and has "old businesses"
- Not enough restaurants

### **Key Businesses?**

Workshop attendees were also asked what businesses/types of businesses they most often patronize in the Military Avenue area, and what types of businesses they would most like to see added to the mix. The following are businesses that were mentioned by more than one person as popular destinations:

- Bay Family Restaurant (25)
- Harmony House (20)
- Office Depot (4)
- Walgreens/CVS/drug store (4)
- Shopko (3)
- Sears (2)
- Gas station/BP station (2)
- Naniots (2)
- Oneida Street (10-15)

### **What Businesses are Missing?**

The most desired retail for the area is a grocery store (requested by 8 people), followed by restaurants (5) and clothing stores (2). A few people simply requested "specialty shops or "quality stores," and one person suggested "whatever is possible to fill in the empty areas."

### **Summary of Stakeholder Input**

The results of the stakeholder input, while varied, reveals common and important themes among the business stakeholders and the public. The following bulleted list highlights some of the key insights.

- Business owners appear to be mixed on their feelings towards being located on Military Avenue. While the survey responses showed that most of the businesses are happy with their location and are not planning to leave the Corridor, a few said they are considering leaving. The stakeholder interviews revealed that several businesses would not choose to locate on Military Avenue if they had to make that decision today. The two reasons cited for being dissatisfied with a Military Avenue location were lack of customer access and perceived or real crime issues. Ultimately there does not seem to be a risk for a large number of businesses leaving the area, but there is some evidence that those concerns are preventing new business start-ups within the Corridor.
- Prior to the road reconstruction it could easily be argued that the Corridor was uninviting, and in many ways unsafe for pedestrian activity. In addition, there were few, if any, intentional connections into the neighborhood. Nonetheless, the input revealed that the businesses experience a surprising amount of foot traffic from local residents.
- Most of the business owners feel the lack of complementary businesses and anchors is significantly affecting the corridor and their business.

- When discussing challenges and opportunities it was clear that almost all stakeholders felt it is necessary to create an identity for the Corridor, improve its image, and attract new customers.
- Public input found that although the local neighborhoods do utilize the corridor businesses frequently, the majority of residents go to Oneida St./Bay Park Mall for specialty shopping needs.
- Primary concerns for the public were a lack of grocery store and far too many check cashing businesses.

## DATA ANALYSIS

The data analysis relies on quantitative measures of consumer habits (spending, housing choice, etc.) and measures of local supply. The purpose of the analysis is to use the data to uncover existing gaps in supply as well as to project how future changes in population and demographics will drive future demand. The data analysis focuses on the retail, housing and office market segments.

The opportunities found, while important to the process, will not all represent realistic market potential. Among other things, competing nodes, online shopping, changes in consumer behavior and desirability of the Corridor will impact how identified opportunities could actually be realized in Green Bay. For example, the demand and supply data may point to untapped sales in books. However, because of on-line book vendors and the rapidly changing landscape of the publishing industry, the existing untapped sales are likely being diverted to other commerce outlets (e.g., amazon.com), and future sales may largely be diverted to different mediums (e.g., ebooks). Additionally, the market analysis will only uncover opportunities related to gaps in supply and demand. It does not take into account business strategies that may influence location decisions not supported by market data (i.e. retailers seeking to block competitors from entering a marketplace, resulting in a 'Starbucks across the street from a Starbucks').

The data analysis presented in this section is segmented into retail, housing and office. Within each segment, the major components of the analysis are explained and the results presented. In a later section of this document, the findings discussed below will be combined with the qualitative analysis presented above to form packaged market opportunities.

## RETAIL ANALYSIS

The retail analysis focused on gathering spending data from five customer trade areas and sales data from nine different retail nodes and areas. The result is a comprehensive, quantitative picture of the Corridor's and City's ability to meet the demand of various consumer groups. This section provides an overview of the trade areas, the key supply nodes and an explanation of each major segment of analysis, along with key findings.

Summarizing all of the key findings is a Market Indicator Report. The indicator report takes the complex analysis described below and distills it into a single chart that highlights the product categories that show potential opportunity within each type of analysis. The entire indicator report is presented and further clarified before the explanation of the detailed analysis in order to provide a summary snapshot of the retail analysis results. For simplicity's sake, the detailed data tables that were used to conduct the retail analysis are not included within the following discussion. The complete tables are included in Appendix One.

### Trade Areas

The retail analysis conducted for this study examined five separate consumer trade areas. Each trade area captures a different geographic segment, and serves a slightly different purpose in the analysis. Below is a brief explanation of each trade area along with a map depicting its boundary.

#### Neighborhood Trade Area

The neighborhood trade area captures the local population cluster surrounding the Corridor. It is these households that make up the customer base that demands "neighborhood supporting" retail. The borders of the neighborhood trade area were defined to capture the geographic area that would view Military Avenue as a nearby, easily accessible destination. The data mined from this trade area was primarily used to analyze the spending potential of the local neighborhood and to determine whether the Corridor adequately meets the needs of the surrounding population.

#### City of Green Bay Trade Area

The City Trade Area encompasses the entire City of Green Bay. The trade area was used primarily to represent retail supply available within the area that most customers would consider the "Green Bay retail destination." Because some of the most critical retail offerings within the "retail



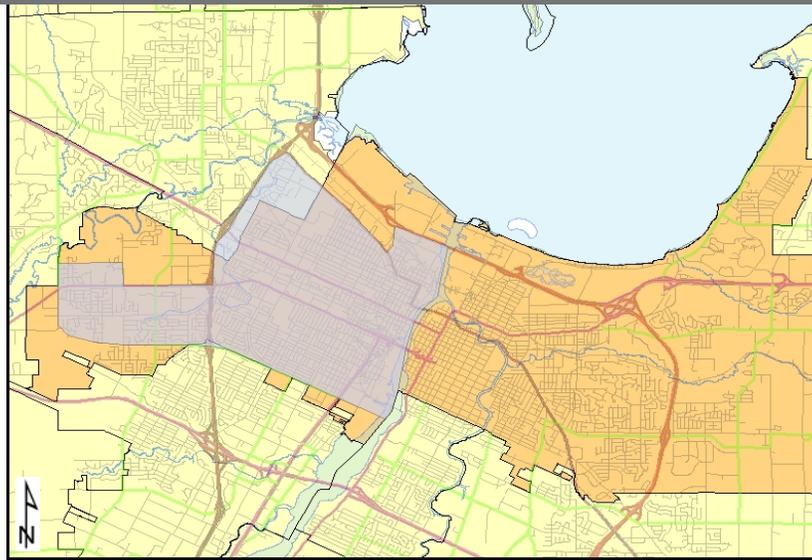
destination" are actually located in the Village of Ashwaubenon and, to a lesser extent, the Village of Howard, the data provided for the City of Green Bay Trade Area was modified to include the key retail nodes in other municipalities.

Primary Trade Area

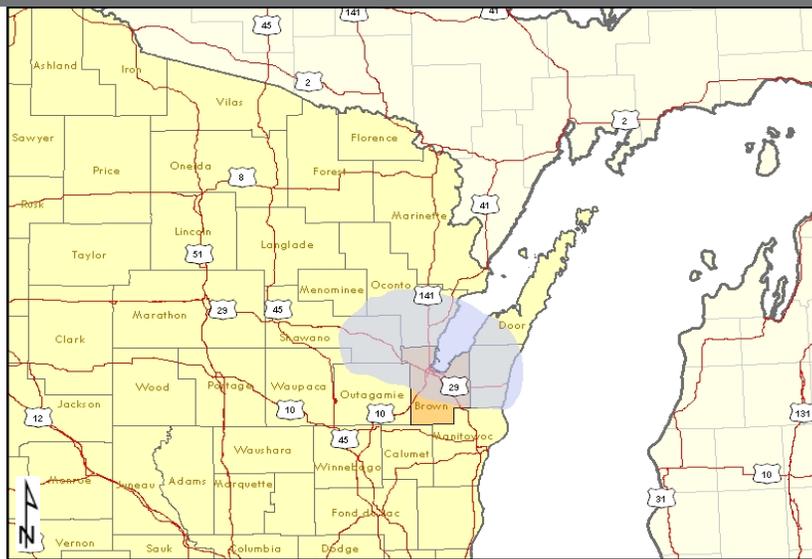
The primary trade area represents the households outside the City of Green Bay that still regularly travel to the City to shop due to a lack of retail available nearer to them. Although Green Bay

is the closest retail destination, there are product categories for which consumers will be less likely to travel to Green Bay, e.g., groceries, because of a higher level of availability of such products outside metro areas. The data from this Trade Area was primarily used to determine the ability of the City and the Corridor to attract and retain shoppers that are coming to the area for retail establishments that are unavailable in less populated communities.

MAP 2.1: NEIGHBORHOOD TRADE AREA



MAP 2.2: PRIMARY TRADE AREA



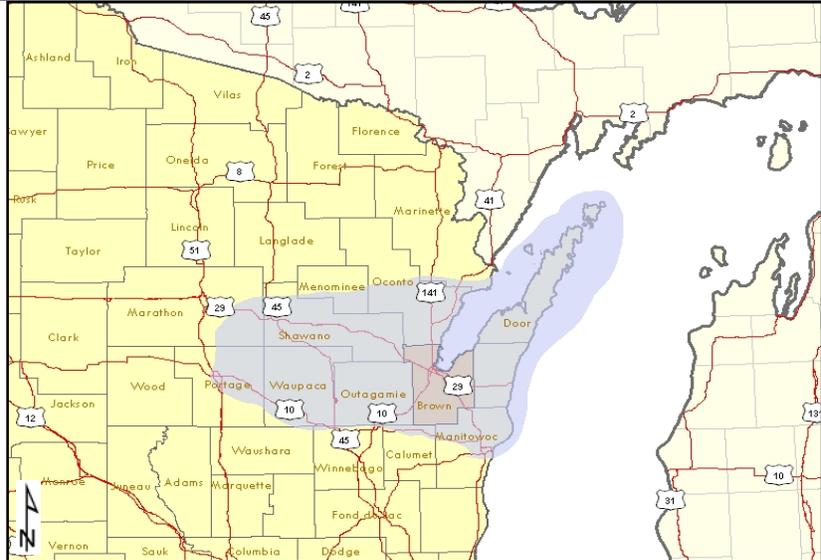
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Secondary Trade Area

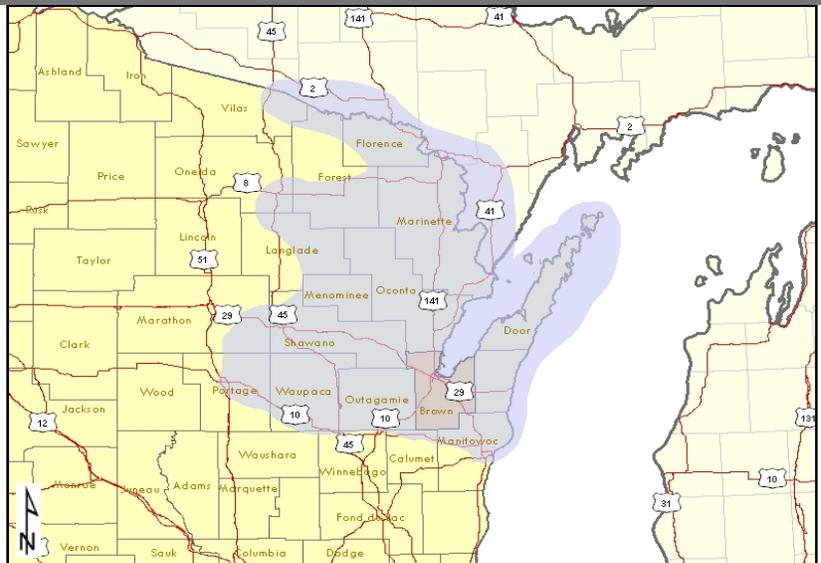
The Secondary Trade Area is comprised mostly of an area outside the City of Green Bay from which households travel to the region on an occasional basis. Because the Secondary Trade area is larger in size than the Primary, the percentage of consumers traveling to Green Bay will be lower, and the products for which they are

willing to travel will become more specialized. The data from this Trade Area was primarily used to determine the ability of the City and the Corridor to attract and retain shoppers that are coming to the area for retail establishments that are unavailable in less populated communities.

MAP 2.3: SECONDARY TRADE AREA



MAP 2.4: TERTIARY TRADE AREA



Tertiary Trade Area

The Tertiary Trade Area is the largest Trade Area examined in this analysis, extending all the way into Michigan’s Upper Peninsula. Few consumers from this area regularly travel to Green Bay, and those that do are likely coming for very specific reasons. Nonetheless, there is the potential to capture some sales from this area on trips that do occur, and this should be considered if attempting to capture destination shoppers.

**Supply Nodes**

The trade areas are critical to understanding consumer demand, and the supply nodes are the key piece in understanding local retail competition. The supply nodes were defined to capture the main competing retail areas in and around Green Bay. A map of all the supply nodes, along with a brief description of each, is provided below. It should be noted that the supply nodes are not intended to capture all of the retail sales occurring in the Green Bay Area. In addition, not all of the supply nodes data was used directly in calculations. However, all of the information on supply nodes was used to develop the report’s findings and provide insight into competition and opportunities.

Big Box Node

The “big box” area is centered on the US-41 corridor and W. Mason St. and Shawano Avenue. While not all of the retail in that area consists of big box establishments, the primary anchors include Wal-Mart, Festival Foods and Home Depot. The importance of this node is not necessarily what it currently offers in terms of retail choice, but the fact that it is a power center that draws significant traffic and is almost immediately adjacent to the Military Avenue Corridor. Because of those factors, it will be a magnet for future development, thus further restricting potential along Military Avenue.

Military Avenue Corridor

The Military Avenue Corridor is roughly defined by the study area boundaries, but does extend east along Mason Street to capture additional retail. The additional area is considered in the analysis because, in the mind of consumers, it is part of the largely unbroken stretch of offerings that extends from Military Avenue.

Oneida St./Bay Park Square Mall

The Oneida Street area was often cited by business owners and residents as the primary competitor for business along Military Avenue. It consists of a mix of small scale retailers and national franchises anchored by the Bay Park Square Mall. The high profile retailers also make it the primary retail draw in Green Bay and give it the desirability to attract future investment.

MAP 2.5: SUPPLY NODES



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Downtown

The downtown supply node covers the retail area on both sides of the river. The area, while not a significant competitor with the Military Avenue Corridor, was included because it is an important part of the City's retail environment.

Main/East Mason St.

The Main/East Mason St. supply node captures the highway-oriented retail on both Main Street and East Mason Street. The node is anchored by the mall complex on East Mason.

**Product Categories**

The analysis is conducted using 38 different product categories which represent most typical retail purchases. The product categories do not necessarily all correlate one-for-one with a specific store type, but they point to general retail classifications. For example, there are four or five separate product categories that encompass the home improvement retail sector. If any one of those categories shows opportunity, the others will be specifically explored to check to see if the home improvement is a viable retail opportunity. The 38 categories are listed in Table 2.3.

**Master Indicator Report**

As described briefly above, all of the data and analysis described in this section has been aggregated in a single indicator report. The purpose of the master indicator report is to distill the complex data analysis into a single visually comprehensible table. The indicator report has a column for each layer of analysis discussed below, and a row for each product category. Categories where the individual layers of analysis have revealed potential are highlighted in orange. No single column of the indicator report sufficiently assesses the possibility of attracting new retail in that category. Instead, the aggregate of all the layers of analysis depicted in the indicator report will help illuminate potential. By looking at all layers of analysis, a comprehensive picture of market conditions and market opportunity emerges. In short, the master indicator report is a dashboard for all of the data analysis discussed below and all of the tables found in Appendix One.

TABLE 2.3: PRODUCT CATEGORIES

Alcoholic Drinks	Lawn, Garden, and Farm Equipment & Supplies
All Other Merchandise	Lumber and Building Materials
Audio Equipment, Musical Instruments	Major Household Appliances
Automotive Fuels	Meals and Snacks
Automotive Lubricants	Men's Wear
Books	Optical Goods
Cars, Trucks, Other Powered Transportation	Packaged Liquor/Wine/Beer
Children's Wear	Paint and Sundries
Cigars, Cigarettes, Tobacco, Accessories	Paper and Related Products
Computer Hardware, Software and Supplies	Pets, Pet Foods and Pet Supplies
Curtains, Draperies, Blinds, Slipcovers Etc	Photographic Equipment and Supplies
Drugs, Health Aids and Beauty Aids*	RVs, Campers, Camping & Travel Trailers
Flooring and Floor Coverings	Sewing, Knitting and Needlework Goods
Footwear	Small Electric Appliances
Furniture and Sleep Equipment	Soaps, Detergents and Household Cleaners
Groceries and Other Foods	Sporting Goods
Hardware, Tools, Plumbing, Electrical	Televisions, Video Recorders, Video Cameras
Jewelry	Toys, Hobby Goods and Games
Kitchenware and Home Furnishings	Women's, Juniors' and Misses' Wear



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Merchandise Lines	CAPTURE OF LOCAL DEMAND				ATTRACT OUTSIDE DEMAND				FUTURE POTENTIAL		COMMUTING POTENTIAL	
	Target 1: Capture of Local Neighborhood (Less than 50%)	Target 2: Capture of City Less Neighborhood (Less than 50%)	Target 3: Capture of Trade Area (Less than 90%)	Target 4: Unspent Demand	Target 1: Primary Trade Area	Target 2: Secondary Trade Area	Target 3: Tertiary Trade Area	Target 4: Unspent Demand	Future Primary Trade Area Demand Ability to Support a Store	Future Secondary Trade Area Demand Ability to Support a Store	Dominant Commuter Spending Habits	
Alcoholic Drinks	All Sectors Less than 50%. See other measures of analysis for further refinement	All Sectors Less than 50%. See other measures of analysis for further refinement										
All Other Merchandise												
Audio Equipment, Musical Instruments												
Automotive Fuels												
Automotive Lubricants												
Books												
Cars, Trucks, Other Powered Transportation												
Children's Wear												
Cigars, Cigarettes, Tobacco, Accessories												
Computer Hardware, Software and Supplies												
Curtains, Draperies, Blinds, Slipcovers Etc												
Drugs, Health Aids and Beauty Aids*												
Flooring and Floor Coverings												
Footwear						Specialty						
Furniture and Sleep Equipment												
Groceries and Other Foods						Specialty						
Hardware, Tools, Plumbing, Electrical												
Jewelry												
Kitchenware and Home Furnishings												
Lawn, Garden, and Farm Equipment & Supplies												
Lumber and Building Materials												
Major Household Appliances												
Meals and Snacks												
Men's Wear												
Optical Goods												
Packaged Liquor/Wine/Beer												
Paint and Sundries												
Paper and Related Products												
Pets, Pet Foods and Pet Supplies												
Photographic Equipment and Supplies												
RVs, Campers, Camping & Travel Trailers												
Sewing, Knitting and Needlework Goods												
Small Electric Appliances												
Soaps, Detergents and Household Cleaners												
Sporting Goods												
Televisions, Video Recorders, Video Cameras												
Toys, Hobby Goods and Games												
Women's, Juniors' and Misses' Wear												



  
**Table 2.4: Master Indicator Report**
  
 Data Source: ESRI August 24, 2010

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### **Opportunities to Serve Local Population**

The first component of the analysis focuses on the Corridor's ability to serve the retail needs of the two local trade areas: the Surrounding Neighborhoods and the City as a whole. In other words, what portion of the money that local households spend on retail goods, is spent at businesses within the Corridor? To conduct this analysis, four layers of data were examined. Each layer is explained below along with a brief discussion of the key results.

#### Local Target One (Neighborhood): Methodology

The first step in the analysis is to compare surrounding neighborhood purchasing data by product category to total sales occurring within the Corridor to determine the Corridor's ability to capture local neighborhood retail spending. The resulting capture rate is used to determine the product categories for which the local neighborhood population patronizes businesses in the Corridor, and the categories for which the neighborhood population travels to other retail areas.

#### Local Target One (Neighborhood): Results

The first analysis reveals that the capture rate for the Corridor is below 40 percent for every product category except Drug, Health and Beauty Aids. This means that, on average, less than 40 percent of the retail dollars spent by neighborhood households is being spent at Corridor businesses. The higher Drug, Health and Beauty Aids capture rate is unsurprising given the presence of both a CVS and a Walgreens, which likely serve commuters as well as the surrounding population. It should be noted that not all product categories are well represented in the corridor (e.g., groceries) and, therefore, would be expected to have low capture rates. In addition, the somewhat niche nature of many of the businesses along the corridor means they are either not well represented by the traditional product categories in the analysis, or their business model relies on a trade area much larger than the local neighborhoods. Nonetheless, the uniformly low capture rate points to a relative disconnect between neighborhood serving retail needs and the supply present along the Corridor.

#### Local Target Two (City): Methodology

Building on step one, the capture rate calculation was extended to the entire City of Green Bay to determine how much City-wide demand was captured by businesses along Military Avenue.

#### Local Target Two (City): Results

When the analysis is expanded to include retail demand for the entire City of Green Bay compared to the supply of Military Avenue, the capture rates decrease in all categories. Given the presence of competing nodes throughout the City, this is an inevitable result.

Given the low capture rates in virtually every category, it is necessary to add additional layers of analysis to fully understand the potential the Corridor may have to provide more neighborhood serving retail opportunities.

#### Local Target Three (Trade Area): Methodology

The third step of the analysis compared the retail demand of all Green Bay residents to the supply of all Green Bay retail (including the nodes in Ashwaubenon and Howard). This was done to determine the ability of the competing nodes and the Green Bay area as a whole to meet City-wide demand. Because Green Bay is a regional retail destination it serves a population larger than the City itself. Therefore, City retailers would be expected to sell more products than the City residents alone purchase. By extension, if in any product category there are less City sales than there is City demand, then the assumption is that product category is not supplied well enough within the City. If a product category is undersupplied, the demand for that category is either being satisfied through other channels, (e.g., internet sales), or it may hold potential for the Military Avenue Corridor.

Local Target Three (Trade Area): Results

This calculation found that overall the Green Bay Area sells more retail goods than it demands. This result is fully expected because the area attracts consumers from outside the City itself. However, some of the categories still showed lower capture rates as compared to the aggregate results. In this instance, based on the distribution of capture rates among all 38 categories, it was determined that capture rates below 90 percent should be highlighted. The following product categories rose to the top (capture rate in parenthesis):

- Books (69%)
- Cars, Trucks and Other Powered Transportation (65%)
- Cigars, Cigarettes, Tobacco and Accessories (78%)
- Computer Hardware, Software and Supplies (67%)
- Optical Goods (78%)
- RVs, Campers, Camping and Travel Trailers (51%)

It should be noted that some of these categories are subject to other market pressures that impact their capture rates. For example, internet sales will significantly impact the capture rate of books, and optical goods (1-800-Contacts). These extenuating circumstances are used to filter opportunities later in the process.

Local Target Four (Unspent Potential): Methodology

The fourth analysis angle goes beyond capture rates to assess the ability of unmet local demand to support new retail in the Military Avenue Corridor. To accomplish this, within each product category, the approximate number of retail establishments west of the river was determined. Then, the average sales per establishment in the City of Green Bay was compared to the unmet demand from the local neighborhood to determine whether there was a possibility of capturing some unmet demand in a new store. The analysis works like this:

*If local neighborhood residents annually purchase \$2,000,000 of shoes, but in total Military Avenue businesses only sell \$1,000,000 of shoes per year, then at a minimum, Military Avenue businesses are failing to capture \$1,000,000 of local neighborhood shoe sales. If we assume that the \$1,000,000 "leaking" from the Corridor are captured by surrounding competition, and we know that there are 10 shoe stores west of*

*the river, then on average each store would be capturing \$100,000 of leaked neighborhood sales. The data used in the analysis also tells us that the average sales per shoe store in the City of Green Bay is \$500,000. Given those results, the local neighborhood sales, if captured by the competing stores, would account for only 1/5 of total store sales. Based on shoe stores typical of the trade area, this is a very reasonable expectation of shoe stores' ability to draw from the surrounding neighborhood. Therefore, the data does not suggest that local neighborhood households are having difficulty meeting their demand for shoes, and therefore, no real opportunity exists once surrounding competition is factored in. Given the nature of the existing stores along Military Avenue, this analysis must also consider the possibility of capturing a specialty market that may not come through in the data because it is being clouded by general product sales.*

Local Target Four (Unspent Potential): Results

The results of this analysis revealed four product categories that show potential after competing retail is factored in:

- Meals and Snacks (restaurants)
- Footwear
- Groceries and Food Stores
- Alcoholic Drinks (bars, pubs, etc.)

The footwear category is an example of an opportunity that is only marginal when comparing the raw data, but may present an opportunity for a specialty store dealing in, for example, outdoor apparel and shoes, or soccer shoes and equipment. The groceries and food stores category is also a specialty opportunity. General grocery store sales are secured by surrounding competition, but, based on data and public input, specialty opportunities like a butcher may be feasible. The alcoholic drinks and meals/snacks categories can both be satisfied by restaurants that serve alcohol.

To summarize the results for this section, the "Capture of Local Demand" indicator report is presented in Table 2.5. The four columns included in the report correspond to the four sets of analysis presented above.

TABLE 2.5: CAPTURE OF LOCAL DEMAND

Merchandise Lines	Target 1: Capture of Local Neighborhood (Less than 50%)	Target 2: Capture of City Less Neighborhood (Less than 50%)	Target 3: Capture of Trade Area (Less than 90%)	Target 4: Unspent Demand	
Alcoholic Drinks	All Sectors Less than 50%. See other measures of analysis for further refinement	All Sectors Less than 50%. See other measures of analysis for further refinement			
All Other Merchandise					
Audio Equipment, Musical Instruments					
Automotive Fuels					
Automotive Lubricants					
Books					
Cars, Trucks, Other Powered Transportation					
Children's Wear					
Cigars, Cigarettes, Tobacco, Accessories					
Computer Hardware, Software and Supplies					
Curtains, Draperies, Blinds, Slipcovers Etc					
Drugs, Health Aids and Beauty Aids*					
Flooring and Floor Coverings					
Footwear					Specialty
Furniture and Sleep Equipment					
Groceries and Other Foods					Specialty
Hardware, Tools, Plumbing, Electrical					
Jewelry					
Kitchenware and Home Furnishings					
Lawn, Garden, and Farm Equipment & Supplies					
Lumber and Building Materials					
Major Household Appliances					
Meals and Snacks					
Men's Wear					
Optical Goods					
Packaged Liquor/Wine/Beer					
Paint and Sundries					
Paper and Related Products					
Pets, Pet Foods and Pet Supplies					
Photographic Equipment and Supplies					
RVs, Campers, Camping & Travel Trailers					
Sewing, Knitting and Needlework Goods					
Small Electric Appliances					
Soaps, Detergents and Household Cleaners					
Sporting Goods					
Televisions, Video Recorders, Video Cameras					
Toys, Hobby Goods and Games					
Women's, Juniors' and Misses' Wear					

**Opportunities to Attract Consumers from Greater Trade Areas**

The Green Bay area is a retail destination for people living in the smaller, surrounding communities. As illustrated by the trade areas presented earlier, the geographic regions from which Green Bay retail pulls customers can be quite large. The purpose of this analysis is to identify the product categories for which

regional trade area residents must travel to a larger retail destination to make purchases; and then, by extension, determine if that destination is the Green Bay area, and if the Military Avenue Corridor can capture some of those sales. This will identify the product segments trade area residents have trouble finding outside of Green Bay, and if there is opportunity to supply those needs within the Military Avenue Corridor.



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It should be noted that the opportunity for Military Avenue to attract sales from larger trade area households is difficult because of already established destination nodes; namely Oneida Street/Bay Park Mall, and the Big Box nodes. Consumers who travel into a metro area to shop prefer to stay within the same district to increase trip efficiency. If new retail opportunities to

serve the trade area population exist, it will be difficult to locate them outside of the already established nodes.

Like the examination of local opportunities, sequential levels of analysis are presented below, although in less detail than in the local market example.

TABLE 2.6: ATTRACT OUTSIDE DEMAND

Merchandise Lines	Target 1: Primary Trade Area	Target 2: Secondary Trade Area	Target 3: Tertiary Trade Area
Alcoholic Drinks			
All Other Merchandise			
Audio Equipment, Musical Instruments			
Automotive Fuels			
Automotive Lubricants			
Books			
Cars, Trucks, Other Powered Transportation			
Children's Wear			
Cigars, Cigarettes, Tobacco, Accessories			
Computer Hardware, Software and Supplies			
Curtains, Draperies, Blinds, Slipcovers Etc			
Drugs, Health Aids and Beauty Aids*			
Flooring and Floor Coverings			
Footwear			
Furniture and Sleep Equipment			
Groceries and Other Foods			
Hardware, Tools, Plumbing, Electrical			
Jewelry			
Kitchenware and Home Furnishings			
Lawn, Garden, and Farm Equipment & Supplies			
Lumber and Building Materials			
Major Household Appliances			
Meals and Snacks			
Men's Wear			
Optical Goods			
Packaged Liquor/Wine/Beer			
Paint and Sundries			
Paper and Related Products			
Pets, Pet Foods and Pet Supplies			
Photographic Equipment and Supplies			
RVs, Campers, Camping & Travel Trailers			
Sewing, Knitting and Needlework Goods			
Small Electric Appliances			
Soaps, Detergents and Household Cleaners			
Sporting Goods			
Televisions, Video Recorders, Video Cameras			
Toys, Hobby Goods and Games			
Women's, Juniors' and Misses' Wear			

External Targets 1-3 (Primary-Tertiary Market Areas): Methodology

As with the local demand analysis, the demands of the primary, secondary and tertiary trade area residents were compared to retail sales within the same geographies. In all cases, the City of Green Bay data was removed to ensure the analysis was measuring only retail activity within the trade area, but outside the City. The purpose of the analysis is to identify product categories where available trade area retail stores do not satisfy demand and, therefore, consumers must travel to a larger retail destination to find needed products. Given the location, those destinations are likely either in the Green Bay area or the Appleton area.

External Targets 1-3 (Primary-Tertiary Market Areas): Results

The "Attract Outside Demand" portion of the indicator report found in Table 2.6 illustrates the product categories from each trade area for which consumers must travel to a larger retail destination. As would be expected, as distances were increased due to larger trade areas, the number of products for which consumers still had to travel outside the trade area fell. The following layer of analysis will examine those product categories to determine whether the consumer demand is satisfied by existing Green Bay supply nodes, and if some new or diverted sales could be captured within the Military Avenue Corridor.

External Target Four (Unspent Potential): Methodology

Like the local neighborhood analysis, the data on unmet demand was then compared to Green Bay average store sales to determine what gaps might exist within the Green Bay area's ability to attract larger trade area sales (Figure 2.7). In addition, the analysis factored in the likelihood that Military Avenue could be a location to capture unmet sales as opposed to the competing nodes.

External Target Four (Unspent Potential): Results

The second layer of analysis revealed four categories after filtering the data and factoring in competition and location desirability:

- Footwear
- Jewelry
- Sewing, Knitting and Needlework Goods
- Toys, Hobby Goods and Games

The identification of the above sectors is determined strictly by the presence of a supply and demand imbalance. There are currently retailers that fall within each of the above categories, but spending levels point to missed opportunity within the category on a broader scale. This opportunity could be captured through the addition of complementary shops

**TABLE 2.7: ATTRACT OUTSIDE DEMAND**

Merchandise Lines	Target 4: Unspent Demand
Alcoholic Drinks	
All Other Merchandise	
Audio Equipment, Musical Instruments	
Automotive Fuels	
Automotive Lubricants	
Books	
Cars, Trucks, Other Powered Transportation	
Children's Wear	
Cigars, Cigarettes, Tobacco, Accessories	
Computer Hardware, Software and Supplies	
Curtains, Draperies, Blinds, Slipcovers Etc	
Drugs, Health Aids and Beauty Aids*	
Flooring and Floor Coverings	
Footwear	
Furniture and Sleep Equipment	
Groceries and Other Foods	
Hardware, Tools, Plumbing, Electrical	
Jewelry	
Kitchenware and Home Furnishings	
Lawn, Garden Equipment & Supplies	
Lumber and Building Materials	
Major Household Appliances	
Meals and Snacks	
Men's Wear	
Optical Goods	
Packaged Liquor/Wine/Beer	
Paint and Sundries	
Paper and Related Products	
Pets, Pet Foods and Pet Supplies	
Photographic Equipment and Supplies	
RVs, Campers, Camping & Travel Trailers	
Sewing, Knitting and Needlework Goods	
Small Electric Appliances	
Soaps, Detergents and Household Cleaners	
Sporting Goods	
Televisions, Video Recorders, Video Cameras	
Toys, Hobby Goods and Games	
Women's, Juniors' and Misses' Wear	



providing additional selection, or through the addition of multiple goods stores. For instance, Joanne Fabrics provides both hobby/craft goods and sewing supplies. Similarly, as noted previously, footwear potential is likely only present in specialty product areas.

**Future Retail Potential**

The third group of analysis examines future retail potential based on anticipated household growth. This analysis is intended to identify product categories that show sustainable opportunity into the future based on estimated household spending that will occur within those categories over the next ten years.

Method

The future retail potential analysis determined total retail spending per household for the primary and secondary trade areas. Then, holding spending distribution and capture rates constant, the increase in spending for each product category over the next ten years was estimated based on projected household growth within the primary and secondary trade areas. It should be noted that because the analysis maintains the existing conditions into the future (capture rates, incomes, etc.), if conditions change, for example capture rates, future potential will also change. In other words, if Military Avenue is successful in developing some new retail and, as a result, the Corridor's capture of the Primary and Secondary trade area increases, future potential will also increase. The tertiary trade area was not examined because it represents very limited and specific potential in terms of product categories.

Using the projected future retail sales calculations, total future sales from the primary and secondary trade areas were compared to average store sales to determine if any of the projected increases could necessitate additional retail. The projected sales must do more than just meet average sales; they must significantly exceed them because existing stores can absorb some new sales before a new business is demanded.

Results

The segments in which future sales appear to present the greatest potential to support additional stores by 2015 are shown in the "Future Potential" portion of the indicator report.

**Opportunities to Capture Commuter Spending**

The final component of the retail data analysis looks at the potential to capitalize on commuter spending. Commuters are an important customer segment because they spend money at retail and restaurant establishments near their places of work or along their commuting routes. This analysis seeks to identify the type

TABLE 2.8: FUTURE POTENTIAL

Merchandise Lines	Future Primary Trade Area Demand Ability to Support a Store	Future Secondary Trade Area Demand Ability to Support a Store
Alcoholic Drinks		
All Other Merchandise		
Audio Equipment, Musical Instruments		
Automotive Fuels		
Automotive Lubricants		
Books		
Cars, Trucks, Other Powered Transportation		
Children's Wear		
Cigars, Cigarettes, Tobacco, Accessories		
Computer Hardware, Software and Supplies		
Curtains, Draperies, Blinds, Slipcovers Etc		
Drugs, Health Aids and Beauty Aids*		
Flooring and Floor Coverings		
Footwear		
Furniture and Sleep Equipment		
Groceries and Other Foods		
Hardware, Tools, Plumbing, Electrical		
Jewelry		
Kitchenware and Home Furnishings		
Lawn, Garden, and Farm Equipment & Supplies		
Lumber and Building Materials		
Major Household Appliances		
Meals and Snacks		
Men's Wear		
Optical Goods		
Packaged Liquor/Wine/Beer		
Paint and Sundries		
Paper and Related Products		
Pets, Pet Foods and Pet Supplies		
Photographic Equipment and Supplies		
RVs, Campers, Camping & Travel Trailers		
Sewing, Knitting and Needlework Goods		
Small Electric Appliances		
Soaps, Detergents and Household Cleaners		
Sporting Goods		
Televisions, Video Recorders, Video Cameras		
Toys, Hobby Goods and Games		
Women's, Juniors' and Misses' Wear		

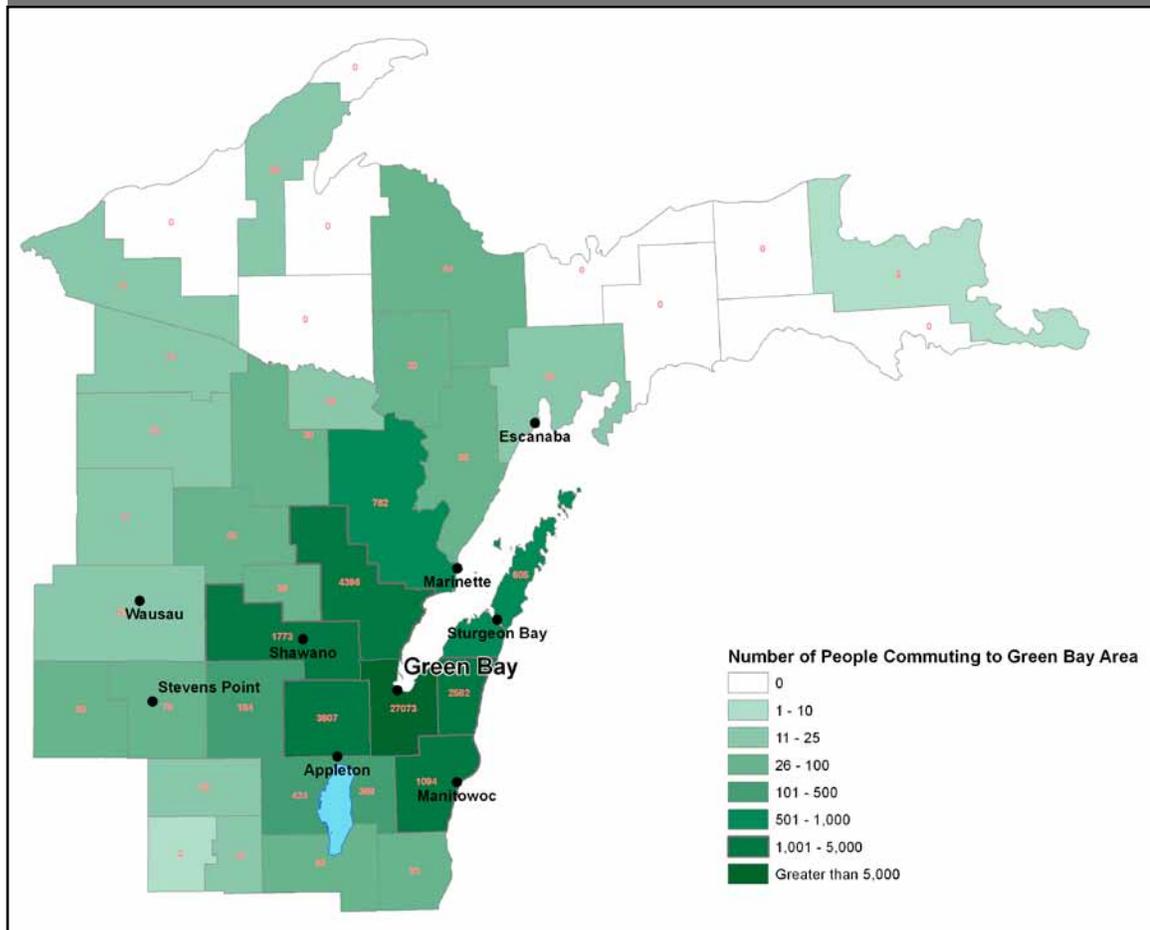
and quantity of those potential sales. There are a few caveats in terms of commuter potential. Given the availability of data, commuter information is only available at the City level. Therefore, the data shows the number of people traveling to Green Bay, but not the routes they take. Therefore, the numbers presented obviously include commuters that never travel near the Military Avenue Corridor. In addition, the physical context and qualitative portion of the analysis revealed that Military Avenue itself is not a commuter corridor, but Mason Street, Lombardi Avenue and, to a lesser extent, Shawano Avenue are commuter corridors. This data assumes the ability to capture some of those commuters. These issues will be explored further in later portions of this document.

The nature of the commuter analysis does not lend itself to the same format as the earlier discussions. Instead, the method and results are discussed together.

Method and Results

Based on the 2008 Commuter Census data, 43,597 people commute into Green Bay for employment (Map 2.6). Of those, 30,150 come from within the Primary, Secondary or Tertiary trade areas. Based on the analysis done for future retail potential, the households within those trade areas spend approximately \$38,500 total on retail goods per year, some of which (about 12 to 13%) is likely spent near their places of employment. Based on a commuter spending studies conducted by University of Wisconsin Extension, commuters spend approximately \$95 per week per person (adjusted for 2010 dollars). That totals \$150 million annually of retail spending by commuters entering Green Bay. The same research has segmented those sales into groups. Based on that research and the total commuter potential, commuters likely represent about \$31 million in grocery sales per year, \$36 million in

MAP 2.6: COMMUTERS TO GREEN BAY



restaurants, \$67 million in retail and \$13.5 million in other categories. Within the retail category, additional research has shown that the most common commuter retail purchases are furniture, general merchandise, apparel, auto products and building/home supplies. Because those sales will be distributed across the City, none of them on their own will be sufficient to support new retail stores, but they do account for one piece of a future market opportunity. The

“Commuting Potential” portion of the indicator report shows the product categories that attract the most commuting dollars.

**Summary and Impact of Retail Data Analysis**

The retail data analysis offers a wealth of quantitative insight into the market environment in and around Military Avenue. Some of the key observations that arose from the analysis follow. It is these observations that will play a key role in identifying transformative opportunities for revitalization.

TABLE 2.9: COMMUTING POTENTIAL

Merchandise Lines	Dominant Commuter Spending Habits
Alcoholic Drinks	
All Other Merchandise	
Audio Equipment, Musical Instruments	
Automotive Fuels	
Automotive Lubricants	
Books	
Cars, Trucks, Other Powered Transportation	
Children's Wear	
Cigars, Cigarettes, Tobacco, Accessories	
Computer Hardware, Software and Supplies	
Curtains, Draperies, Blinds, Slipcovers Etc	
Drugs, Health Aids and Beauty Aids*	
Flooring and Floor Coverings	
Footwear	
Furniture and Sleep Equipment	
Groceries and Other Foods	
Hardware, Tools, Plumbing, Electrical	
Jewelry	
Kitchenware and Home Furnishings	
Lawn, Garden, and Farm Equipment & Supplies	
Lumber and Building Materials	
Major Household Appliances	
Meals and Snacks	
Men's Wear	
Optical Goods	
Packaged Liquor/Wine/Beer	
Paint and Sundries	
Paper and Related Products	
Pets, Pet Foods and Pet Supplies	
Photographic Equipment and Supplies	
RVs, Campers, Camping & Travel Trailers	
Sewing, Knitting and Needlework Goods	
Small Electric Appliances	
Soaps, Detergents and Household Cleaners	
Sporting Goods	
Televisions, Video Recorders, Video Cameras	
Toys, Hobby Goods and Games	
Women's, Juniors' and Misses' Wear	

Observation One

The Corridor is in a difficult position spatially. Located in very near proximity to Military Avenue are two established nodes that provide both destination and convenience retail: the Big Box Node and Oneida St./Bay Park Square. This location creates several challenges to future retail development within the Military Avenue Corridor.

1. It will be difficult to duplicate automobile-oriented convenience oriented retail (e.g. grocery stores, home improvement, etc.) along Military Avenue because it is so close to the Big Box Node. Due to the Big Box Node's relative proximity to the neighborhoods surrounding Military Avenue, there will not be the added convenience factor for those neighborhoods that can sometimes attract convenience retail to a corridor like Military Avenue.
2. When more distant households come to Green Bay for retail shopping, they typically would like to stay within one or two retail districts to increase the efficiency of their trip, because the two established nodes already exist it will be difficult to pull those customers into a third retail area.
3. Compounding both of those difficulties is the fact that potential future retailers, particularly national chains, will likely have siting criteria that includes the presence of other national retailers. For example, Wal-Mart often seeks out locations near Home-Depot. If future retailers have those requirements Military Avenue will not be as desirable as the other established nodes. Specific siting requirements for selected retailers within sales categories identified through the market analysis and/or mentioned in the input process are included in table 2.10. This table also identifies siting criteria for retailers publicly perceived to be over-represented in the district for purposes of comparison.

Observation Two

The businesses along the corridor do not capture high levels of local spending. That being said, the qualitative input suggests that neighborhood residents are a key customer base for the businesses along the corridor. The disconnect between the data and the qualitative input is likely due to the fact that any local spending by neighborhood residents will be significant to the smaller retailers that populate the Corridor. This conclusion is supported by the fact that qualitative data also found that most of the residents use other competing nodes for specialty or more substantial shopping. The consistent, but minimal support of the local neighborhood points to the need to attract new customers to the area. Without new people to act as consumers for the businesses, the local neighborhood will likely not be sufficient to support significant retail growth or new opportunities.

Observation Three

Although the likelihood of attracting national retailers or restaurant chains is limited throughout the corridor, the intersection of Military Avenue and Mason Street should hold potential to develop one or two key national anchors. Given the data analysis and the qualitative input, the most likely short-term national anchor opportunity would be in the form of a restaurant. Because of the importance of anchor establishments to attract new consumers to the area these opportunities should be the most aggressively pursued.

Observation Four

Although nationals are an unlikely target outside a few key locations along the Corridor, there appears to be potential to leverage the existing small scale, specialty retail environment to develop further concentrations of those types of businesses. This strategy may be particularly appropriate for capturing sales in categories that would otherwise be filled or attracted to other competing retail nodes. For example, a general footwear store, a category that did

TABLE 2.10: RETAILER SITING REQUIREMENTS

Category/Retailer	Required Population /Income	Site/Traffic Requirements	Comments
<b>Grocery</b>			
Trader Joe's	90,000 in 3 miles Avg HH Inc \$50,000	10-14,000 SF	Requirements often higher based on competing options
Whole Foods	100,000 in 10 miles	40-75,000 SF Signaled Intersection	High % College Educated
The Fresh Market	125,000 in 5 miles	18-23,000 SF 25,000 cars/day	Upscale Co-Tenants
<b>Full-Service Restaurant</b>			
Buffalo Wing Factory	40,000 in 5 miles Med HH Inc: \$30,000	5-6,000 SF Grocery Co-Tenants	80% Pop aged 20-50
Chili's Bar & Grill	High density mld-upper income	3,900-5,500 SF 250,000 SF Center	Big Box Co-Tenants Prefers to own
Old Spaghetti Factory	200,000 in 5 miles 30,000 daytime pop.	8-10,000 SF 45,000 cars/day	Prefer architecturally interesting bldg.
<b>Specialty Retail</b>			
The Walking Company	None Specified	1-5,000 SF larger mall co-tenancy	Co-Tenants Drive Decision
Shoe Show	15,000 in 3 miles all income considered	3-5,000 SF 43' minimum frontage	National Fashion Co-Tenants
Guitar Center	None Specified	10-16,000 SF 100 SF frontage	Prefer Franchise
Check Cashing	10,000 in 1 mile \$30,000 median HH Inc.	20,000 cars/day	20% Rental Units, High School Education
Dollar Stores	20,000 in 5 miles Avg HH Inc: \$25-\$60,000	8-12,000 SF	Trade area 1 mile urban to 10 miles in rural areas

Source: Retail Lease Trac, Individual Retailers, Vierbicher

show potential, such as Design Shoe Warehouse (DSW) would almost always locate near a shopping mall node; which is true of the DSW in the Green Bay area. However, opportunity in the footwear segment may be able to be captured by Military Avenue if it is in form of a specialized store focused on running or athletics. Run Away Shoes is located on Oneida Street, but is the only such store in the Green Bay area.

Other sectors where the potential exists to expand on an existing niche category in this same manner include grocery (butcher, deli, etc.), sewing, knitting and needlework goods, and toys, hobby goods and games. Although not as dramatic as attracting new national chains, developing additional niche stores can serve to simultaneously satisfy some local demands while also bringing new customers into the Corridor. These customers may already be visiting existing category stores such as Michael's and Toys R' Us, but may shop more frequently or for a longer period with the addition of complementary retail. New smaller scale retail may also fit better within the existing character of the Corridor.

#### Observation Five

Although commuter traffic holds substantial retail sales potential, the categories in which it is most concentrated are already well served by the competing nodes that are better located to capture commuter traffic

#### Observation Six

Due to the limited future growth of the City of Green Bay, long-term potential is centralized in the Primary and Secondary Trade Areas. Although Military Avenue does not have the ability to capture those consumers to a great extent currently, the fact that future potential lies in those areas means revitalization efforts should build toward creating a destination that can attract distant customers.

### **Psychographic Analysis**

The psychographic analysis process is designed to allow retailers to break down complex demographic patterns into representative population subsectors. The categorization of the population, while generalized, is important because it is often the only picture a retailer will see of a potential market. The psychographic categories used in this analysis were created by a consumer information company called PRIZM. The PRIZM Lifestyle Segments categorize people by established patterns of variables such as race, education, job type, housing, etc. The resulting population cohort provides information

regarding typical behaviors of this segment of the population including family composition, leisure habits and retail spending tendencies.

In both the local neighborhood and the City of Green Bay the segments were fairly similar. They were weighted towards the younger and mature population groupings with very limited representation from the family life stage. The following categories represent the most predominate population groupings, collectively representing over 75 percent of neighborhood residents.

#### Younger Population Classifications:

The younger end of the population spectrum is made up of current and recent college graduates and is represented by the following demographic profiles:

- **Boomtown Singles:** Entry level employees in satellite cities. These individuals have active lifestyles, and frequent bars, convenience stores and Laundromats.
- **Up & Comers:** This group encompasses recent college graduates, largely representing middle income singles at the pre-marriage stage. This population is highly mobile and favors second tier cities. Habits include athletic activities and the latest technology.
- **City Startups –** Current college students fall into this category. Single with low incomes, this group often patronizes bars, cafes and Laundromats.

#### Family Stage Classifications:

The small percentage of families with children represented in the area is nearly evenly split between the following two groupings:

- **White Picket Fences:** Solidly middle class families married with children. Live in modest homes, with purchasing largely centered on the home and food eaten in.
- **Family Thrifts –** These families are younger than average and have more children than average. Parents work service jobs and tend to rent versus own. Most common purchases are baby and child goods, affordable cars and home goods.

#### Mature Population Classifications:

The population of empty nesters and seniors is the most diverse of the three sectors, including active empty nester couples as well as more sedentary older single individuals. The most common characterizations of this population are:

- Middleburg Managers – the largest single grouping in the trade area, this category represents 17 percent of residents. Typical residents include pre-retirees in satellite communities seeking a lower cost of living and more relaxed pace of life. The population is made up of middle class working individuals with comfortable near-term retirements. Hobbies include reading, music, gardening & crafts.
- Sunset City Blues – Typically found in older neighborhoods in small cities, this category encompasses lower middle class retirees or those nearing retirement. The population tends to be home owners with low-key lifestyle. Books, periodicals and family-style restaurants are favorites.
- Park Bench Seniors – This category accounts for the oldest demographic segment and includes retired singles in satellite cities. Most have a modest education & income and live largely sedentary lifestyles. Spending is centered on television and discount stores.

and housing choice, then projecting those demographics forward to determine the directions in which the housing environment will evolve. The goal is to identify housing products that will be needed as demographics and housing trends change in the future.

The housing data analysis examines numerous demographic variables:

- Population
- Households
- Household Size
- Families
- Median Household Income
- Income Distribution
- Age Distribution
- Race and Ethnicity
- Housing Type by Age and Tenure
- Senior Housing Supply and Demand

## HOUSING ANALYSIS

In order for the Corridor to be sustainable into the future, it will need to integrate other uses besides retail. One potential use is housing. The housing analysis, much like the retail analysis, focuses on identifying past trends in demographics

FIGURE 2.5: AVERAGE HOUSEHOLD SIZE, UNITED STATES

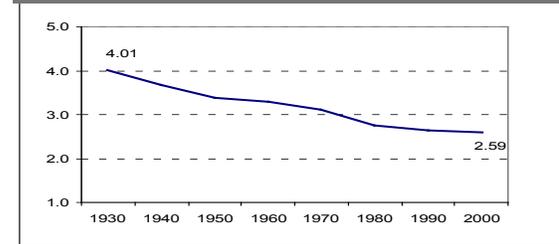


TABLE 2.11: GENERAL POPULATION ESTIMATES AND PROJECTIONS

	2000	2010	2015	2020
Population	102,313	99,893	99,634	99,375
Annual Change in Population		-0.2%	-0.1%	-0.1%
Households	41,591	41,767	42,028	42,291
Annual Change in Households		0.04%	0.1%	0.1%
Household Size	2.46	2.39	2.37	2.35
Annual Change in Household Size		-0.28%	-0.2%	-0.2%
Families	24,652	24,316	24,128	23,942
Percent of HH Comprised of Families	59%	58%	57%	57%
Annual Change in Families		-0.14%	-0.16%	-0.16%
Median Household Income	38,919	43,106	45,299	47,603
Annual Change in Median HH Income		1.03%	1.00%	1.00%

Source: Claritas, Wisconsin Department of Administration, Vierbicher



DRAFT

This section will provide an overview of the critical data trends and their impact on housing demand. In addition, a brief overview of some key national trends in housing will be provided. All of the information in this section represents data from the City of Green Bay. It should be noted that the demographic projections are not consistent with the projections made in the 2003 Smart Growth Plan. The difference is largely due to more recent trends in DOA spot population estimates that were obviously not known at the time of the Smart Growth Plan drafting, but were incorporated into the projection calculations in this document. The projections found in this section should be updated following the 2010 census. Each of the variables discussed below includes a section on the analysis results and the impact of those results on housing in Green Bay in general and Military Avenue specifically.

**General Population Estimates and Projections**

The most obvious variable for consideration is basic population and household data. Table 2.11 shows the historic, current and future estimates for population, households, household size, families and median household income.

Results

The City of Green Bay is projected to experience a decrease in population, but an increase in households because of falling household sizes (Figure 2.5 and Table 2.11). This means that, even as the population falls, more housing units will be required to serve the same number or a lesser number of residents because of fragmentation of the population into more households. The trend of falling household size is not unique to

Green Bay, but has actually been a national trend for most of the last 70 years. The current causes of falling household size are numerous, but chief among them is an aging population, delayed coupling and delayed child rearing.

It is also important to note that, although total percentage of families is not projected to change significantly, Green Bay's percentage is much lower than the state percentage. In 2000, Green Bay's households were comprised of 59 percent families, while the state is comprised of 66 percent families (note: in demographic terms families refers to any set of related individuals, not exclusively through marriage or by the presence of children).

**TABLE 2.13: CHANGE IN AGE COHORT**

	Change in Age 2000-2010	Change in Age 2010-2015
Age 15-24	-440	19
Age 25-34	-1,006	-1,044
Age 35-44	-1,082	-114
Age 45-54	972	-115
Age 55-59	1,172	485
Age 60-64	782	563
Age 65-69	186	475
Age 70-75	-110	220
Age 75+	-321	-100
TOTAL	153	389

Source: Claritas 2010, Vierbicher

**TABLE 2.12: HOUSEHOLDER AGE DISTRIBUTION**

	2000		2010		2015	
	Population	Percent Dist.	Population	Percent Dist.	Population	Percent Dist.
Age 15-24	3,531	8%	3,091	7%	3,110	7%
Age 25-34	8,733	21%	7,727	18%	6,683	16%
Age 35-44	9,602	23%	8,520	20%	8,406	20%
Age 45-54	7,507	18%	8,479	20%	8,364	20%
Age 55-59	2,378	6%	3,550	8%	4,035	10%
Age 60-64	1,975	5%	2,757	7%	3,320	8%
Age 65-69	1,819	4%	2,005	5%	2,480	6%
Age 70-75	1,739	4%	1,629	4%	1,849	4%
Age 75+	4,372	10%	4,051	10%	3,951	9%
TOTAL	41,656		41,809		42,198	

Source: Claritas 2010, Vierbicher

Impact

The conclusion drawn from the analysis of general population data is that overall growth is not significant in Green Bay. However, due to a variety of factors, most of which will be discussed below, there still will be pressure on the housing stock to evolve; not from population growth, but because of a change in make-up of City population. In addition, these results point to the importance of redevelopment and infill development if the goal is to increase customers and population within the Military Avenue Corridor. These sites represent an opportunity to offer new housing choices to retain local households and attract new ones by providing a mix of housing options targeted at these population groups.

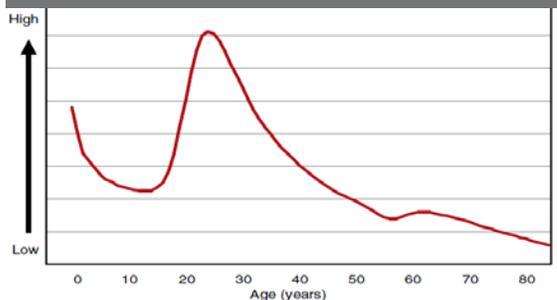
**Household Age Distribution**

The analysis of population age and distribution is important to future housing needs because different age cohorts have different generalized housing demands. For this study, the population age distribution projects the breakdown of the 2015 Green Bay population by nine age cohorts. Unlike the previous projection, the remainder only go through 2015 because of the increased complexity of the variables. When projecting a variable that contains multiple streams of data, the margin of error increases rapidly as the projections move out in time. Therefore the complex projections were capped at 2015 to avoid unnecessary error.

Results

As Tables 2.12 and 2.13 show, the City of Green Bay is projected to see a significant decline in the 25-34 cohort and an increase in the age cohorts from 55 to 69 between 2010 and 2015. This, like household size, is not a surprise given the demographic trends across the country. However, it is still important to the housing analysis for a variety of reasons.

**FIGURE 2.6: GENERAL MIGRATION TRENDS BY AGE (UNITED STATES)**



Source: USDA, Economic Research Service, using Pandit (1997a).

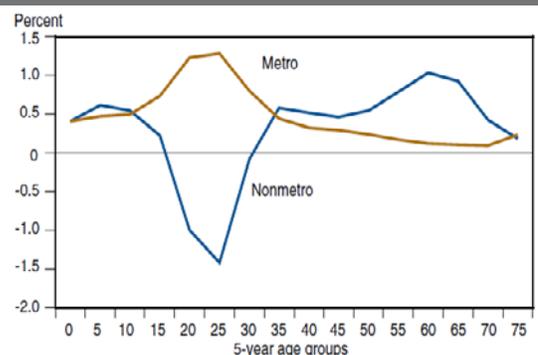
Impact

Age, in many instances, influences housing choices. For example, renting is the predominant housing choice in Green Bay until the age of 35. Therefore a reduction in that age cohort may impact demand for rental properties. Likewise, age is typically linked with income level and, therefore, housing affordability. These issues will be explored in later variables.

In addition, a recent study by the USDA, Economic Research Service showed that individuals between 18 and 25 years of age are very likely to change housing due to higher education opportunities and the beginning of careers. After the initial spike, as families are formed and children age, the likelihood of migration drops significantly, reaching its low point at around 55 years of age. The 55 to 60 age group again sees a slight increase in the likelihood of housing change. This trend is illustrated in Figure 2.6. Because many communities are currently seeing significant increases in the 55 and older population, including Green Bay, these trends become very important.

Figure 2.7 expands on the migration trends by including migration destinations: "metro" and "non-metro." This figure shows that migration to a metro area is very pronounced between the ages of about 20 and 25. The trends toward metro and non-metro migration then converge during the "family" years. At about age 53, there is a significant increase in migration toward non-metro areas which lasts until age 70. Because Green Bay is a metro area, these trends in migration could make it more difficult for the City to retain its aging population.

**FIGURE 2.7: METRO/NONMETRO MIGRATION TRENDS BY AGE- UNITED STATES**



Source: USDA, Economic Research Service, using data from USDA-funded cooperative agreements (Fuguitt and Beale, 1996; Voss et al., 2004).



TABLE 2.14: HOUSING TYPE BY AGE 2010 (PERCENT OF TOTAL CITY HOUSEHOLDS IN ITALICS)

	Owner Occupied													
	15 - 24		25 - 34		35 - 44		45 - 54		55 - 64		65 - 74		75+	
1, Detached or Attached	6%	(0.5%)	36%	(7.3%)	56%	(13%)	65%	(11%)	66%	(7%)	72%	(7%)	58%	(6.3%)
2 to 4	2%	(0.2%)	3%	(0.6%)	3%	(0.6%)	3%	(0.4%)	4%	(0.4%)	3%	(0.3%)	3%	(0.3%)
5 to 19	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	1%	(0.1%)
20 to 49	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)
50 or more	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)
Mobile home	1%	(0.1%)	1%	(0.2%)	1%	(0.2%)	0%	(0.1%)	1%	(0.1%)	1%	(0.1%)	1%	(0.1%)
Boat, RV, van, etc.	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)
TOTAL	9%	(0.8%)	40%	(8.1%)	60%	(14%)	68%	(12%)	70%	(8%)	77%	(7%)	62%	(7%)
	Renter Occupied													
	15 - 24		25 - 34		35 - 44		45 - 54		55 - 64		65 - 74		75+	
1, Detached or Attached	16%	(1%)	13%	(3%)	10%	(2%)	8%	(1%)	5%	(0.5%)	2%	(0.2%)	4%	(0.5%)
2 to 4	30%	(3%)	25%	(5%)	16%	(4%)	12%	(2%)	11%	(1%)	5%	(0.5%)	6%	(0.7%)
5 to 19	33%	(3%)	16%	(3%)	11%	(3%)	8%	(1%)	8%	(1%)	8%	(0.7%)	10%	(1%)
20 to 49	9%	(1%)	4%	(1%)	2%	(0.5%)	2%	(0.3%)	2%	(0.2%)	3%	(0.2%)	6%	(0.6%)
50 or more	2%	(0.2%)	1%	(0.2%)	1%	(0.3%)	2%	(0.3%)	3%	(0.3%)	5%	(0.5%)	11%	(1%)
Mobile home	1%	(0%)	0%	(0.1%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)
Boat, RV, van, etc.	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)	0%	(0%)
TOTAL	91%	(8%)	60%	(12%)	40%	(9%)	32%	(5%)	30%	(3%)	23%	(2%)	38%	(4%)
TOTAL AGES	100%	(8%)	100%	(20%)	100%	(23%)	100%	(17%)	100%	(11%)	100%	(9%)	100%	(11%)

TABLE 2.15: AGE COHORT BY INCOME: CHANGE BETWEEN 2010 AND 2015

	Age 15 - 24	Age 25 - 34	Age 35 - 44	Age 45 - 54	Age 55 - 59	Age 60 - 64	Age 65 - 69	Age 70 - 74	Age 75+	Total Households in Income Bracket
< \$15,000	-44	-118	-91	-65	36	51	65	21	-175	-320
\$15,000 - \$24,999	-41	-179	-66	-45	28	54	55	21	-51	-224
\$25,000 - \$29,999	-19	-96	-78	-11	10	33	20	9	12	-120
\$30,000 - \$34,999	-60	-115	-20	-74	23	41	30	23	12	-140
\$35,000 - \$39,999	45	-45	-46	-11	-24	-5	12	-1	18	-57
\$40,000 - \$44,999	-8	-108	-48	-20	7	14	55	34	46	-28
\$45,000 - \$49,999	42	-89	-87	-69	26	28	19	9	9	-112
\$50,000 - \$59,999	-10	-119	-54	-33	84	59	40	18	-33	-48
\$60,000 - \$74,999	40	-166	59	-25	50	71	41	10	12	92
\$75,000 - \$99,999	52	-36	72	45	68	81	80	21	25	409
\$100,000 - \$149,900	6	55	155	119	103	88	28	16	0	571
\$150,000 - \$199,999	8	-16	31	31	7	6	20	13	12	112
\$200,000 - \$249,999	2	1	27	12	2	7	5	4	5	65
\$250,000 or more	0	-3	7	16	15	21	4	0	3	63
Total Households in Age Cohort	13	-1,035	-139	-130	436	550	475	198	-105	261

Source: Claritas 2010, Vierbicher



**Housing Type by Age**

Housing type describes the physical structure of a housing unit and the tenure of its residents. For example, single-family detached, condominium in a six-unit building, and apartment in a 75-unit building are all different housing types. Table 2.14 shows all of the different housing types by age and by tenure (renting versus owning) from the 2000 census. The first percentage in each column is the distribution within the age cohort, and the percentage in parentheses is the distribution of the entire population. For example, in the first column and first row, six percent of the 15-24 age cohort are living in owner-occupied single-family homes; but, only 0.5 percent of all households in the City are 15-24 and reside in owner occupied in single-family homes.

Results

As mentioned above, this analysis provides insight into how future changes in population will impact housing choice. Historically, rental housing is the most common housing choice for households up to the age of 34. There is also a fairly significant shift back to rental units after the age of 75, although the types of rental units desired by each age cohort are significantly different. In addition, the data seems to suggest that the likelihood of renters living in larger apartment complexes decreases with age; however, this may also be simply a result of supply constraints.

Impact

If these trends continue through 2015, given the estimates and projected change in age, there would be a demand for over 600 new owner-occupied units and actually a 250-unit reduction

in rental demand. However, there are likely going to be changes in housing choice apart from historic trends that will impact these results. These issues will be explored in more detail in the following sections.

**Household Income and Housing Affordability**

In addition to age, household income obviously has a significant impact on housing choice. The housing analysis used historic and estimated changes in age and household income to project how income brackets will change by age cohort between 2010 and 2015. Table 2.15 shows the results of the household income analysis. It should be noted that the total change in households for each cohort does not exactly match the changes presented previously because of the difference between complete and sample data sets used by the US census.

Results

Table 2.15 shows that although overall change is negative between the ages of 35 and 54, there is a significant increase in the households with incomes of \$100,000 - \$149,000. Within the age cohorts that are projected to increase significantly (55-69), the change is more spread out across income brackets, but still largely above \$50,000 per year.

**Race and Ethnicity**

It should be no surprise that Green Bay, like most urban areas, is evolving quickly in terms of race and ethnicity. Table 2.16 illustrates the changes that occurred between 1990 and 2000. Although trends between 1990 and 2000 were accompanied by an increasing population (in contrast with the decreasing population that is

TABLE 2.16: CHANGE IN RACE AND ETHNICITY

	1990 Total	1990 Dist	2000 Total	2000 Dist	Percent Change in Total	Percent Change in Distribution
White alone	90,417	93.7%	85,134	83.2%	-6%	-11%
Black or African American alone	437	0.5%	1,358	1.3%	211%	193%
American Indian and Alaska Native alone	2,305	2.4%	3,075	3.0%	33%	26%
Asian or Native Hawaiian and Other Pacific Islander alone	2,215	2.3%	3,859	3.8%	74%	64%
Some other race alone	29	0.0%	47	0.0%	62%	53%
Population of two or more races:	n/a		1,546	1.5%		
Hispanic or Latino	1,063	1.1%	7,294	7.1%	586%	547%
Total	96,466	100%		100%	6%	0%

Source: Claritas 2010, Vierbicher



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projected moving forward), the change in racial diversity was dramatic. If those trends were to continue unchanged by 2015, Hispanic or Latino residents would account for over 50% of the population. Given real world limitations on population growth, new housing opportunities and population turnover, that scenario will not play out. However, it serves to illustrate the significance of recent and continuing racial change.

**Impact**

This change in population composition is important to future housing needs because housing studies<sup>1</sup>, have shown that many minority segments make different housing choices than the non-Hispanic white only segment. For example, most minority segments, particularly Native American and Alaska Native, Two or More Races, and Hispanic and Latino, have significantly higher average household sizes than White Alone segments. In addition, minority households are rapidly becoming better represented in home ownership. The resultant implication is that larger minority families are likely to occupy the traditional family housing present in older urban communities. These issues will be explored in more detail in the national housing trends discussion.

**Senior Housing**

The senior population segment (individuals age 65 and over) is handled separately here, because it is rapidly growing and has specific and predictable housing demands. To understand the senior housing population, Wisconsin Department of Health Services (DHS) data were used to calculate the number of beds <sup>1</sup>Riche, M. F. (2003) *Issue Papers on Demographic Trends Important to Housing*. Prepared for the U.S. Department of Housing and Urban Development, February 2003.

in each of the three senior housing categories: nursing care, Community Based Residential Facilities (CBRF) and Residential Care Apartment Complexes (RCAC). Both CBRF and RCAC are types of assisted living. Each of those categories is explained below.

**1. Nursing Care Facilities**

A place where five or more persons who are not related to the operator or administrator reside, receive care or treatment and, because of their mental or physical condition, require access to 24-hour nursing services.

**2. Community Based Residential Facility (CBRF)**

A community based residential facility is a type of assisted living facility where five or more adults reside who are not related to the operator or administrator, who do not require care above intermediate level nursing care, and who receive care, treatment or services that are above the level of room and board, but includes no more than three hours of nursing care per week per resident.

**3. Residential Care Apartment Complexes (RCAC)**

A residential care apartment complex is also a type of assisted living facility. An RCAC is defined as a place where five or more adults reside. Apartments must each have a lockable entrance and exit; a kitchen, including a stove (or microwave oven); and individual bathroom, sleeping and living areas. An RCAC offers support services (transportation, activities, etc.), personal services (eating, dressing, etc.) and nursing services at a level of no more than 28 hours per week. They can also offer 24-hour emergency services. RCACs do not include 55+ apartment developments.

TABLE 2.17: SENIOR HOUSING ANALYSIS

	Nursing Care		CBRF		RCAC	
	No. of Beds	No. of Facilities (Range in Size)	No. of Beds	No. of Facilities (Range in Size)	No. of Beds	No. of Facilities (Range in Size)
Total	1427	16 (32-153)	1052	50 (5-120)	376	7 (20-126)
Beds per 1,000 Households ages 65+	186		137		49	
Percent of Total Beds	50%		37%		13%	
Number of New Households 65+ in 2015	568					
Number of New Beds Demanded	105		78		28	

Source: Claritas 2010, Vierbicher

**Results**

Using the DHS data, the total number of beds per 1,000 households age 65+ was calculated and used to project new housing needs based on population change. If existing senior housing vacancies remained constant, by 2015 Green Bay's population would demand an additional 105 nursing care beds, 78 CBRF beds and 28 RCAC beds. Evidence suggests that the existing supply is over concentrated on the east side of the City, leaving an even larger need on the west side.

**National Housing Trends**

Housing trend information provides additional insight into the likely evolution of the local housing environment. Although not all of the national data can be directly related to Green Bay, it is nonetheless an informative "big picture" look at the likely changes facing housing in the United States, and can help Green Bay anticipate and prepare for changes that will impact future housing demand.

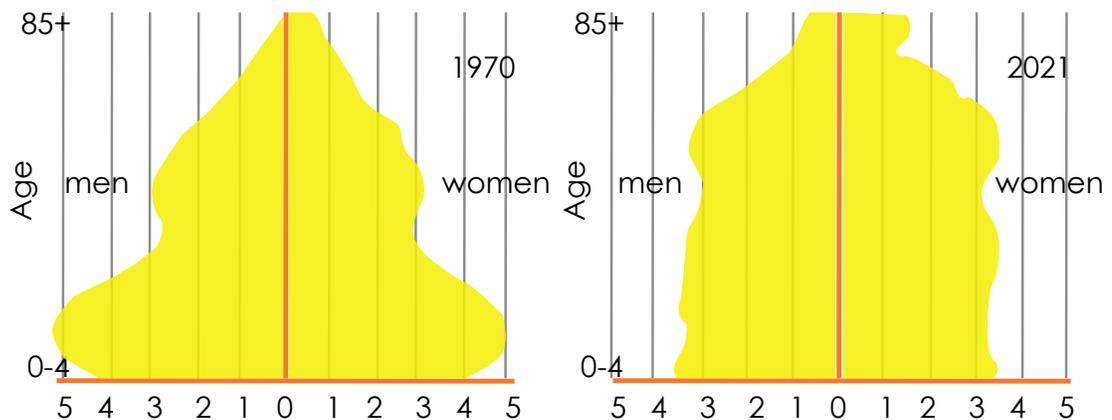
Nationally, the trends affecting the housing industry have garnered attention from numerous academic and governmental bodies. This is primarily because the fundamental demographic make-up of the country is undergoing a substantial change, and the manner in which housing decisions are being made is being influenced by that shift. To better understand this change and to help determine its impact on the City of Green Bay, a collection of national and regional housing studies were reviewed. The following is a synthesis of pertinent material.

The primary area of interest is the analysis of the changing demographic landscape and its impact on the housing market. Three elements in particular have ramifications on housing choices: the change in age structure, the change in income distribution, and the increase in minorities and minority families<sup>2</sup>.

It is no secret that America is getting older. Although this is technically accurate, and housing must reflect the needs of the aging population, the more long-term demographic shift is toward three roughly equal age cohorts (Figure 2.8). Historically, the American age distribution was pyramidal in shape, the largest cohort, by far, being ages 25-44, followed by 45-64, and the smallest being 65 and over. By the year 2025, it is anticipated that these three age cohorts will be approximately equal. Although the initial leveling out will be largely due to the aging baby boomer population, the trend is expected to endure even after the boomer generation due to increased life expectancy. As the older population segments increase in number, there are more households without children which reduces the overall household size. In addition, married couples are waiting longer before having children (or not having children at all). These trends have led to married couples without children being the most common household type in the US, and single-person households being the second most common. This is an important change in

<sup>2</sup> Riche, M. F. (2003) *Issue Papers on Demographic Trends Important to Housing*. Prepared for the U.S. Department of Housing and Urban Development, February 2003.

**FIGURE 2.8: PROJECTED CHANGE IN AGE DISTRIBUTION**



Sources: US Census Bureau, US Department of Housing and Urban Development

relation to housing stock because so much of existing housing in older cities like Green Bay is geared toward traditional family structures, and the historic target market of white, family households is becoming less prevalent in those same communities.

A second element important to the aging of America is the current and anticipated income distribution. Data show that income inequality is most pronounced in households over the age of 55. This means that, as new housing options are considered for the aging population, the mix of price points as well as rentals versus ownership opportunities will be important.

In addition, the aging population has given rise to more multi-generational households. It is becoming increasingly common for children to move in with their parents, or for parents to move in with their children for care giving. When this occurs, there is often the desire to retain a level of privacy for the aging individual. Therefore, it is not uncommon for homes to be modified to include a second entrance, bath or kitchenette.

A shift just as pronounced as the one occurring in age is the significant increase in minorities in virtually every location around the country. This shift is very important to housing decisions for a few reasons. First, minorities are considerably younger than non-Hispanic white individuals. In 2000 the median age of non-Hispanic white persons was 38.5 compared to 26.6 for Hispanic individuals, 28.5 for American Indians, 30.5 for African Americans, and 32.3 for Asians. As a result of this difference in age, there are more minority households than non-Hispanic white households in the family forming stage. In fact, by 2025, it is expected that only 25 percent of non-Hispanic white households will have children compared to 43 percent of Hispanic households, 36 percent of Asian households, and 30 percent of African American households. In short, traditional family structures are no longer the dominant reality of the majority of non-Hispanic white households. Instead, minority households represent the best opportunity for growth in the family cohort.

### **Population Drivers of Housing Trends**

Based on the population changes and trends outlined in the housing analysis section some key long-term housing needs arise. The following housing products will likely need to be supplied somewhere within the City of Green Bay in order to meet the needs of the evolving population. Not all of the housing products may be appropriate for Military Avenue, but an

understanding of general potential is required in order to target future Corridor opportunities in the following chapter.

#### Senior Housing

The growing senior population will require additional beds in all types of senior living facilities (assisted living and nursing home). In addition, 55+ apartment complexes also likely possess future potential in order to cater to individuals who may want to downsize their housing unit and change their environment without sacrificing personal autonomy.

#### Rental Housing

Although the data does not show a future increase in the 25-34 age cohort, the group most likely to rent, other factors make this housing product needed in the future. The biggest factor in the need for rental properties is the quality of existing stock. Although raw numbers don't reveal the gap, Green Bay realtors suggest that quality units with modern amenities are in demand because of lack of available supply. This supply gap includes traditional apartment units as well as townhome style rental properties. In addition, the young-professional segment is willing to rent attractive units because of their mobility and uncertainty in length of time they will stay in any given City.

#### New Family Oriented Single-Family Housing

A large part of the Green Bay Population is moving into the family forming years. Historically many of the people in those segments have left the City of Green Bay for surrounding suburbs. With the recent spike in fuel costs, and the likelihood that fuel costs will increase again, and the trend in families choosing housing near schools, work and retail options, there is some push in the young-family sector back towards urban areas. However, in order to increase the number of families willing to stay in the City housing that can compete with the supply available in suburbs must be made available within the City limits. This can be accomplished either through the provision of new housing construction on the edge of the City, or through re-investment and updating of existing housing stock to create options meeting the space utilization needs of current buyers.

### Unique Owner Occupied Housing Options

In addition to traditional single-family housing, both the demographic analysis and the insight provided by Green Bay realtors points to the potential to develop new owner occupied housing on infill locations that provide a unique product offering to the City. Housing in this category may take the form of row houses integrated into retail and entertainment areas, or townhomes on the edges of established single-family neighborhoods. In addition, these types of housing can target underserved populations that demand special amenities. For example, as discussed in the national housing trends, within non-white segments there is a high likelihood aging extended family will live with their children and their children's family. Those segments could benefit from new housing that provides a semi-private second entrance or somewhat separated living area.

## OFFICE ANALYSIS

The office analysis considers three types of office space: business-to-business, service business and medical.

### Business-to-Business

Companies that fall into the business-to-business category are those that provide professional services to other professional firms. For example, architects, engineers and certified public accountants represent typical business-to-business providers. Typically business-to-business firms locate in office buildings and do not demand the same level of visibility and traffic as retailers.

### Service Business

Service businesses could also be labeled as business-to-consumer. These businesses provide services directly to consumers, e.g., tax preparers and insurance agents. These businesses typically demand a high level of visibility and traffic, and will locate alongside retailers or in office space depending on cost and availability.

### Medical Office

Medical users experience a combination of the drivers for business to business and service businesses. They often desire clustered locations with other service providers such as specialists or complementary uses (i.e. chiropractic) yet also benefit from a street presence and easy client

access and visibility. Medical office tenants also require more extensive space buildout than other office tenants and need properties that can accommodate the additional power, loading and parking requirements specific to medical uses.

### **Office Market Analysis**

Analyzing the office market for micromarkets within tertiary markets is difficult given the limited office product available and varying age and type of product (i.e. retail/office versus traditional or medical). In this type of market anecdotal information from real estate professionals in the market is equally if not more important than quantitative data. However, this report attempts to capture all available qualitative and quantitative data.

### Business – to – Business Office

The business-to-business office market in Green Bay consists mainly of Class B space. Some Class A space does exist, but it is limited to a few buildings. The typical definition of each class is as follows:

Class A space is found in newer buildings, or historic/landmark structures which are well located, and offers efficient or customizable tenant space with modern mechanicals. Class A space also offers high quality finishes and usually can demand higher rents because of amenities and prestige. Class A buildings should transition to Class B as they age and the amenities and finishes become obsolete due to new or changing product demands.

Class B space is less attractive to tenants and sometimes must rely on lower rents to attract users. Class B space is generally comprised of older, utilitarian space with average mechanicals and average management. These buildings are often deficient in at least one major category, including floor plans, conditions, amenities and/or facilities.

Class C space is comprised of basic, older structures which offer below average maintenance, management and finishes. These buildings must rely solely on low rents because they offer no prestige to tenants.

As a result of the current economic situation, office activity nationally is extremely depressed. There are some pockets of activity, including owner-user purchases with SBA financing, and leasing by firms with near term expirations and stable businesses hoping to capitalize on current low rates. Historic market data for the Green



Bay market as a whole provided by Grubb and Ellis shows that overall vacancy in Green Bay has declined from 20 percent in the third quarter of 2006 to about 12 percent in the first quarter of 2009. A vacancy rate of 10 percent is traditionally considered to be 'equilibrium' and vacancies below that point to a likely demand gap for some types of office product.

The Green Bay office market provides Class B space at approximately \$14.00 per square foot annually gross or about \$10.00 triple net. The few Class A spaces lease for around \$14.25 per square foot triple net. According to local brokers, there are not any gaps in the existing supply of office space. In other words, potential tenants are able to find the type of space they demand for a price they are willing to pay.

A survey of space currently marketed as available for office tenants in the district includes a large amount of first-floor space that is unsuitable for retail due to lack of street visibility, or lack of window display space. Spaces are small, with the majority under 3,000 square feet and one-quarter less than 1,000 square feet, although three spaces are in the 6,000-7,000 square foot range. Asking rental rates are in line with the \$8-\$10 full service annually reported by office tenants responding to the existing business survey.

Based strictly on rental rate structures, landlords would prefer to lease to retail tenants as rates for this type of use are higher than office rents in the same property. This pushes office uses to the less desirable square footage. Additionally, there is a negligible difference in asking rents between renovated and unrenovated office properties in the corridor, providing little incentive for landlords to make significant investments in older office properties. Similarly, rents in the neighborhood are on average \$5 less than rents for many of the more traditional office destinations in the City, making it less attractive for new development. Therefore, it should be an objective of implementing this plan that increased rental rates are experienced over time, especially in renovated locations.

#### Business-to-Business

The Military Avenue Corridor currently does not factor into the business-to-business landscape because it lacks space that caters to those businesses. The traditional office properties that do exist in the neighborhood such as Continental Plaza (Fisk & 6th) and the Commerce Building

(South of Mason & Fisk) have historically had high occupancy rates according to area real estate professionals, and are home to a variety of industry sectors including education, business to business service providers, accountants, therapists, non-profits and insurance agents. These traditional office users that choose to locate in the Corridor are typically those that do not require a specific image location and could locate anywhere within the City. There is no significant driver bringing them to existing space aside from suitable availability, convenient location to place of residence for owners or employees, or a location convenient to major clients or vendors. While this makes it a difficult population to target with specific marketing, it also represents one of the largest components of office tenants in a city. These industries do benefit from clustering, so a survey of vendors or clients of existing businesses, including those in the Packerland Industrial Park, could result in a targeted marketing campaign to attract ancillary office uses.

#### Service Business

Service businesses typically locate in storefront space that would be appropriate for either office or retail. Service businesses currently located in the Military Avenue Corridor for the most part are located within retail strip centers and other commercial space that serves both service businesses and retailers. That space in the Corridor leases for between \$8.00 and \$10.00 per square foot annually full service, with some well below that level. These lease rates make the Corridor one of the most affordable locations for service office in the City. Although vacancy rates along the Corridor have been increasing, the increase is largely due to retail turnover, not the loss of service office space.

Service businesses typically draw their customer base from the same market as the local retailers. For example, people often bank near to the location they live or a frequented retail destination. Because of how closely linked the retail and service business environments are, the health of the service business sector follows, and is somewhat dependent on, the health of the retail market. For those reasons future opportunities in the service business sector will be determined by how retail and housing develop in the Corridor. In particular, just like the retail sector the most important element for the future of service businesses in the Corridor is the ability to attract and increase the customer base.

Later in this document as the future vision and opportunities are outlined they will consider how those opportunities will entice or deter certain service businesses.

Medical Office

Medical office users are the one office group most concentrated in and around the Corridor, most notably in properties closer to the intersection of Shawano and Military. These tenants will seek out spaces in the corridor, as providers affiliated with St. Mary's demand proximity and other healthcare providers serving the west side desire to be near the only west-side hospital facility for convenience.

As compared to traditional office space, the medical office market is significantly tighter in the Corridor. With a lack of recent office construction, medical tenants are unlikely to relocate unless the business model demands a shift in space size. Medical tenants often pay more in rent than traditional office tenants, although the initial buildout of medical tenant space costs more to a landlord up front given the higher electrical, plumbing and hard wall buildout required for patient rooms and related medical equipment operation.

**SUMMARY & KEY OBSERVATIONS**

The overall assessment of commercial and residential markets provides a point in time analysis of the corridor in relation to its competition in the City and the region. The analysis also attempts to carry forward the existing trends to take a glimpse at the Corridor's future assuming the continuation of current patterns. Based on this comprehensive analysis, the Corridor possesses a number of advantages and opportunities to advance its position and capitalize on unmet or future market demands. Below are some of the key opportunities deemed most feasible within the Corridor.

Observation 1: Changing demographics mean future demand for nursing care, assisted living & 55+ senior housing.

The aging population in the surrounding neighborhoods (as well as nationally) and general lack of senior housing west of the Fox River demonstrates a clear demand for additional living arrangements tailored to seniors. Past private market interest validates this demand. To maximize the potential for success, sites should be identified adjacent to retail nodes to provide a built in customer market and promote pedestrian activity. It should also be noted that a significant population of mature residents already within the neighborhood fell into the psychographic subset of empty nesters that choose to retire to satellite cities for a lower cost of living and more relaxed lifestyle. There may be an additional opportunity to target these individuals from population hubs in southern Wisconsin or even Chicago as they reach an age of retirement planning.

**TABLE 2.18: EMPLOYEES BY INDUSTRY SECTOR**

Industry Sector (Office Uses)	Average M.A. Employees Per Business	Average Business Size (SF)
<b>Business-to-Business</b>	<b>200 SF/Emp</b>	
Accounting	4	800
Finance	8	1,600
Manufacturing/Construction Service	6	1,200
Printing/Publishing	6	1,200
Real Estate	5	1,000
<b>Service Business</b>	<b>150 SF/Emp</b>	
Personal Services	5	750
Professional Services	5	750
Education (non-school)	7	1,050
<b>Medical</b>	<b>300 SF/Emp</b>	
Healthcare	8	2,400

Source: OneSource, Vierbicher

Observation 2: The upcoming period of demographic transitions in the neighborhood provides a unique opportunity to attract younger residents.

Based on the psychographic data the City appears to be at a transition point for housing choices. As the existing mature population gradually moves on to new housing options, the existing housing stock will be placed on the market. This period of transition is critical for post-war neighborhoods, and can result in a gradual influx of younger households and families. However, if the re-sale market proves resistant, the transition can also move in the direction of renter-occupied homes. The arrival of younger and especially family households is appealing to retailers, and every effort should be made to entice these groups. While existing housing geared toward traditional families might not be immediately attractive to these groups, there are simple strategies to entice younger buyers into the area.

Observation 3: National anchor attraction can provide a catalyst for the neighborhood.

Both the focus groups and stakeholder interviews identified a desire for additional national-caliber retail in the Corridor. The Military/Mason intersection is the prime candidate within the district for national retail recruitment. This node provides central access to the trade area and is the only intersection with sufficient vehicular traffic to meet national retailer siting criteria. Additionally, the availability of an existing large parcel and single ownership would allow this site to be developed in the short term. Any ability to assemble additional parcels would enhance the existing opportunity, providing for co-tenancy and catering to the larger footprint of today's retailers. The larger site would also allow for ancillary pad development necessary for restaurant and service providers identified as desirable by the focus groups.

Observation 4: Medical office development is a likely outgrowth of prevailing trends.

The existing strength of the St. Mary's hospital compounded by the planned expansion comes at an opportune time for the corridor. It is largely anticipated that the recently passed healthcare reform legislation and the aging baby boom will result in a reduction in office uses located within the hospital itself. The increased focus on medical efficiencies will make space within the hospital too valuable for this use, pushing some administrative functions into nearby office properties. Additional hospital-related uses such as staff apartment housing, hotel and restaurant facilities would also benefit from this adjacency, providing an opportunity for mixed-use development in the Corridor.

Observation 5: Specialty retail clustering provides a way to target unmet demand.

Both the retail demand analysis and customer makeup of existing businesses points to the desirability among the neighborhood and greater trade area for specialty retail. Typically smaller in nature, these retail entities benefit to the greatest degree from clustering. Currently, Military Avenue lacks a pedestrian-friendly 'shopping experience'. Potential long-term locations for such nodes would be the existing Green Bay Plaza with a redesigned parking area, or the Ninth Street area as enhanced with pedestrian improvements. A subarea master plan for the area could encourage future main-street style development of small to mid-sized storefronts for retail and professional service firms in the area. This node would balance out the Military/Mason intersection and also provide a variety of retail environments in the district to better capture identified supply gaps in the market. Additionally, the provision of new space options could encourage many of the existing businesses to upgrade space while also providing impetus for existing properties to renovate or provide façade upgrades in order to remain competitive.



## VISION & ECONOMIC POSITION

### VISION STATEMENT

It is the year 2025, and the revitalization plan for Military Avenue has been successfully implemented....

Military Avenue is a **signature street** in the City of Green Bay. Its revitalization has given the corridor a **unique identity** within the city and the entire metropolitan area. Like the City of Green Bay itself, Military Avenue's scale is uniquely "mid-sized"... large enough to be convenient for auto-oriented trips and large, national businesses, but small enough to include elements that are pedestrian, bicycle, and neighborhood friendly. It offers the best of both worlds.



Some businesses have left the corridor, but vacant properties have been filled and a new vibrancy has added a vital level of density helping **existing and new businesses to prosper**. Business growth has been catalyzed by a new national retailer at the intersection of Military and Mason. This **anchor development** has attracted several other new businesses that have taken advantage of available market niches. New and existing specialty shops continue to serve the needs of the surrounding residential neighborhoods and attract additional visitors from the surrounding region.



Military Avenue's unique identity is proudly displayed with **gateway markers** at Lombardi Avenue, Velp Avenue, Mason Street, and Shawano Avenue. The additional traffic directed to Military Avenue during the reconstruction of USH 41 exposed new customers to the offerings of the business district. Both the new gateways and the additional exposure have been leveraged to create a sustained level of customer traffic that has **increased the demand** for real estate on Military Avenue.



Shoppers come to Military Avenue because it offers a unique experience in a **visually pleasing and functional** setting. Building façade improvements, parking area improvements, and new construction have utilized attractive architecture and quality building materials. Businesses and parking areas include abundant green space and landscaping. Well lighted walkways and business entrances have helped to establish continued retail activity into the evening hours and throughout all the seasons.



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Visitors to Military Avenue arrive via **multiple modes of transportation**. There are areas where people are able to park their vehicle and walk to several destinations. Transit service to the district has been improved by creating a single route that links major retail and entertainment destinations in the metropolitan area. This route allows shoppers and tourists to conveniently reach Lambeau field, Bay Park Square, Downtown Green Bay, Military Avenue and the like.



The mix of new development along the corridor includes **office and residential uses** as well. High quality senior housing has filled a much needed gap for the aging segment of the community on Green Bay's west side. Attractively designed town homes are located in mixed use areas and provide an improved transition between intensive business areas and established single-family neighborhoods.



Military Avenue **visitors stay in the corridor** for several purposes, as they are able to shop, visit service providers, and eat at one of the corridor's many restaurants. Local neighborhood residents and regional visitors alike can enjoy a stop at the ice cream shop before they head home.



(c) Tim Gorichanaz

The Lombardi Avenue gateway is integrated with and complementary to the development being facilitated by the **Green Bay Packers**, which helps to draw additional traffic onto Military Avenue. The south end of Military Avenue has been updated with an urban cross-section, sidewalks and a pedestrian bridge connecting the north and south sides of Lombardi Avenue. Additional space for commercial development has been made available, and careful buffering of residential neighborhoods is being provided.



The new **public plaza** is used to host community events and a weekly farmers market. It has added an attractive green space and "town center" to the corridor. People gather there just to relax and view the public art or even divert their trips between businesses to include a walk through the plaza.

## ECONOMIC POSITION OF THE CORRIDOR

Traditionally, Military Avenue has been a commercial street, largely devoted to regional retail establishments, defined as retailers able to draw consumers from a broader regional trade area. However, as discussed in the context analysis, the competitive advantages Military Avenue as a vital north-south transportation route have diminished considerably since construction of USH 41. Steady traffic levels have changed considerably, and some segments of Military Avenue are no longer as viable for retail establishments that cater primarily to vehicular traffic. This plan responds to that change by designating several Military Avenue sub-districts. Higher amounts of traffic exist on cross streets and key intersections with Mason Street, Shawano Avenue, and Lombardi Avenue. On the other hand, in-fill development has brought a large number of residents, workers and spending power to the immediate area, creating new opportunities for less-traveled stretches of Military Avenue. The market analysis and stakeholder input gathered throughout the planning process show Military Avenue as a market with much untapped potential.

Strengthening the economic position of the corridor requires recognition that Military Avenue will continue to evolve from a relatively homogeneous suburban transportation connection to an urban corridor that travels through diverse districts and neighborhoods. The Military Avenue corridor planning area was broken down into several sub-districts as part of the planning process. Over time, development of sub-districts could allow the corridor to reach new markets, strengthen visual interest, and encourage more business clustering and multiple-stop trips by customers. Map 3.1 shows the configuration of recommended sub-districts for the corridor.



### Sub-District #1: Regional Retail

The regional retail sub-district is designed to facilitate retail expansion along the most heavily traveled portion of Military Avenue, surrounding the area from Shawano Avenue to 6th Street. The regional retail concept capitalizes on the presence of existing high-traffic intersections and seeks to centralize large format national retail activity where it will be most successful. Buildings will largely be single-story and retail oriented. This sub-district's emphasis is on creating a vibrant retail corridor with numerous retail destinations. These entities will have shared access and a consistent and visible street presence. The regional retail sub-district concept stems from an effort to capitalize on the historic success of retail tenants on Military Avenue. Retailers are most successful when shoppers are able to coordinate multiple trips in one destination. New development in this area will include a mix of local and national chain retailers with coordinated design elements and will provide pedestrian connections to multiple stores. While the bulk of new development will be single story retail, two story properties with second floor commercial space may be integrated.



### **Sub-District #2: Neighborhood Oriented Mixed-Use**

There are two neighborhood mixed-use districts identified along Military Avenue. They are located on both ends of the regional retail sub-district and extending south to Langlade Avenue and north to Bond Street as shown on Map 3.1. These districts will focus on careful neighborhood integration and creation of a pedestrian oriented environment. Higher architectural standards and streetscape amenities will provide an improved transition to the neighboring residential area and enhance the destination shopping experience. Construction within this district will be mixed-use, multi-story buildings which should include small office, service and retail spaces. Developers are encouraged to construct residential units in second floor or rear lot locations. These neighborhood nodes are also the preferred location for new or expanded community or public facilities. Redevelopment of these key areas provides an opportunity to create defined pedestrian-friendly commercial nodes through construction of properly-scaled buildings, associated amenities and a business mix that serves adjacent neighborhoods. Retro-fits to existing commercial properties in this sub-district, such as marking pedestrian connections, constructing building façade improvements, installing landscaping and lighting enhancements and the like, are also encouraged.

### **Sub-District #3: Office/Hospital Campus**

The office and medical district is designed to leverage the potential of the existing St. Mary's hospital and help ensure the hospital's continued success. Given the anticipated growth in medical office demand based on shifting industry and demographic trends, the provision of land suited to medical office and outpatient development will be well received by the development community. Additional ancillary uses include retail and personal services

catering to hospital workers and visitors. The character of the district is a medium density traditional office and mixed-use area with two to four story buildings fronting onto Shawano Avenue. Emphasis should be given to the provision of bicycle and pedestrian amenities to encourage connections with Military Avenue. Development of specialty housing for seniors (including independent and assisted living as well as nursing care) is encouraged within this district. Siting for these properties should consider non-vehicular access to medical and shopping amenities. Senior housing development can provide an excellent transition between adjacent single family neighborhoods and the more heavily trafficked Shawano Avenue.



### **Sub-District #4 Residential Infill/Transition**

Sub area number four is actually a number of sites that have been identified as appropriate for residential infill development. Residential development in these locations can reduce existing conflict in uses resulting from the presence of higher density commercial uses located immediately adjacent to single family neighborhoods. In addition to acting as a more desirable neighbor for residents, this higher density housing is an opportunity to provide additional housing options not currently supplied along the corridor. The increased density of development also provides potential for a significant boost in spending power within the primary trade area.

### **Sub-District #5: Local Business**

The northern-most stretch of Military Avenue has a long history of local business tenancy. The Local Business District will ensure that these businesses remain profitable by limiting conflicting uses such as residential units immediately adjacent to commercial activity. Site design recommendations also stress circulation improvements such as siting of loading and parking components which will provide convenient service and client access.

Tenancy is anticipated to include largely manufacturing and warehousing or R&D/flex uses. Desired development types include one or two story buildings with a continuous landscape treatment. Loading and service access should remain in the rear of properties where possible.

This district also serves as an important linkage between traffic on Velp Avenue and the core of the Military Avenue commercial district. As such, consistent right-of-way streetscape and aesthetics leading into the district are important.



#### **Sub-District #6: Lombardi Gateway**

The Lombardi Gateway sub-district represents a unique opportunity to brand the corridor to the larger marketplace. Currently, the intersection provides no sense of place for the corridor and does not encourage Lambeau Field customers/fans to visit Military Avenue. Additional pedestrian and vehicular amenities and an entrance feature will make Military Avenue more inviting to Lambeau Field customers who might not otherwise venture north on Military Avenue. This node is dedicated to high-density development on parcels fronting Lombardi Avenue and adjacent to the triangular gateway intersection. It should include a mix of uses, with commercial on Lombardi to complement adjacent planned developments, and higher density residential fronting Military Avenue itself. The small district size, coupled with its prominent location, will allow the area to convey a brand message for the entire Military Avenue corridor. This node demands the highest level of recommended right of way improvements, including gateway signage and landscaping elements.

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**Map 3.1: Planning Area Sub-Districts**

- |   |   |   |  |
|---|---|---|--|
| <p><b>Regional Retail</b></p> <ul style="list-style-type: none"> <li>- Highest traffic volume</li> <li>- Limit residential</li> <li>- Multi-story buildings with office above are acceptable</li> </ul> | <p><b>Neighborhood-Oriented Mixed Use</b></p> <ul style="list-style-type: none"> <li>- Minimal setbacks</li> <li>- Specialty retail &amp; service office</li> <li>- Encourage mixed-use</li> <li>- Residential above or behind commercial ok</li> <li>- Community facilities</li> </ul> | <p><b>Lombardi Gateway</b></p> <ul style="list-style-type: none"> <li>- Opportunity to market and brand Military Avenue with signage/public art/landscaping</li> <li>- Improve route into commercial area with redevelopment and streetscaping</li> </ul> | <p><b>Residential Infill/Transition</b></p> <ul style="list-style-type: none"> <li>- Ideal location for senior housing, townhomes, multifamily buildings</li> <li>- Transition between commercial and single family residential</li> </ul> |
| <p><b>Local Business</b></p> <ul style="list-style-type: none"> <li>- Light manufacturing, service &amp; retail business</li> <li>- No residential</li> </ul>   | <p><b>Office/Hospital Campus</b></p> <ul style="list-style-type: none"> <li>- Clinics, Office, Senior Housing</li> </ul>  |   |  |

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# IV

## GOALS & OBJECTIVES

### INTRODUCTION

The following section identifies key goals and objectives for the Military Avenue corridor. The action plan in Chapter Seven further breaks down these goals into specific action items, with a matrix identifying specific priorities, timing and responsible parties for each action item based on public feedback.

Goals are broad tasks which contribute to achieving the plan vision and, by extension, the eventual revitalization of Military Avenue. Each goal has beneath it a series of objectives identifying key components that should be included to successfully implement the plan. The objectives are the first step in identifying specific strategies to bring about these changes through a variety of policy, outreach and fiscal tools.

### GOALS & OBJECTIVES

**Goal #1: Improve corridor aesthetics through enhanced landscaping and lighting, improved placement of buildings and signage, and design guidelines for building types, facades and signage.**

This goal seeks to improve public perception by addressing aesthetic improvements that can be implemented throughout the corridor to provide a more appealing visitor experience. Improvements to facades and landscaping have been proven to directly influence the amount of time and money a shopper is willing to spend in a given location<sup>1</sup>.

The most common public sector involvement associated with improved aesthetics is concentrated in the public right of way and includes the provision of amenities such as street trees, lighting, planters, and street furniture. These elements are intended to improve the pedestrian experience and provide visual screening from undesirable elements (i.e. power lines, dumpsters). Burying power lines is preferred as funds permit – an option that was discussed for Military Avenue during the design phase of reconstruction, but did not proceed due to the cost. Figure 4.1 shows a particularly dominant power line feature located in the Village of Howard. Improvements on this site or

others near the Velp intersection need to be addressed cooperatively with the Village and the utility owner, which in this case, is American Transmission Company.

The addition of street trees is recommended to complete the Military Avenue infrastructure improvements. While some blocks have established street trees, they are lacking in many parts of the corridor. Street tree placement should vary by economic use, with a wider spacing in the regional retail sub-district to increase signage visibility. Spacing in neighborhood and office districts should be closer to provide greater street enclosure for pedestrians. Conceptual patterns and locations recommended for public right of way improvements are shown in Map 4.1.

Additional public sector activities include education and outreach to property owners in the district regarding design guidelines, zoning and design requirements for specific districts, and distributing information on private and municipal programs (such as the façade improvement program discussed below).

The use of aesthetic upgrades as a redevelopment tool usually involves some form of revolving loan fund to leverage public and private sector contributions. A revolving loan program provides matching dollars to property owners willing to invest in their properties. These low to no-interest loans provide funds for projects that meet a set of established guidelines to leverage public sector contributions in the corridor. This type of loan program can fund

FIGURE 4.1 PUBLIC RIGHT OF WAY AESTHETIC IMPROVEMENTS



<sup>1</sup> Wolf, Kathleen. "Strip Malls, City Trees, and Community Values", *Arboriculture & Urban Forestry*, January, 2009.

a variety of improvements including signage, facades and landscaping.

Another key element of an aesthetic improvement program is the necessity of continuous monitoring of property conditions and emphasis on code enforcement. In order to maximize investments made under improvement programs, the City must hold properties to consistently high standards of maintenance, including vacant properties. Maintenance and landscaping of vacant lots has been shown to increase adjacent property values by up to 20 percent<sup>3</sup>.

A more extensive description of specific design guidelines and streetscape improvement recommendations can be found in Chapter Six.

- **Objective 1.1:** Implement and promote use of guidelines for the physical redevelopment of, and public and private improvements to, the corridor.
- **Objective 1.2:** Mitigate potential obstacles within existing City regulation to promote desired development patterns and types.
- **Objective 1.3:** Improve amenities within the public right-of-way.
- **Objective 1.4:** Coordinate appearance and placement of signage in the district.
- **Objective 1.5:** Remove visual clutter within corridor.
- **Objective 1.6:** Encourage enhancements to existing structures and sites.
- **Objective 1.7:** Improve aesthetics of vacant land and storefronts.

**Goal #2: Create a unique identity that sets apart the Military Avenue Business District as a convenient, walkable and attractive environment for doing business. Support the identity with features such as shared parking areas, improved transit options, walkable sub-districts, and the co-location of complementary mixed land uses.**

The successful accomplishment of this goal requires coordinated public and private sector efforts. The existing Military Avenue Business Association is a positive starting point, serving as a convening body for the district's interests. The creation of an official Business Improvement District (BID) along Military Avenue would provide area landowners with additional ability to have influence over the district and push for initiatives

that would best meet corridor needs. A BID would also provide a mechanism for funding initiatives apart from the City and allow the corridor to pursue a more aggressive agenda where desired. Creating a district involves a number of legal and administrative steps. Although time consuming, this process provides valuable consensus on district goals and objectives and will provide a concise mission for the district's formative years.

A secondary benefit of creating a formal Business Improvement District is the ability to unite businesses and properties under a common brand or theme. The ability to present a unified message and appearance is a critical element that can influence the competitiveness of a business district. Retail corridors typically struggle to compete regionally based on a lack of cohesive marketing in comparison with competing shopping centers and malls. With the formation of a BID, the corridor would have an official structure for launching an external marketing and outreach program. To start, the program could provide a common logo, message statement(s), color palette, font and vision. Secondary stages of activity could include leveraging individual business marketing dollars through coordinated ad buys, seasonal mailers or district-wide events to target consumers more directly. The ability of local businesses to capitalize on an existing campaign also allows individual retailers to stretch marketing budgets further, better reaching niche markets.

- **Objective 2.1:** Continue process of exploring the formation of a Business Improvement District (BID) to organize corridor revitalization, identify corridor branding and finance projects and programs.
- **Objective 2.2:** Develop an overall brand and identity for the district and enhance public awareness of corridor.
- **Objective 2.3:** Attract outside visitors to experience the corridor.
- **Objective 2.4:** Establish the district and corridor as a destination by creating a physical environment differentiated from others found in the Green Bay market.
- **Objective 2.5:** Develop a single transit route that facilitates convenient north-south travel between destinations along the full length of Military Avenue.

<sup>3</sup>J. Blaine Bonham, Jr., and Patricia L Smith, "Transformation Through Greening," *Growing Greener Cities*. (Philadelphia: University of Pennsylvania Press, 2008).



**Map 4.1: Streetscape & Signage Improvements**

- Planning Area
- Major Gateway Feature
  - Vertical/overhead elements, District identification signage
  - Special landscaping, lighting, paving
- Minor Gateway Feature
  - Landscaping, District identification/directional signage
  - Special lighting
- Key intersections for pedestrian amenities, architectural features
- New street tree planting- 25-40' spacing
- New street tree planting- 75-100' spacing
- Infill street trees as needed- 25-40' spacing
- Street improvement- urbanize street edge, add sidewalks
- Pedestrian plaza connection, urbanize street edge
- Wayfinding/directional signage- pole mounted signage with key destinations/districts, locate in median or terrace
- Enhance entry drive- incorporate select elements from district streetscape
- Add bike lanes

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**Goal #3: Establish gateway features that increase corridor visibility and better connect Military Avenue to regional traffic flows and additional customers.**

The presence of gateway features provides a sense of place for visitors entering the district. Distinctive elements at defining intersections aid in visitor orientation, capture driver interest and help define the character of the district. Features that contain some element of wayfinding can also favorably influence traffic patterns by providing marketing and directional benefits. Major gateway features (Figure 4.2) at key intersections such as Lombardi Avenue and Mason Street can introduce Military Avenue to new visitors and regional commuters, thereby raising awareness of the corridor. Smaller gateway features such as planting beds and wayfinding signage can signify the entrance to specific sub-districts within the corridor. One of these two elements should be located at each district entrance, and at key intersections along Military Avenue. The creation of new traffic roundabouts along Taylor Street as part of the USH 41 reconstruction, as shown in the preliminary design plan (Figure 4.3), could create multiple potential locations for enhanced signage or gateway features. Conceptual location recommendations for gateway features and wayfinding signage within the Military Avenue Business District are shown on Map 4.1.

- **Objective 3.1:** Establish Gateway Features at key intersections.
- **Objective 3.2:** Increase the presence and visibility of Military Avenue from the major highways.

FIGURE 4.2: GATEWAY FEATURES



(c) Tim Gorichanaz

FIGURE 4.3: USH 41 & MASON STREET PRELIMINARY DESIGN



**Goal #4: Improve connectivity and business mix so that the customer base of the surrounding neighborhoods will purchase goods and services from Military Avenue businesses.**

This goal aims to make the district better-connected, more convenient and enjoyable for local residents by incorporating both vehicular and pedestrian access improvements with an enhanced business mix. An important component of this is the reinstatement of the pedestrian-scale street grid as redevelopment occurs. Commercial properties along the Military Avenue frontage have modified this grid by combining blocks together, making it difficult for nearby residents to walk or bike to shops. Redevelopment sites should provide aesthetically pleasing and safe bicycle and pedestrian connections between their facility and adjacent residential neighborhoods, especially where it is not practical to reinstate the street grid. Connectivity between adjacent commercial parcels is also relatively non-existent. In many cases, a blank wall or fence separates two developments which needlessly increased traffic by requiring people to use the streets to drive to an adjacent shop. Such lack of internal connectivity reduces convenience, which makes customers more likely to drive elsewhere when they are already in their vehicle.

A significant factor that could limit local resident spending is the ability to provide the necessary range of goods and services required by adjacent neighborhood residents. Objectives related to improving corridor business mix have been designed to capitalize on identified

gaps in supply for Military Avenue trade areas. Maximizing business mix requires a multi-faceted approach including;

- Focusing on existing business retention,
- Entrepreneurial development, and
- Targeted business recruitment.

While initial strategy recommendations are provided below, successful business retention and expansion programs must constantly evolve to respond to changing business concerns.

The simplest way to maintain a healthy business environment is to retain and strengthen existing businesses. Many resources already exist within the Green Bay community with the goal of supporting existing small businesses. Linking businesses with these available resources (such as the Small Business Administration, Small Business Development Center, Technical College and others) will foster business connections and growth. Support organizations providing specific services such as financing, mentorship and industry networking can be key partners for a district with start-up or struggling businesses.

Attracting and growing new small businesses within the corridor can also be a successful business expansion strategy. In its simplest form, entrepreneurial development capitalizes on small, low-rent spaces by pairing start-up businesses with access to support and advisory services. The coordinated support from programs such as the Urban Hope Program and Chamber Micro-Lending Program can help steer new companies through the initial start-up phase.

Following a one to two year subsidized period, tenants should rent space in other vacant spaces along the corridor. As a follow-up to the business incubation program, a transition program where landlords accept a base rent plus percent of sales rate structure for an initial time period may boost transition success rates and provide for more stable long-term tenancy prospects.

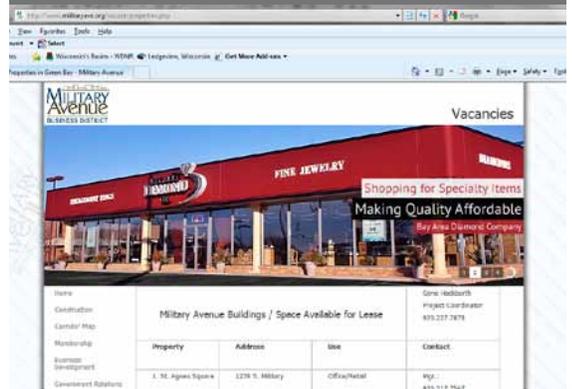
Lastly, a targeted business recruitment program utilizes local knowledge of existing industry gaps and available properties to develop an outreach program designed to match local or national tenants with desirable spaces in the corridor. The most effective recruitment plans require an ongoing program with a designated point person. Targeted efforts must be made to provide specific industry knowledge relevant to recruitment targets which makes a business case for the corridor. Recruitment strategies may also incorporate financial packages, redevelopment

assistance for new large retailer or company facilities, tenant improvement dollars or subsidized rental rates or purchase prices.

Perhaps the most important component of all of the above programs is the ability to provide relevant, accurate and timely market information on the corridor. Whether relocating or expanding in the corridor, companies will make decisions based on the best information available. Locations which pose too many unknowns are considered a risky investment. Providing information on the existing market, spaces currently available and existing community resources will benefit the corridor. The Military Avenue Business Association currently has a well-designed website that incorporates several of the above-listed items (Figure 4.4). This information should be continually maintained and updated. A reputation for stale or inconsistent data will reduce the attractiveness of the corridor to prospective tenants.

- **Objective 4.1:** Provide appropriate transitions, buffers and connections between existing single family neighborhoods and commercial activity along Military Avenue.
- **Objective 4.2:** Establish an environment more conducive to pedestrians.
- **Objective 4.3:** Encourage business clustering to reduce trips, improve connectivity and establish nodes of activity.
- **Objective 4.4:** Accelerate organic growth of firms already within the Military Avenue Corridor.
- **Objective 4.5:** Attract new business tenants to the corridor.
- **Objective 4.6:** Improve entrances to/from Military Avenue to surrounding traffic areas through signage and inviting streetscape.

FIGURE 4.4: PROPERTY INFORMATION



**Goal #5: Carefully target and focus retail development based on market opportunities and through the identification of corridor sub-districts with specific purposes and themes.**

Corridor sub-districts have been described in the Economic Positioning section of Chapter Three. The proper physical environment must be created inside each sub-district to support desired businesses. Business retention and recruitment can move the district toward a more synergistic business mix over time. For retail, a synergistic mix is one that draws the desired customers. Retail drawing power is usually achieved with a strong retail anchor business but it can also be created by a number of smaller businesses that appeal to a similar customer and collectively create enough density to draw customers from a distance. Some retail clusters focus on specific goods (such as restaurant or automobile clusters), while others will target a type of customer and encourage multiple stops with a wide range of goods (such as a neighborhood-oriented shopping node).

- **Objective 5.1:** Maximize and build on existing business clusters.
- **Objective 5.2:** Continue to utilize market data to keep the vision for the corridor fresh and grounded in reality.

**Goal #6: Direct higher density development to key activity nodes at higher traffic intersections.**

Currently, land use densities along Military Avenue are fairly homogeneous, with single-story, single-use development being the predominant form. Higher densities and a wider mix of uses are encouraged at key intersections. Development of these nodes would increase land utilization, bring more local customers to the corridor and help improve corridor aesthetics. Intersections with key cross-streets make the most sense for such redevelopment for several reasons: land values are highest in these areas, upper-story commercial development would have the best visibility, and these intersections have the best regional connectivity to handle increased traffic loads.

These mixed-use, higher density projects can also have a catalytic impact on overall corridor redevelopment, especially those that remove blighting influences. External benefits of such catalytic projects make them candidates for potential public assistance. Large-scale infill projects can be difficult for the private sector to construct without assistance, given the expense and uncertainty involved in assembling the required parcels and some banks' preferences towards funding suburban greenfield development projects over redevelopment projects.

- **Objective 6.1:** Prioritize catalytic projects at major intersections along Military.
- **Objective 6.2:** Create a signature node at 9th Street Intersection (See Figures 5.6 and 5.7).
- **Objective 6.3:** Generate activity at former Cub Foods Site (See Figures 5.2 and 5.3).
- **Objective 6.4:** Consider public sector financing structures to spur redevelopment activity.

**Goal #7: Enhance existing public parks and green spaces along Military Avenue, and strategically incorporate additional public space into revitalization plans.**

This goal expands on the desire to improve non-vehicular connectivity and overall pedestrian experience in the corridor. The corridor can expand on existing amenities to draw additional customer base onto the corridor by developing a comprehensive plan for corridor circulation that incorporates existing destinations and non-motorized trail networks. Grant funds are often available for improvements to trail networks. In addition to providing continuity from an access perspective, the extension of green elements into the corridor represents one of the most cost effective ways to improve corridor aesthetics. The presence of public gathering places will allow for programmable spaces suitable for public events.

- **Objective 7.1:** Integrate community anchors such as cultural facilities and parks into the commercial corridor.
- **Objective 7.2:** Carry greening elements from parks into streetscape and site design.

**Goal #8: Increase pedestrian and bicycle safety and connectivity at intersections, in parking areas, and at business access points, especially in sub-districts focused on neighborhood retail and service businesses.**

The current lack of sufficient pedestrian and bicycle facilities requires pedestrians and bicyclists to cross multiple access drives and parking areas, where drivers are not conditioned to be on the lookout. The presence of pedestrian pathways and amenities, especially when coupled with traffic calming strategies, will make drivers more aware of pedestrians, and significantly enhance safety.

- **Objective 8.1:** Draw awareness to presence of non-vehicular modes of transportation.
- **Objective 8.2:** Expand pedestrian and bicycle enhancements onto private properties via parking area crosswalks, bicycle parking and the like.

**Goal #9: Improve motor vehicle traffic safety and flow to and from Military Avenue businesses, within large parking areas and between adjoining businesses, especially in areas appropriate for auto-dependent and regional retailers.**

As mentioned in goal eight, improving traffic flow provides multiple corridor benefits. Current road and parking configurations feature multiple ingress/egress points per block, several frontage roads, confusing internal parking lot circulation, and an overall lack of parking lot landscaping. This inconsistent environment increases the potential for crashes and congestion. Reducing individual business access points onto Military Avenue by sharing driveways and interconnected parking lots will help address these issues. More internal connectivity can reduce left turn volume, further reducing congestion and improving visitor experiences.

Other strategies can also be employed over time as parcels are redeveloped or renovated. Locating employee and ancillary parking in the rear of properties can minimize the time customers spend circling for spaces. The addition of landscaped buffers and parking lot islands can also slow traffic, reducing the likelihood of both vehicular and pedestrian incidents. Additional specific parking lot recommendations can be found in Chapter Six, Design Guidelines.

FIGURE 4.5: PEDESTRIAN SAFETY



It should be noted that significant improvements to access control were accomplished during the reconstruction of Military Avenue. The number of access points onto Military was effectively reduced, and many of the remaining conflict points are actually found on the cross streets. A block-by-block planning process was engaged at the time of the reconstruction design in order to solicit property owner input on access issues. For any remaining areas of concern, the intent of this plan is to pull back private access drive locations to create additional intersection separation, thus increasing safety, as redevelopment takes place on corner lots.

- **Objective 9.1:** Streamline and coordinate traffic flow within parking areas.
- **Objective 9.2:** Coordinate traffic flows throughout district to prioritize signaling and turn lane activity.
- **Objective 9.3:** Minimize driver distractions.
- **Objective 9.4:** Reduce number of individual business access points onto Military Avenue.

**Goal #10: Realize in-fill development of non-retail uses where appropriate, resulting in additional local and commuter customers and expanded tax base.**

As mentioned earlier, an increase in density for newly developed parcels is desirable, bringing increased numbers of workers and residents to the corridor. Goal number ten seeks to create a favorable environment for alternative development to occur. First, as part of the neighborhood rezoning efforts, allowance should be made for multistory properties and mixed-use zoning. Additionally, working with developers to identify sites where retail uses are less likely to be successful and designating these locations specifically for office or residential uses can focus developer interest on these sites. On an ongoing basis, the business district and City should work with existing companies in the corridor to ensure that sufficient facilities exist to accommodate predicted growth or contraction. Where existing facilities and onsite expansion options are not adequate, sites can be identified for new development, providing further opportunities to retain businesses in the corridor.

- **Objective 10.1:** Identify locations for development of multi-tenant office properties.
- **Objective 10.2:** Encourage development of mixed-use properties.

**Goal #11: Encourage the development of housing types demanded by changing demographics, such as senior housing, market rate townhomes and assisted living.**

Some identified market niches that are currently not being satisfied include townhomes and apartment properties, as well as housing options geared toward growing senior populations. An initial step is the identification of developers with experience in these specific property types who can aid the City in identifying likely sites. Subsequently, the City, through the rezoning process, should ensure that higher density residential development is included in the range of allowable uses for identified areas. For senior housing development, sites and zoning should accommodate specific circulation and other specific amenities appealing to the target demographic.

In addition to the construction of new housing units, surrounding neighborhoods should be maintained and enhanced. This requires tackling the challenge of updating and renovating the existing housing stock to meet modern expectations. The maintenance of stable and desirable adjacent neighborhoods is a key element for revitalizing Military Avenue itself. Some potential programs that can aid in this transition include revolving loan programs with matching dollars for home upgrades, a streamlined approval process and/or waiver of fees on residential permitting for specific categories of property improvements, and the provision of pre-approved plans for alterations commonly desired by target demographics (master bathroom, garage, etc). These plans can often be developed in partnership with area universities and designed in accordance with the typical home layout in adjacent neighborhoods. Neighborhood associations and regular inspections are also helpful in maintaining stable neighborhoods.

- **Objective 11.1:** Encourage development of additional residential housing types.
- **Objective 11.2:** Encourage development of flexible and alternative housing options.
- **Objective 11.3:** Upgrade and modernize housing stock in surrounding neighborhoods.



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**Goal #12: Support the continued expansion of the St. Mary's Hospital as a regional draw to the area along with related office, outpatient and senior and assisted residential living opportunities.**

Currently, there is not a strong connection between the hospital campus and the Military Avenue corridor. The ability to meet the needs of hospital workers and visitors within the district will increase the overall customer base for corridor businesses. Because of the varied nature of the target demographic, a worker and visitor survey is recommended to help identify existing spending patterns and specific amenity gaps. This information can be used to provide targeted retail marketing by existing retailers as well as recruit new tenants that may be lacking in sectors such as restaurant, medical supply or lodging. The City and business district should continue to work with the hospital and existing medical tenants to support expansion plans and accommodate growth needs within the corridor.

- **Objective 12.1:** Integrate medical campus into residential and commercial areas of the district.
- **Objective 12.2:** Meet the needs of medical workers and visitors within the district.
- **Objective 12.3:** Retain and expand existing medical facilities.
- **Objective 12.4:** Recruit new medical related tenants.



## KEY REDEVELOPMENT SITES

### INTRODUCTION

Based on input from the Citizen Steering Committee, public workshops, stakeholder interviews, focus groups and analysis of property utilization, twelve properties (or collections of properties) were identified as key redevelopment sites, which are also shown on Map 5.1. Combined, these sites represent approximately 100 acres of redevelopment area and incorporate parcels at several key intersections. This acreage, if redeveloped appropriately, will change the overall feel of the corridor and influence subsequent renovation and redevelopment projects.

Some of the key redevelopment sites include parcels not currently contained within the Military Avenue Tax Increment Financing (TIF) District. If and when redevelopment activity becomes likely for these sites, creation of a new TIF or expansion of the current TIF may be appropriate.

These sites were prioritized by the Citizen Steering Committee and through public input. Highest priority redevelopment sites are those that are considered to have high potential as catalysts to spark additional private investment in the corridor. Improvements to these highly visible locations would help transform the business climate of the corridor as a whole with benefits extending well beyond their immediate locations. Table 5.1 contains the results of the prioritization exercise. Explanations of the identified redevelopment and infill sites follow, ordered by their geographic position along Military Avenue, moving from north to south.

### REDEVELOPMENT & INFILL SITES

Several of the site explanations include example concept plans depicting potential redevelopment scenarios. Concept plans are simply intended to aid visualization and portray a general idea for the site. The precise building layouts, circulation patterns, square footage, and other details are not intended to be regulating, unless specifically noted. Further study and creativity by future developers is encouraged.

No assumptions should be made about the feasibility of specific design elements of these concept plans, and various approvals might be required, including, but not necessarily limited to: Department of Public Works approval and hold harmless agreements for any improvements within city right of way, traffic impact assessment and intersection improvements, Americans with Disabilities Act (ADA) compliance, zoning and site plan approval, and the like.

#### Site 1: Perkins Plaza Outlots

##### Key Stats

**Site Size:** 3.3 Acres

**Existing Building Square Footage:** 0 SF

**Timing:** Short Term

**Key Features:** Immediate availability

Perkins Plaza, located on the north end of the Military Avenue Corridor at the southeast corner of Military Avenue and Bond Street, represents one of the newest retail centers on the corridor. The built retail center has very little vacancy but there are two large outlot parcels on the Military Avenue frontage which were never developed. This is available, greenfield space already served with utilities and access to Military Avenue. Development on these parcels would increase property utilization, TIF revenues, and enhance the pedestrian experience for this area.



**Site 2: Hospital Corridor**

**Key Stats**

**Site Size:** 6.6 Acres

**Existing Building Square Footage:** 168,446 SF

**Timing:** Mid Term

**Key Features:** Immediate availability, commercial and office uses

Within the St. Mary's Hospital corridor on Shawano Avenue, the site immediately east of the hospital complex represents an ideal location for senior housing development. The site extends east from the hospital roughly to Perkins Avenue, and is currently home to a multifamily development. The site is large enough to accommodate several types of senior housing on site with an increase in overall density. Figure 5.1 shows the St. Mary's Hospital Planned Unit Development. The hospital plans to expand its existing campus to the west in three phases, expanding the hospital itself and adding medical office space. Potential redevelopment on this site will coordinate with the plans for the hospital campus.

**Site 3: Southeast Corner of Shawano and Military Avenue**

**Key Stats**

**Site Size:** 4 Acres

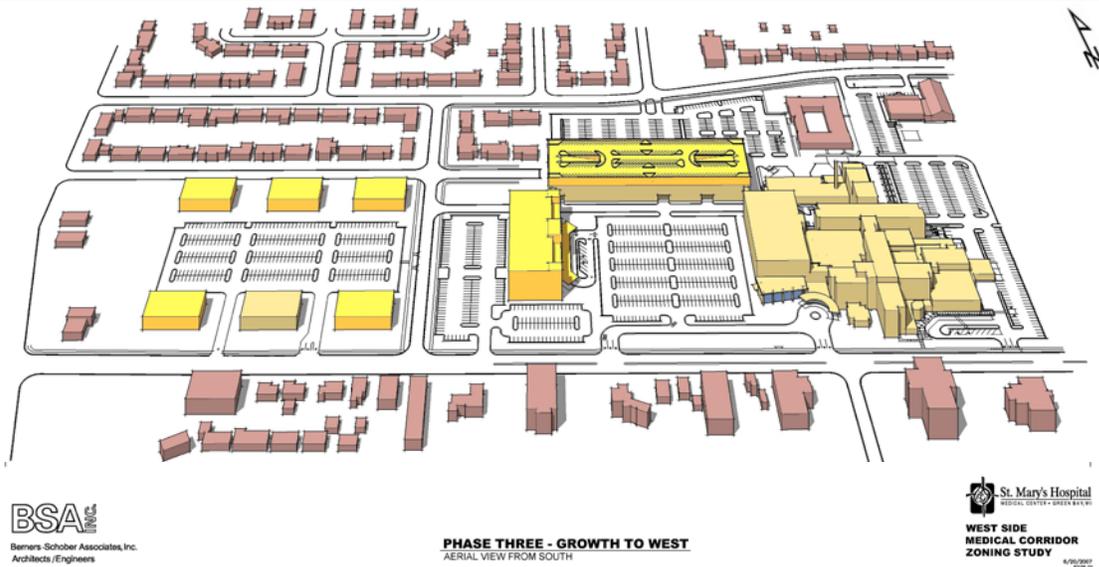
**Existing Building Square Footage:** 20,199 SF

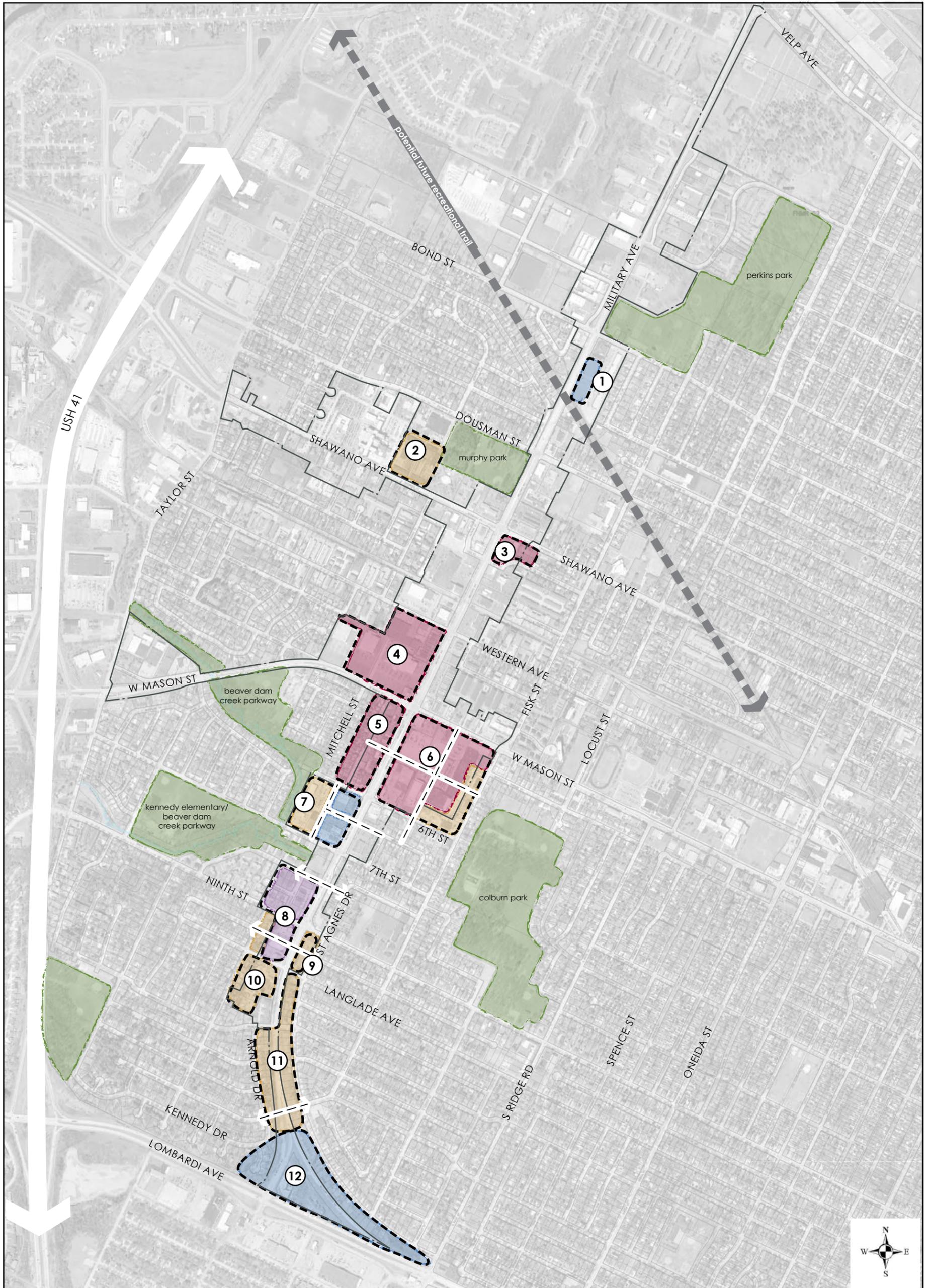
**Timing:** Long Term

**Key Features:** Repositioned building and parking areas, improved access

Site number three represents the northern gateway intersection for the proposed regional retail sub-district. The site is currently home to a single story strip retail facility. The existing layout provides challenging vehicular access for shoppers, with an existing curb cut located close to the highly trafficked intersection of Shawano Avenue and Military Avenue. This configuration makes ingress and egress from the site difficult. The site represents an opportunity for modern auto oriented retail with landscaped monument signage and supplemental rear parking. The ability to create shared parking and access with other parcels on the block could significantly improve retail center performance.

FIGURE 5.1: ST. MARY'S HOSPITAL EXPANSION PLAN PHASES I-III





**Map 5.1: Key Redevelopment Sites**

- Planning Area
- Retail Commercial
- Office Commercial
- Mixed-Use Retail/Office/Res.
- Townhomes/Senior Housing
- Existing Park
- Desired Future Connection

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**Site 4: Former Cub Foods Site****Key Stats****Site Size:** 15 Acres**Existing Building Square Footage:** 248,679 SF**Timing:** Short Term**Future Square Footage:** 383,365 SF**Project Phasing:** 2 Phases**Projected Absorption Period:** 5 Years**Key Features:**

- Big box retail, outlot development
- Location for large-format retailer to serve as anchor for corridor
- Assembly of smaller, adjacent parcels into larger redevelopment site is desired.
- Interconnected traffic circulation and shared parking among buildings
- Building frontage provided on both Military Avenue and Mason Street where visible from street

The former Cub Foods site as depicted in the concept plan (Figure 5.2) also includes the adjacent Toys R' Us, retail strip center, outlots, gas station and neighboring industrial property. The resulting site would encompass Military Avenue and Mason Street frontage from Western Avenue to the signalized entrance to Toys R' Us on Mason Street. This combination of parcels represents the second largest redevelopment opportunity in the corridor. Due to the existing vacancy at the Cub Foods property, it also represents a realistic shorter term redevelopment opportunity. The site is located at the highest trafficked intersection on the corridor, is large enough to accommodate most national retail tenant requirements, and represents a truly catalytic opportunity.

**FIGURE 5.2: CUB FOODS SITE CONCEPT PLAN**

Example site plans were created for this site to aid visualization and estimate potential square footage yield potential. Plans were developed to incorporate overall building form, massing and land use patterns identified as suitable for desired business activity on the site. Figure 5.3 depicts the short-term concept plan, utilizing only the southern half of the site.

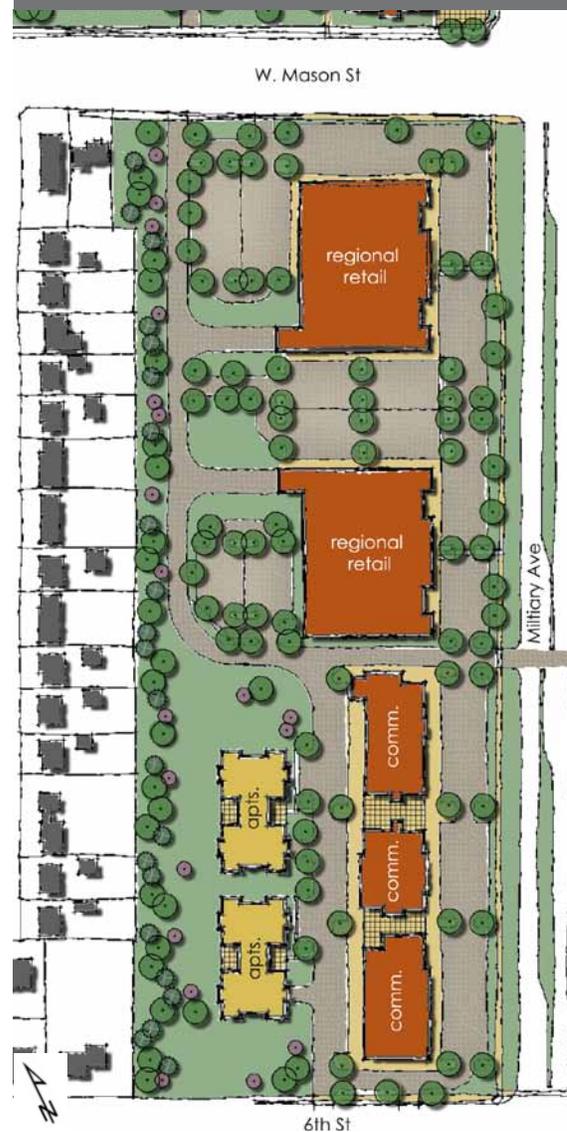
FIGURE 5.3: CUB FOODS SITE CONCEPT PLAN PHASE I



**Site 5: Southwest Corner of Military Avenue and Mason Street****Key Stats****Site Size:** 3.1 Acres**Existing Building Square Footage:** 33,771 SF**Timing:** Short Term**Future Square Footage:** 140,000 SF, 48 Residential Units**Key Features:** Interconnected parking and access, residential buffer, compatibility of uses

Located directly across the street from the former Cub Foods Site (Site Four), this location also represents a key gateway parcel with an opportunity to create an architectural and design identity for the corridor. The site is currently home to a variety of free standing individually owned retail and service establishments along Military Avenue. It was identified by many as a blighting influence in the corridor because of the number of individual businesses and signage and the poor circulation pattern. Assembling these properties and the adjacent residential properties to the west would provide sufficient depth to allow large-format retail development and associated parking (Figure 5.4). It would also allow development of a new, inter-connected circulation system that would increase the utility of the properties.

The rear of the block is currently home to single family residences on both sides of Irvington Street. If these homes were incorporated into future redevelopment, it would allow adequate depth for large-format retailers and an integrated circulation and parking system. If residential properties on only the east side of Irvington Street were redeveloped, the remaining houses would be isolated and would face the rear of the commercial development. For these reasons, this plan recommends that development proposals incorporate the residential properties on both sides of Irvington Street, assuming that these properties can be purchased from their owners and that a desirable plan can be approved. However, the residential properties accessed from Mitchell Street should be protected and that neighborhood preserved, including not allowing commercial redevelopment traffic to mix with residential traffic on Mitchell Street. A sufficient landscape buffer should be incorporated into the rear of development, and the compatibility of future land uses must also be considered in order to protect this neighborhood. For example, 24 hour establishments are less desirable, from a neighborhood compatibility standpoint, than uses with more typical daytime or evening hours of operation.

**FIGURE 5.4: SOUTHWEST CORNER MILITARY & MASON CONCEPT PLAN**

The site includes existing residential properties, so it is especially important to understand the market driven nature of any potential redevelopment at this location. Feasibility of the concept shown depends upon market conditions allowing for willing sellers and buyers of private property to reach agreement on the transfer and assembly of property to form a larger development site. The 'Short Term' timing shown here assumes that these agreements can be reached in a mutually beneficial way and also assumes that the concept for the Former Cub Foods Site has materialized, thus increasing demand for additional commercial property nearby.



**Site 6: Green Bay Plaza**

**Key Stats**

**Site Size:** 29.6 Acres

**Existing Building Square Footage:** 398,145 SF

**Timing:** Short Term

**Future Square Footage:** 500,000 SF

**Project Phasing:** 3 Phases

**Projected Absorption Period:** 8 Years

**Key Features:**

- Mix of uses, increased density, public spaces
- Parking lot safety and green space improvements

- Retention of existing tenants
- Re-establishment of pedestrian and vehicle connections at a smaller scale, increasing circulation and connectivity
- Higher density of uses, including townhomes and additional commercial space
- Incorporation of public plazas or gathering spaces

Green Bay Plaza, located at the southeast corner of Mason Street and Military Avenue, is currently home to a traditional shopping mall anchored by Sears department store. The mall has a mix of retail offerings and an established customer base. This plan encourages the continued operation of Green Bay Plaza and the retention of existing tenants as well as continued

FIGURE 5.5: GREEN BAY PLAZA SHORT TERM CONCEPT PLAN



improvements and changes to the mall that best serve the retail needs of the neighborhoods, the space needs of existing and new tenants, and the profitability of the mall ownership. In the short term, these improvements may include renovations such as façade facelifts, existing structure renovations, parking lot improvements, and other minor improvements to the buildings and grounds. In the long term, the local economy may allow a partial redevelopment to incorporate additional uses on site. If and when this redevelopment occurs, the site represents an opportunity to introduce higher-density uses at this key intersection.

This site also represents the transition from the Regional Retail sub-district to the Neighborhood Oriented Mixed Use sub-district. A successful transition needs to allow for a gradual shift in character from both a transportation and market standpoint, while providing for continuity of character and design. Figure 5.5 illustrates the addition of infill commercial and townhome sites on the site, along with parking lot improvements and the addition of public amenities.

#### **Site 7: Broadway Automotive**

##### **Key Stats**

**Site Size:** 7.2 Acres

**Existing Building Square Footage:** 70,547 SF

**Timing:** Long Term

**Key Features:** Mixed-use incorporating residential

This site is currently the home of the Broadway Automotive car dealership and is part of the neighborhood mixed-use sub-district. Traffic levels and regional exposure on this section of Military Avenue have decreased over the years, and operation of regional destinations such as a large auto dealership may not always continue to be viable. If the current user relocates, this site would be appropriate for mixed-use development. The site contains significant Military Avenue street frontage for commercial development. It is also adjacent to greenspace and close to parks and schools, both of which would benefit a residential redevelopment component.

**Site 8: Southwest and Northwest Corners of 9th Street and Military Avenue Intersection****Key Stats****Site Size:** 7.2 Acres**Existing Building Square Footage:** 40,275 SF, 6 Residential Units**Timing:** Mid Term**Future Square Footage:** 150,000 SF, Possible Residential Units**Project Phasing:** 3 Phases**Projected Absorption Period:** 6 Years**Key Features:**

- Buildings that include depth and height variation that fits with the surrounding residential neighborhood and creates a pedestrian-scaled development
- Pedestrian accommodations such as walkway linkages from Military Avenue to businesses.
- Outdoor plazas, arcades and seating areas
- High level of landscaping, especially the landscape buffer between the sidewalk and parking areas and greenery within parking lots
- Screened utility, loading and service areas
- Residential buffers

Existing development on these sites consists of a strip mall on the northwest corner and multiple small freestanding, independently owned retail and service businesses. This intersection is envisioned as the core of a neighborhood commercial center. Given relatively low traffic levels and excellent connectivity to large, stable neighborhoods nearby, this area is well-suited for retail and service providers that serve the neighborhood. Urban design and building scale that match the adjacent residential neighborhoods and accommodation of non-motorized transportation are important in the future redevelopment of this area.

A concept plan was prepared to show a future vision for the Military Avenue and 9th Street intersection which includes four specific redevelopment sites (Figures 5.6 and 5.7). The plan called for complete redevelopment of the sites to incorporate several design recommendations. The southern corner sites both received high levels of public support for redevelopment. As the concept shows, there is an opportunity to create a more intimate feel at this intersection and to redevelop these sites into a pedestrian-oriented center.

**FIGURE 5.6: 9TH STREET & MILITARY AVENUE CONCEPT PLAN**

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**Site 9: Southeast Corner of 9th Street and Military Avenue**

**Key Stats**

**Site Size:** 2.27 Acres

**Existing Building Square Footage:** 21,750 SF

**Timing:** Mid Term

**Future Square Footage:** 36,000 SF

**Project Phasing:** 1 Phase

**Projected Absorption Period:** 2 Years

**Key Features:** Neighborhood-oriented, multi-story, mixed-use

The third corner intersection in the neighborhood mixed-use district, this site is currently home to the Bay Family Motel and Restaurant. Due to the small block configuration between Military and St. Agnes Drive, the site represents the smallest of the three sites at this intersection. Given this small size, if redevelopment were to occur, the best use for the site is likely a mixed-use development with a small amount of commercial (service, retail or restaurant) on the first floor closest to the intersection of 9th Street and Military Avenue and residential or office spaces provided further south and on upper floors. Underground parking for office space and residential units would be preferred and could be accessed off St. Agnes Drive. It is also recommended that the site is developed with at least two smaller buildings with a pedestrian or vehicle cut-through bisecting the site east-west and generally lining up with the terminus of Russell Street. This concept is illustrated on the eastern portion of Figure 5.7.

**FIGURE 5.7: 9TH STREET & MILITARY AVENUE CONCEPT PLANS**



**Site 10: Green Bay Nursery**

**Key Stats**

**Site Size:** 4 Acres

**Existing Building Square Footage:** 4,500 SF

**Timing:** Mid Term

**Future Square Footage:** 80 senior housing units

**Project Phasing:** 2 Phases

**Projected Absorption Period:** 6 Years

**Key Features:** Senior housing, residential buffers, compatible scale along Argonne Drive

The Green Bay Nursery represents a popular tenant and an attractive business which should remain as an anchor in the near future. If the current owner were to propose a new use, the site is appropriate for senior housing or another form of multifamily redevelopment as shown in Figure 5.8. Future redevelopment of this site should utilize building design and architecture that are compatible with nearby single family homes.

**FIGURE 5.8: GREEN BAY NURSERY SITE CONCEPT PLAN**



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**Site 11: Military Avenue from Langlade to Kennedy****Key Stats****Site Size:** 10.6 Acres**Existing Building Square Footage:** About 50,000 SF in single and two family homes**Timing:** Mid Term**Key Features:**

- Residential buffers, townhomes, landscaping and pedestrian connections
- Allow developments to incorporate existing homes on Military Avenue, provided the rest of design recommendations are followed.
- Multifamily, duplex, or townhome developments are appropriate along Military Avenue and can be accessed from residential streets but should face Military Avenue to provide a more aesthetic frontage.
- A uniform fencing or landscape buffer can be used to maintain a uniform street frontage where residential redevelopment is not planned (Figure 5.9).
- Pedestrian connections and sidewalks should extend along Military Avenue to Lombardi Avenue.

Currently, the connection from Lombardi Avenue to the 'core' of Military Avenue is very weak through this segment, due to the low-density single-family homes and duplexes that back up to the street. Uniform streetscaping, lighting, or sidewalks currently do not connect the Core of Military Avenue to the strong traffic generators and destinations present on Lombardi Avenue.

**FIGURE 5.9: FENCING BUFFER****Site 12: Lombardi Avenue and Military Avenue Intersection and Gateway****Key Stats****Site Size:** 15.3 Acres**Existing Building Square Footage:** 106,994 SF**Timing:** Short Term**Future Square Footage:** 265,000 SF**Project Phasing:** Master Planned**Projected Absorption Period:** 10 Years**Key Features:**

- High-density, commercial uses, high-impact architecture
- Development along Lombardi Avenue should be of higher density (3 to 6 stories) to maximize use of limited space, maximize value potential, and bring customers to the area – single-story retail development is discouraged
- Shared parking and underground/structured parking is encouraged to accommodate density
- The slip lane from Lombardi Avenue to Military Avenue should be vacated, and the surplus land integrated into future redevelopment projects
- Hospitality, entertainment, restaurant, and office uses are most appropriate along Lombardi Avenue
- Street frontage along Lombardi Avenue should be urbanized, with a buried storm sewer, and a sidewalk with a pedestrian plaza and amenities that provide linkage to Lambeau Field (Figure 5.11)
- Commercial buildings should be accessed from Military Avenue – commercial traffic should not mix with existing residential neighborhoods

- Site development will be master planned with access points, landscape buffers, parking areas and general building locations laid out.
- If residential lands are acquired by a developer to expand the commercial potential, traffic separation will be maintained, and ample buffering of the neighborhood will be required

A primary goal of local stakeholders was to enhance the Lombardi Gateway, increasing awareness of Military Avenue and attracting customers to corridor businesses. The properties with direct frontage to Lombardi Avenue have not yet maximized the commercial development potential of the advantageous location across from Lambeau Field. The redevelopment vision is illustrated in Figure 5.10.

This site includes existing residential properties, so it is especially important to understand the market driven nature of any potential redevelopment at this location. Feasibility of the concept shown depends upon market conditions allowing for willing sellers and buyers of private property to reach agreement on the transfer and assembly of property to form a larger development site. The 'Short Term' timing shown here assumes that these agreements can be reached in a mutually beneficial way and also assumes that the Green Bay Packers organization has begun to develop the Lombardi Avenue corridor, thus increasing demand for additional commercial property nearby.



FIGURE 5.11: PUBLIC PLAZA

FIGURE 5.10: LOMBARDI GATEWAY CONCEPT PLAN



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## RETROFITS AND BUSINESS RETENTION

Although this chapter deals with redevelopment, it is important to stress that complete redevelopment is not the only solution for the 12 sites analyzed above. Retrofits of sites and buildings will be a valuable tool in driving corridor revitalization, especially in the short term. Building façades can be renovated to add visual interest, improve aesthetics, and create more pedestrian-friendly areas throughout the corridor. Site layout can be improved to add landscape buffers between sidewalks and parking, add greenery to parking lots, and add outdoor seating areas and activity spaces. These concepts are illustrated in the short-term plans for Site 6 (Green Bay Plaza) and Site 8 (the Military Avenue and 9th Street intersection). Design Guidelines in Chapter Six have additional details on site and building retrofits.

Retention of existing businesses is also important to the corridor. Key redevelopment sites were identified due to site configuration, the condition of structures, and general low density. These decisions were not based on businesses that occupy the spaces. In fact, if redevelopment does occur, the hope is that most of the current businesses are able to move in to newly constructed space along the corridor. Chapter Four, Goal Four contains further discussion of business retention along Military Avenue.

## REDEVELOPMENT STRATEGY & TIMING

It is important to take a broader look at the corridor's competitive position within the larger Green Bay market in order to identify the most suitable method of spurring private development activity on Military Avenue. At the time of this planning process, the assessed value of property within the redevelopment sites ranges from \$250,000 to \$900,000 per acre. Large greenfield redevelopment sites elsewhere in the region have average asking prices of \$1 million per acre. While Military Avenue properties appear to have competitive purchase prices, the cost of demolition plus the time and legal costs entailed in negotiating and purchasing multiple properties and conducting lease buyouts make infill development much more difficult, with significantly more risk to the developer. Given these inherent difficulties, plus weaker traffic counts in comparison to suburban sites with highway frontage, redevelopment sites on

Military Avenue are having difficulty competing for developer interest. However, to achieve the vision for the future of Military Avenue, considerable redevelopment will have to occur.

In order to make redevelopment sites competitive with greenfield sites, it may be necessary for the public sector to provide technical and/or financial assistance. Ideally, a development partner could be found to perform most of the redevelopment duties. However, the public sector may need to assemble property and prepare sites to remove barriers and reduce risk in the redevelopment process and increase the likelihood of finding a private sector partner. Public intervention can serve as a catalyst for further redevelopment in the immediate area.

Many of the individual objectives associated with this goal involve projects at selected redevelopment areas. These parcels represent specific opportunities for implementation of the Military Avenue vision. The redevelopment of several key sites within the corridor will provide a concrete example for implementation of the corridor vision and show progress to businesses and property owners on the corridor. There have been several forward-thinking property owners that have provided highly desirable development or renovation activities in recent years, although mainly on a small scale.

It is important to keep in mind that initial redevelopment sites were identified as key sites based on the aforementioned criteria and some of these properties may not be immediately available, while other properties not identified may experience short-term redevelopment activity. Future proposed projects will be vetted through a public planning process which would consider appropriateness given surrounding uses, urban design, traffic impacts and conformance with this plan, among other considerations. In addition, projects that require public funding will need to meet specific financial requirements such as developer need, projected increased property values and will depend on timing and eligibility of the project for TIF or grant funds.

## PUBLIC INPUT

Table 5.1 shows the results of public input and Steering Committee prioritization of the redevelopment sites. The sites received rankings for relative importance both of timing and whether public assistance should be provided to promote redevelopment. Sites are listed in the order shown on Map 5.1, which moves from north to south along the Military Avenue corridor.

Note that the "Assistance Level" indicates whether the redevelopment site is anticipated to be primarily incentivized or primarily market driven. This indication of the primary driver of redevelopment recognizes that there are very limited public funds to assist redevelopment. These funds should be focused on the highest

priority projects and those that have the greatest potential to transform the corridor as a whole by serving as a catalyst that sparks additional private investment. As noted for the Green Bay Plaza Block, there may be elements of primarily market driven projects that could also be incentivized with public funds. And vice versa, every project that is incentivized with public funds will also include private funds. Public-private partnerships are also key to implement and fund redevelopment. Note that more detailed planning accompanies several of the key redevelopment sites. The concept plans within this Chapter and the specific action items in Chapter Seven highlight those sites considered to have true catalytic or transformative potential due to their visibility and significance.

TABLE 5.1: REDEVELOPMENT SITE PRIORITIZATION

Site	Time Frame (Years)			Assistance Level		Concept Plan	Action Plan
	(2 to 5)	(5 to 10)	(10+)	Primarily Market Driven	Primarily Incentivized		
1 - Perkins Plaza Outlots	X			X			
2 - Hospital Corridor		X		X			X
3 - SE Corner at Shawano Ave	X			X			
4 - Former Cub Foods	X				X	x	X
5 - SW Corner at Mason St (Frontage Rd)	X				X	x	
6 - Green Bay Plaza Block	X			X	Could have some incentivized elements	x	x
7 - Broadway Automotive			X	X			
8 - NW and SW Corners at 9th St		X		X		X	X
9 - SE Corner at 9th St		X		X		X	X
10 - Green Bay Nursery		X		X		X	
11 - Langlade to Kennedy (Corridor only)		X		X			
12 - Lombardi Avenue Intersection and Gateway	X				X		



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## DESIGN GUIDELINES

### INTRODUCTION

One message heard loud and clear throughout the planning process was that the aesthetics of Military Avenue need to be improved for the corridor to compete against other commercial destinations. There is also a desire to bring cohesion to the corridor to aid in joint branding, marketing, and establishment of a regional identity. The goal is to establish identity with common design elements, rather than an overt theme. The final guidelines represent the effort to create an identity, improve aesthetics, and increase the competitiveness of the corridor as a whole, all while accounting for the needs of individual businesses.

The following design guidelines provide recommendations to achieve the appearance and functionality set forth in the preceding vision, goals and objectives. Design guidelines incorporate diverse elements of private site and right-of-way design including site layout, building orientation and massing, architectural elements, signage, façade treatments and landscaping. These guidelines may be implemented through a design review process or zoning overlay districts, or they may be provided to developers and property owners as a reference guide for preferred aesthetics in the corridor.

The implementation of design guidelines will require continued planning process, stakeholder involvement, and consensus building. The adoption of this plan by itself does not create new regulations that can be enforced on new or existing development. Zoning regulations must be formulated and adopted as the outgrowth of this planning process. As enforceable design standards are developed in the future, it must also be understood that the desired features described here will need to be further refined and clarified to be appropriately applied to the various land uses found within the corridor. As a specific example, nursing and assisted living facilities found within the study area will not necessarily be held to the same façade design requirements as a retail store or a restaurant.

### OVERALL CORRIDOR DESIGN GUIDELINES

The following design guidelines provide specific recommendations relevant to design elements for the corridor as a whole. The second section identifies activities to be implemented on private sites, while the third section will deal with guidelines relevant to the individual sub-districts within the corridor. The design guidelines as a whole identify specific elements in the urban fabric which can be altered or improved, which, through implementation, will help to achieve the vision set forth in Chapter Three.

Recommended design guidelines were presented at the fourth public meeting, with attendees invited to complete a questionnaire about the relative importance of specific design guidelines and standards. For each element, examples of practical application were provided along with an explanation of purpose and potential benefits. The results of this exercise determined that every design element received a majority of rankings in either the 'important' or 'very important' categories. See Appendix Six for the full results of this exercise. The Steering Committee ultimately divided the design guidelines into three broad categories:

- **Required Standards(RS)**, are 'non-negotiable' items to be enforced for all new development activity on Military Avenue. These standards are appropriate for enforcement within the zoning code.
- **Strong Guidelines(SG)**, which are seen as important design elements but which afford a degree of built-in flexibility. Elements could be included within the zoning code as a set of options, or tied to financial incentives.
- **Design Suggestions(DS)**, which represent preferred elements but are regarded more as a suggestion to the developer. Suggestion elements are appropriate for inclusion in a design idea book or similar document for provision to area property owners.

The Steering Committee recommendation is included after each item in the form of the initials in parenthesis. A comparison between design guidelines and existing City of Green Bay zoning regulations is provided in Appendix Seven.



## PUBLIC STREETSCAPE GUIDELINES

With the completion of the Military Avenue reconstruction project, there are several opportunities to improve corridor amenities within the public domain. These items, which flank the street, are often some of the most notable and prominent elements of a streetscape, and can have a significant impact on public perceptions within the corridor. Many of the identified vision statements and goals for the district envision a corridor that is increasingly experienced by foot and bicycle. Achieving these goals requires public sector commitment to the provision and maintenance of various streetscape elements.

### Street Trees

There are several areas within the corridor where the consistent street tree pattern is broken or was never established. Other areas feature street trees that have been improperly trimmed, interfering with line of sight from automobiles to individual store signage. Street trees have been demonstrated to correlate with positive public perceptions of business quality<sup>3</sup>. In one 2009 study, respondents identified the retail center with a mature tree canopy as containing businesses of higher quality and more desirable merchandise than the same center without tree cover. Overall, landscaped centers received scores 25 percent higher than their non-landscaped counterparts. For Military Avenue, the new street reconstruction provides ample terrace room to create desirable plantings. These plantings should be spaced in accordance with sub-district character. Street trees within residential or Neighborhood Mixed-Use areas should be spaced at 25' to 40', while trees planted within the Regional Retail sub-district would be spaced at 75' to 100'. Established trees currently on the corridor are spaced at approximately 50 ft. on center. An illustration of street tree and other

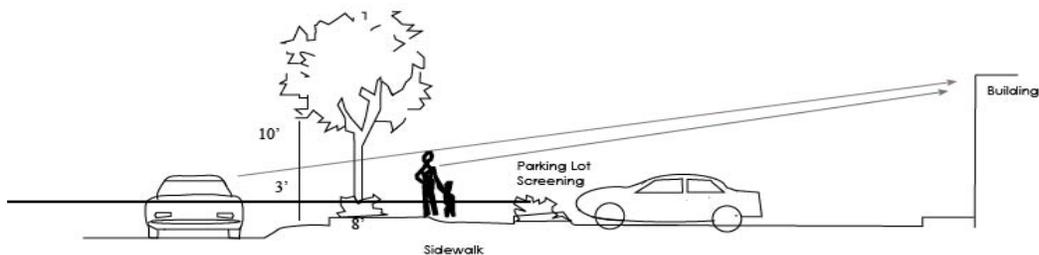
public streetscape recommendations can be found on Map 4.1.

- Tree species should be large, deciduous canopy trees which grow tall enough to enclose the corridor and can still be seen through and under to business signage (Figure 6.1). Honey Locust or Freeman Maple species provide sparse canopies with high clearance for visibility.
- Medium sized maturing tree species should be selected to provide a 30' crown radius.
- Trees should be trimmed so that mature canopies will begin at approximately 10 feet, to provide an appropriate angle for vehicles and pedestrians to view signage from beneath the canopy. Wayfinding can be enhanced through the addition of monument signage as discussed within the signage guidelines.
- Tree plantings should be done in phases with four-year cycles to ensure a variety of tree heights and ages along a block face to improve visibility and tree health.

Terraces between the sidewalk and street should be used to establish a vegetative buffer between the motor vehicle traffic and pedestrian traffic (Figure 6.2). The terrace area can be critical in accommodating pedestrians and multimodal transportation throughout the corridor. It should also be used to place landscaping accents to highlight key gateways and destination businesses or districts. Where it will not interfere with utilities, businesses should be allowed and encouraged to install and maintain additional landscaping in the terrace adjacent to their property to attract more attention to their business and beautify the corridor. Figure 6.1 depicts an appropriate terrace planting for use on Military Avenue.

<sup>3</sup>Wolf, Kathleen. "Strip Malls, City Trees, and Community Values"., Arboriculture & Urban Forestry. January, 2009.

FIGURE 6.1: TREE CANOPY



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FIGURE 6.2: TERRACE PLANTING



- Pedestrian-scale traditional street lights should be installed in the sidewalk terrace in the pedestrian-oriented shopping node south of Mason Street.
- Maximize opportunities for people to socialize by clustering amenities together to maximize use rather than spacing everything evenly along the street.
- Use plants with a variety of textures, colors and forms to add visual interest. Try to incorporate plants that flower or change in different seasons while maintaining a consistent theme throughout the district.
- Terraces can be a convenient location for bike racks and public art amenities so that these items do not take up valuable sidewalk space for pedestrians or other active uses.

#### Public Regulatory and Wayfinding Signage

Regulatory signage should reinforce sub-district theme through repetition of brand, choice of materials and consistent naming of districts.

- Reinforcement of sub-district identities can be provided through a subtle shift in signage materials and design within each district.
- Signage style should coordinate with lighting and pedestrian amenities.
- Ensure that wayfinding signage includes both roadway signage for vehicular traffic as well as pedestrian oriented signage that can be read easily while on foot.
- Signage should be streamlined to minimize clutter and improve message clarity.
- Wayfinding signage should be placed in such a way as to be consistently visible yet not compete with regulatory or storefront signage. Signage should be consistent and coordinated among public, private and non-profit entities.
- Multiple destinations per sign are encouraged up to three messages, with more detailed interpretive signage reserved for public spaces.

#### Blockface Design

The buildings, landscaping and lighting that exist on Military Avenue can be used to create vertical walls framing the street corridor and creating a consistent and predictable façade to pedestrians and motorists on the corridor. These vertical elements provide the walls of the outdoor room that is the street corridor, screen out detracting elements such as overhead lines and distant signage, and are needed to strengthen the sense of place in the Military Avenue corridor.

Given the wide right of way on Military Avenue and the low densities in the surrounding area, it would be impossible to reach full enclosure of the corridor with strictly building elements. However, consistent street tree selection and placement in the sidewalk terrace can supplement and establish the effect. This type of enclosure is illustrated in Figure 6.3.

FIGURE 6.3: BLOCKFACE DESIGN



Street trees can also enclose the roadway and provide comfort to pedestrians on the sidewalk. A landscape buffer outside of the sidewalk can help establish a consistent edge to the private property for corridor appeal in addition to providing a buffer for pedestrians from parking lots and driveways. Specific guidelines for Military Avenue designed to create a continuous corridor experience are as follows:

- Promote a uniform, predictable street enclosure. (SG)
- Promote consistent street tree species selection and placement. (RS)
- Include a landscape buffer to form a vegetative block face between sidewalk and building/parking areas (minimum 5-8 feet). (SG)

## PRIVATE SITE DESIGN

### Setbacks

In order to encourage street enclosure for new and redeveloped properties and to enhance safety for pedestrians, the following site design guidelines establish minimum and maximum setbacks for individual building uses. Guidelines should also address the variety of uses that can occur within this setback area.

- Establish a minimum setback of 5-8 feet from the right-of-way. (SG)
- Setback areas are to be used for landscaping, signage, outdoor seating and decorative fencing. (SG)
- If parking is necessary in front of buildings, set a maximum setback of 85 feet for buildings under 50,000 square feet. (SG)
- For buildings set back 85 feet or less, no more than 60 feet of setback can be used for parking (enough for 2 rows of parking and a

drive aisle); the remaining 25 feet is to be used for landscaping, pedestrian plazas, outdoor seating areas, etc. (SG)

- No maximum setback is needed for developments over 50,000 square feet, but promote or require pad development sites (outlots) if primary development set back is greater than 200 feet. (SG)
- If located on a corner, big box buildings with a front setback of more than 200 feet should include a secondary side façade with a setback of no more than 85 feet and supporting features that are more human/pedestrian scaled (SG)

FIGURE 6.5: PARKING LOT BUFFER



### Parking

A significant amount of current Military Avenue street frontage is dedicated to parking uses. Locating loading and ancillary parking to the rear of buildings improves pedestrian connections and reduces the amount of circling customers must do to find parking spaces (Figure 6.4). The following section details improvements to existing parking lots as well as strategies for redeveloped sites that will improve vehicular and pedestrian experiences in the corridor.

- Uses with different peak times are encouraged to share parking and access drives. (SG)
- Parking areas for adjacent developments should be connected if possible to improve circulation and reduce turn-lane congestion on Military. (SG)
- Parking and pedestrian areas should be separated from service, drive through and loading areas. (RS)
- Existing streetfront parking areas should be enhanced with interior landscaping, walkways and a landscape buffer (Figure 6.5) along the right-of-way to screen parking from the street. (RS in new and expanded parking areas, SG for existing with grant or incentive provision)

FIGURE 6.4: REAR PARKING LAYOUT



Design Guideline Key: (RS) = Required Standard, (SG) = Strong Guideline, (DS) = Design Suggestion

### Screening

Utility and service areas are essential to daily operations. However, these elements do not contribute to the aesthetic appeal of an area. Several strategies exist by which these elements can be camouflaged from view.

- Screening is required for ground level utility meters, mechanical equipment, refuse areas and other potentially unattractive or unsafe features. (RS)
- If screening is to be accomplished with vegetation, it should be equally effective in the winter as in the summer. (RS)

### Orientation

In addition to the issue of individual building setbacks addressed earlier in this section, the way in which a building interacts with the street and surroundings can also create an exciting and interactive experience along the street.

- Buildings should address Military Avenue with architectural details and windows. (RS)
- Buildings on intersections (corner lots) should also address the intersecting street with architectural details and windows on the side façade as shown in Figure 6.6. (SG)
- Buildings should have a primary entrance facing Military or should have a corner or secondary façade created that addresses Military. (DS in regional retail sub-district, SG in others)

FIGURE 6.6: BUILDING ORIENTATION



FIGURE 6.8: STORMWATER RAINGARDEN



### Lighting

The strategic use of lighting as a design element provides multiple benefits to a corridor, including improvements to aesthetics, safety and wayfinding. It must also be noted that pedestrian level lighting options for Military Avenue were discussed during the design phase of the street reconstruction, but were not implemented due to cost. Implementation of any additional lighting of the right of way will require creative financing and public-private partnership.

- Use pedestrian scale lighting around parking areas and sidewalks to extend hours of utility (including safety and crime prevention) for pedestrian districts (Figure 6.7). (RS)
- Use low-level building and landscape lighting to develop a sense of place and aid in wayfinding during evening hours. (RS)
- A specific design or style of lighting should be required for use within the front setback area along Military Avenue. (RS)

FIGURE 6.7: PEDESTRIAN LIGHTING



### Stormwater

Stormwater facilities should be incorporated into the design of the site. For example, bio-retention areas, raingardens and basins should be aesthetically pleasing and even include decorative elements. An example is shown in Figure 6.8. (RS)

Design Guideline Key: (RS) = Required Standard, (SG) = Strong Guideline, (DS) = Design Suggestion



**Signage**

Signage is often the most dominant element in a commercial corridor. The quantity and quality of signage provides visitors with an immediate sense of the identity of the corridor. Guidelines encouraging a consistent look and feel for this key design element present an opportunity for a consistent and crafted message about the type of companies that can be found in the area. Several examples are shown in Figure 6.9.

- Encourage free standing signs to be shared by multiple businesses with individual business signage mounted on the building façade or located on awnings above the primary entrance. (SG)
- For multiple-tenant developments, encourage shared, free-standing sign, but provide exception (additional signage) for anchor retailers in each development. (RS in regional retail sub-district, SG in others)
- In office, mixed-use and neighborhood oriented areas, encourage the replacement of tall pole/pedestal signs with lower pedestal signs and signage on buildings. Taller signs would continue to be allowed in regional retail areas. (SG)
- In office, mixed-use and neighborhood oriented areas, external illumination (such as building light fixtures) is the preferred method of illuminating signage. Internal signage illumination would continue to be allowed in regional retail areas. (SG)
- Rather than free-standing pedestal signs, require smaller monument signs for new development in office, mixed-use and neighborhood oriented areas (RS)
- Durable materials (masonry, stone, stucco, etc), natural colors, architectural details and solid bases matching the primary structure are encouraged for detached signage. (RS in Neighborhood Mixed-Use and Hospital sub-districts, SG in Regional Retail)

**Façade Treatments**

Many properties in the corridor will not be torn down and rebuilt in the near term. The following facade treatment strategies provide simple and lower cost strategies for improving existing properties as well as specifying key facade elements for new properties that will create a distinctive sense of place for the corridor.

- New and renovated buildings should utilize significant architectural elements to contribute to an upscale identity for the corridor (Figure 6.10). (SG)

FIGURE 6.9: MONUMENT, SHARED & BUILDING MOUNTAINED SIGNAGE



FIGURE 6.10: ARCHITECTURAL ELEMENTS



Design Guideline Key: (RS) = Required Standard, (SG) = Strong Guideline, (DS) = Design Suggestion



- Existing box development, particularly at prominent intersections, should be encouraged to add architectural elements. (SG)
- New and renovated retail/service commercial buildings should add the development of outdoor arcades, seating areas, plazas and enhanced pedestrian amenities. (DS)
- In commercial areas, wall transparency should be retained or increased to at least 60% with windows/glass at street level. (SG)
- The entry should be readily distinguishable and differentiated from the rest of the building. (SG)

## SUB-DISTRICT DESIGN GUIDELINES

The sub-district concept is introduced in Chapter Three of this document, which provided an overall illustration of character and desired development patterns within each sub-district. The section below provides specific guidelines related to development review recommendations within each sub-district.

### Regional Retail

Character: Retail centered buildings with mid-box to large-box stores focused here within site and building design parameters. (SG)

- Emphasis on creating a vibrant retail corridor with numerous retail destinations with shared access and a consistent and highly visible street front presence. (RS)
- Anchor big-box retail development encouraged to serve as traffic generator for the corridor. (SG)
- Outlot buildings should be placed at the minimum setback with parking located either in the back or on the side (Figure 6.11). (SG)
- Outlot buildings should have architectural details, facades and window openings on all building sides that face a public right-of-way. Secondary customer access points or outdoor patios on the Military Avenue side of the building are preferred. (SG)
- Outlots should share access points onto public roads with the primary retailer and other outlots where possible. (RS)
- Building architecture should complement the primary retailer and other outlots. (RS)
- Outlots will be limited to building mounted and awning signage and may also utilize free standing shared signage that serves the entire development. (RS)

FIGURE 6.11: OUTLOT BUILDINGS



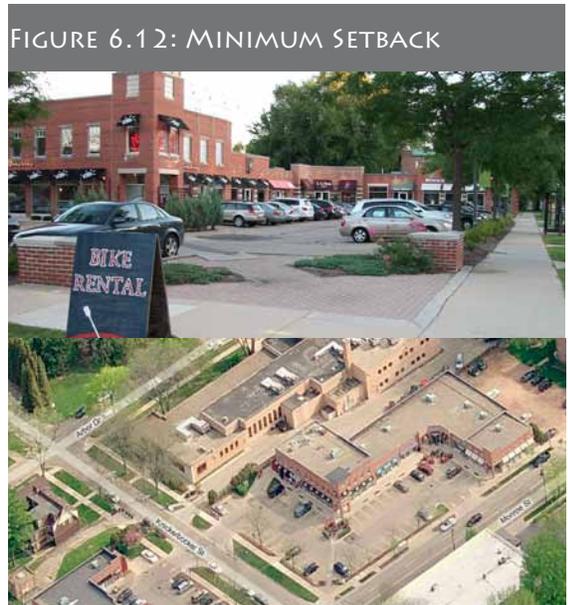
Design Guideline Key: (RS) = Required Standard, (SG) = Strong Guideline, (DS) = Design Suggestion



**Neighborhood-Oriented Mixed-Use**

Character: Small-scale redevelopment with a focus on high-quality architecture and pedestrian-oriented street frontage. Includes office and retail spaces catering to personal and professional service providers. (SG)

- Modulate scale and volume of larger buildings with varying façade depths, roof lines and materials to make a large building appear less massive. (RS)
- Consider requiring certain pedestrian oriented areas to have a minimum percentage of development brought up to minimum setback (Figure 6.12). (SG)



**Office/Hospital Campus**

Character: Larger office, medical, senior residential and hospital uses. Architecture consisting of 2-6 story buildings set back in a campus-like setting. (SG)

- Minimum 20 foot setbacks. (RS)
- Encourage abundant, quality landscaping in private setbacks. (SG)
- Parking optimally placed on side or rear of sites from Shawano Avenue and screened from view. (SG)

**Residential Infill**

Character: Townhome and multifamily properties with multi-story design and varied architectural styles.

- Minimum setback of 10-15 feet with doors, windows and sidewalks oriented towards Military Avenue. Garage entrances and parking should be located on the side or rear of buildings. (SG)
- Where possible, combine resident access and parking with other residential streets. (SG)
- Multifamily development should ideally be developed with individual entrances for each unit, but at a minimum, entrances would be shared by a small number of units (2-4) (Figure 6.13). (DS)
- Grade-separated entrances and windows for privacy from busy sidewalks (Figure 6.14). (RS)
- Clearly defined front-yard areas to discourage pedestrians from entering setback. (SG)
- Promote residential development in groups of smaller individual buildings (8 units or less each) (RS)
- In larger developments, group buildings around usable green space or other amenities. (RS)
- Encourage underground parking or covered, first-floor parking that is not visible from the street. (DS)



Design Guideline Key: (RS) = Required Standard, (SG) = Strong Guideline, (DS) = Design Suggestion

FIGURE 6.14: GRADE SEPARATED ENTRANCE, DEFINED FRONT YARD AREA



#### Lombardi Gateway

Character: From approximately Kennedy Drive to Lombardi Avenue, higher-density office, hospitality and entertainment node that relates to development surrounding Lambeau Field and serves as a southern anchor to Military Avenue. (SG)

- Commercial traffic separated from adjacent residential neighborhoods. (RS)
- Must be master-planned with shared access drives, parking, and pedestrian circulation. (RS)
- Urbanize Lombardi Avenue and Military Avenue street edges with curb, sidewalk, bike lanes and pedestrian accommodations. (RS)
- To make room for new development and provide a more focused gateway to the Military Avenue corridor, remove the northbound slip lane that currently extends from Ridge. (RS)

Design Guideline Key: (RS) = Required Standard, (SG) = Strong Guideline, (DS) = Design Suggestion



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## VII ACTION PLAN

### OVERVIEW

This section is intended to provide a roadmap for local stakeholders to follow through the redevelopment process. It includes a summary of plan goals and objectives (Table 7.1) as well as a set of clear, actionable steps along with associated timeframe and responsible party (Table 7.2). Action steps are provided in the areas of continued land use planning, upscale design,

organizational development and branding, completing the street, business recruitment, business retention and key redevelopment sites.

**Table 7.1: Summary of Plan Goals & Objectives**

Table 7.1: Summary of Plan Goals & Objectives	
Goal #1: Improve corridor aesthetics through enhanced landscaping, improved placement of buildings and signage and guidelines for building types, facades and signage.	
1.1	Implement and promote use of guidelines for the physical redevelopment of, and public and private improvements to, the corridor.
1.2	Mitigate potential obstacles within existing City regulation to promote desired redevelopment patterns and types.
1.3	Improve amenities within the public right-of-way.
1.4	Coordinate appearance and placement of signage in the district.
1.5	Remove visual clutter within corridor.
1.6	Encourage enhancements to existing structures and sites.
1.7	Improve aesthetics of vacant land and storefronts.
Goal #2: Create a unique identity that sets apart the Military Avenue Business District as a convenient, walkable and attractive environment for doing business. Support that identity with features such as shared parking areas, improved transit options, walkable sub-districts, and the co-location of complementary mixed land uses.	
2.1	Continue process of exploring the formation of a Business Improvement District (BID) to organize corridor revitalization, identify corridor branding and finance projects and programs.
2.2	Develop an overall brand and identity for the district and enhance public awareness of corridor.
2.3	Attract outside visitors to experience the corridor.
2.4	Establish the district and corridor as a destination by creating a physical environment differentiated from others found in the Green Bay market.
2.5	Develop a single transit route that facilitates convenient north-south travel between destinations along the full length of Military Avenue.
Goal#3: Establish gateway features that increase corridor visibility and better connect Military Avenue to regional traffic flows and additional customers.	
3.1	Establish Gateway Features at key intersections.
3.2	Increase the presence and visibility of Military Avenue from the major highways.



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Goal #4: Improve connectivity and business mix so that the customer base of the surrounding neighborhoods will purchase goods and services from Military Avenue businesses.

4.1	Provide appropriate transitions, buffers and connections between existing single family neighborhoods and commercial activity along Military Avenue.
4.2	Establish an environment more conducive to pedestrians.
4.3	Encourage business clustering to reduce trips, improve connectivity and establish nodes of activity.
4.4	Accelerate organic growth of firms already within the Military Avenue Corridor.
4.5	Attract new business tenants to the corridor.

Goal #5: Carefully target and focus retail development based on market opportunities and through the identification of corridor sub-districts with specific purposes and themes.

5.1	Maximize and build on existing business clusters.
5.2	Maximize business clustering within sub-districts.

Goal #6: Direct higher density development to key activity nodes at higher traffic intersections.

6.1	Jumpstart catalytic projects at major intersections along Military.
6.2	Create a signature node at 9th Street Intersection.
6.3	Generate activity at former Cub Foods Site.
6.4	Consider public sector financing structures to spur redevelopment activity.

Goal #7: Enhance existing public parks and green spaces along Military Avenue, and strategically incorporate additional public space into revitalization plans.

7.1	Integrate community anchors such as cultural facilities and parks into the commercial corridor.
7.2	Carry greening elements from parks into streetscape and site design.

Goal #8: Increase pedestrian and bicycle safety and connectivity at intersections, in parking areas, and at business access points, especially in sub-districts focused on neighborhood retail and service businesses.

8.1	Draw awareness to presence of non-vehicular modes of transportation.
8.2	Expand pedestrian and bicycle enhancements onto private properties via parking area crosswalks, bicycle parking and the like.

**Goal #9: Improve motor vehicle traffic safety and flow to and from Military Avenue businesses, within large parking areas and between adjoining businesses, especially in areas appropriate for auto-dependent and regional retailers**

9.1	Streamline and coordinate traffic flow within parking areas.
9.2	Coordinate traffic flows throughout district to prioritize signaling and minimize turn lane activity .
9.3	Minimize driver distractions.
9.4	Reduce number of individual business access points onto Military Avenue .

**Goal #10: Realize in-fill development of office and residential uses where appropriate, resulting in additional local and commuter customers and expanded tax base.**

10.1	Identify locations for development of multi-tenant office properties.
10.2	Encourage development of mixed-use properties.

**Goal #11: Encourage the development of housing types for which a market demand is currently unmet, such as senior housing, market rate townhomes and assisted living.**

11.1	Encourage development of additional residential housing types.
11.2	Encourage development of flexible and alternative housing options.
11.3	Upgrade and modernize housing stock in surrounding neighborhoods.

**Goal #12: Support the continued expansion of the hospital as a regional draw to the area along with related office, outpatient and senior and assisted residential living opportunities.**

12.1	Integrate medical campus into residential and commercial areas of the district.
12.2	Meet the needs of medical workers and visitors within the district.
12.3	Retain/expand existing medical facilities.
12.4	Recruit new medical related tenants.



Table 7.2: Action Items

## Category: Continued Land Use Planning

	Prescribed Action	Responsible Parties	Time Frame	Goal Reference
1	Explore options for better integrating Murphy Park into the Military Avenue streetscape.	City: Parks, Planning, Neighborhoods	1-2 Years	7
2	Identify likely sites for new construction or existing sites for redevelopment targeting new larger floor plate office buildings.	City: ED and Planning Business District	2-5 Years	5,6,10
3	Approve redevelopment projects consistent with the recommendations for the corridor, including strategic sites identified for multifamily	City: ED and Planning RDA, EDA, Plan Commission City Council	2-5 Years	4,11
4	Work with local university to develop guidebook for most common home upgrades for current housing floor plans.(addition of second bathroom, pop-top, garage addition, etc).	City: Planning, Neighborhoods, SGB NWTC UWGB	2-5 Years	11
5	Complete the acquisition and develop the trail on the Canadian National railroad right-of-way.	City: Parks and Planning	2-5 Years	7
6	Identify sites throughout the district suitable for outdoor public art displays, either ground mounted or murals on exposed building facades that don't have active facades.	Business District	5-10 Years	1,7
7	Identify additional commercial sites unlikely to attract retail or office development and rezone to accommodate residential.	City: ED and Planning	Ongoing	4,6,10,11
8	Identify developers experienced in serving the senior population.	City: Planning and ED Developers	Ongoing	4,10,11
9	Utilize HOME, Neighborhood Enhancement, and other eligible programs for housing upgrades. Encourage projects improving façade, adding space, or upgrading utilities/electrical.	City: Neighborhood	Ongoing	10,11
10	Identify parcels near medical facilities suitable for senior and assisted care facilities.	City: Planning and ED Business District Developers	Ongoing	11,12
11	Work with developers to include office spaces above pedestrian oriented retail on developments moving forward in the area.	City: ED and Planning Business District Chamber Developer	Ongoing	4,10

## Action Items

## Category: Upscale Design

	Prescribed Action	Responsible Parties	Time Frame	Goal Reference
1	Survey existing signage and coordinate future City, State and other public entity signage into comprehensive wayfinding system.	City: Planning, DPW, ED, Brown County, WisDOT	1-2 Years	1,2,3
2	Create signage guidelines for Military Ave corridor specifying size, materials, fonts and lighting.	City: Planning Business District	1-2 Years	1,2
3	Amend zoning ordinance and re-zone properties where appropriate to encourage desired development	City: Planning	2-5 Years	1,4,5,6,10,11,12
4	Create design overlay districts where general zoning ordinance updates are not appropriate.	City: Planning	2-5 Years	1,4,9
5	As part of neighborhood rezoning, include design guidelines for multi-story properties and mixed-use zoning.	City: Planning	2-5 Years	1,10,11
6	As part of neighborhood rezoning, expand range of allowable uses within buffer residential areas.	City: Planning	2-5 Years	4,10,11
7	Allow for higher density residential adjacent to commercial development.	City: Planning	2-5 Years	4,5,6,10,11,12
8	Establish an identity for public signage throughout corridor.	City: Planning and ED Business District	2-5 Years	1,2,3
9	Publish a Military Avenue urban design and streetscape reference handbook illustrating recommended guidelines and providing references, case studies and financial resource information.	City: Planning and ED Business District	2-5 Years	1,2
10	Create a guidebook showing simple strategies for enhancing traditional facades including awnings, cornices, building entrance treatments, etc.	Business District City: ED and Planning	2-5 Years	1,2
11	Develop a façade improvement program for existing businesses and facilities to promote revitalization of structures within the corridor.	Business District City: ED and Planning	2-5 Years	1
12	Enforce maintenance of vacant lots and structures.	City: Planning and Inspection	Ongoing	1
13	Utilize sign ordinance to ensure that ingress/egress points are clearly marked and destinations are clearly indicated on wayfinding signage.	City: Planning and DPW	Ongoing	1,4,8,9
14	Incorporate green buffers and landscaped islands within parking lots.	Developers, Property Owners	Ongoing	1,2,4,8



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## Action Items

## Category: Organizational Development and Branding

	Prescribed Action	Responsible Parties	Time Frame	Goal Reference
1	Determine boundaries for Business Improvement District.	City: ED and Planning Business District	1-2 Years	2
2	Recruit Business Improvement District board candidates and elect board.	City: ED and Planning Business District	1-2 Years	2
3	Establish additional property tax assessment rate for the Business Improvement District.	City: ED and Planning Business District	1-2 Years	2
4	Convene stakeholder group to identify a key message for the District and establish District imagery and identity.	Business District	2-5 Years	2
5	Work with local advertising/publishing companies via ad buys to create discounted ad structure for corridor businesses.	Business District	2-5 Years	2
6	Carry identified branding and messaging through to streetscape elements and wayfinding signage.	City: ED Business District,	2-5 Years	1,2
7	Introduce gateway features or monument signage at primary entry points to the District.	City: Planning and ED Business District	2-5 Years	3
8	Create stronger connections to USH 41 at Mason Street, Shawano Avenue, and Lombardi Avenue.	City: Planning and ED Business District	2-5 Years	3,6,9
9	Initiate one or more annual community events to be held on the corridor to encourage outsiders to become familiar with the corridor.	Business District, City: ED, and Chamber	Ongoing	2
10	Work with local organizations to promote the corridor and capitalize on existing visitors in the area.	Business District, City: ED, and Chamber	Ongoing	2

## Action Items

## Category: Complete the Street

	Prescribed Action	Responsible Parties	Time Frame	Goal Reference
1	Identify gaps in street tree coverage and identify sites for tree replacement.	City: DPW and Parks Business District	1-2 Years	1
2	Develop phased street improvement plan to provide pedestrian elements including trees, landscaping beds, street furniture, wayfinding and pedestrian lighting.	City: DPW, Planning, ED and Parks Business District	2-5 Years	1
3	Identify barriers to pedestrian circulation between and within existing retail centers (fences, unbroken rear walls, etc).	City: Planning, ED, and Planning	2-5 Years	8,9
4	Create pedestrian circulation plan capitalizing on existing trail and sidewalk networks present in adjacent neighborhoods.	City: Planning and Parks	2-5 Years	8
5	Identify grant funding appropriate to complete missing regional trail linkages, particularly along unused rail lines.	City: Planning, Parks and ED Business District	2-5 Years	1,8
6	Add bicycle lanes and sidewalks north of Dousman and south of Langlade.	City: DPW, Planning	2-5 Years	8
7	Install additional, appropriately designed bike racks to support bicyclists.	City: DPW Business District	Ongoing	8
8	Explore means of slowing traffic near automobile/pedestrian interaction areas (i.e. raised crosswalks over driveways, pathways through parking lots, visible bike racks & pedestrian amenities).	City: DPW and Planning Business District	Ongoing	8,9
9	Develop a provision for pathways from sidewalks to business entrances and between businesses in same/adjacent centers.	City: Planning Developers	Ongoing	4,8
10	Install/mark pedestrian pathways between sidewalks and business entrances.	Developer	Ongoing	1,2,4,8



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Action Items				
Category: Business Recruitment				
	Prescribed Action	Responsible Parties	Time Frame	Goal Reference
1	Identify current vendors/suppliers/partners of hospital and existing medical users.	Business District	2-5 Years	12
2	Aid in assembling parcels at key intersections to create suitable size parcels for large-scale redevelopment.	City: ED Business District	2-5 Years, Ongoing	5,6
3	Market redevelopment sites to developers and national retailers meeting identified unmet demand sectors.	City: ED Business District Chamber	Ongoing	5,6
4	Attract anchor retailers and mixed-use developers to partner with local stakeholders on projects.	City: ED Business District	Ongoing	5,6
5	Identify locations for medical-oriented retail and service providers.	City: Planning and ED Business District Chamber	Ongoing	12
6	Determine future space needs of vendors/suppliers/partners of hospital and existing medical users.	City: ED Business District Chamber	Ongoing	12
7	Create marketing materials promoting the viability of Military Avenue as a location tailored to target groups/companies .	Business District	Ongoing	2,4
8	Identify existing businesses with similar clientele and encourage cross-marketing.	Business District City: ED Chamber	Ongoing	5,6
9	Identify existing businesses that serve as vendors/clients for existing successful Military Avenue tenants and recruit these businesses to Military Avenue.	Business District City: ED	Ongoing	5
10	Target complementary retail and service businesses meeting identified supply gaps for co-tenancy.	City: ED Business District Chamber	Ongoing	6
Action Items				
Category: Business Retention				
	Prescribed Action	Responsible Parties	Time Frame	Goal Reference
1	Work with existing firms to develop suitable small provider spaces to allow successful firms to upgrade space and remain on Military Avenue.	City: ED Business District Chamber	2-5 Years	5,6,10
2	Coordinate with the SBA, SBDC, Technical College and other logical entities to offer marketing, business planning and other support to existing small businesses.	Business District Chamber City: ED	Ongoing	4
3	Continue to update and publicize database of available spaces to encourage firms with changing space needs to remain or located within the district.	City: ED Business District Chamber	Ongoing	4,5
4	Identify existing businesses with similar clientele and encourage cross-marketing.	Business District City: ED Chamber	Ongoing	5,6
5	Identify existing retailers interested in upgrading to new high quality location.	City: ED Business District	Ongoing	4,5,6,10

## Action Items

## Category: Key Redevelopment Sites

	Prescribed Action	Responsible Parties	Time Frame	Goal Reference
1	Utilize tax increment finance (TIF) dollars to acquire and assemble parcels in key redevelopment sites, and attract anchor retailers that would benefit the corridor.	City: ED & Planning Business District	2-5 Years and Ongoing	4,5,10
2	Consider creating new TIF district for the Military Avenue/Lombardi Gateway and Hospital areas when redevelopment opportunities arise.	City: ED and Planning Business District	5-10 Years	6,10
3	Identify parcels and redevelopment projects that could be eligible for grant funding sources such as brownfields or WHEDA tax credits.	City: ED Business District, WHEDA	10+ Years	5,6,10
4	Work with developers to identify property types suitable for target redevelopment projects.	City: ED-Planning	Ongoing	4,5,6,10
<b>Hospital Corridor</b>				
5	Conduct hospital worker & visitor intercept survey to determine gaps in area amenities.	Business District	2-5 Years	10,12
6	Identify amenity gaps for these specific population sub-groups. Likely sectors include restaurant, medical supply, gifts and lodging.	Business District	5-10 Years	10,12
7	Identify locations suitable for growth and encourage suitable development as market conditions warrant.	City: ED Business District Chamber	Ongoing	5,10,12
8	Based on identified gaps in amenities and site availability, work to recruit additional retail or service amenities to the area.	City: ED Business District Chamber	Ongoing	4,5,12
<b>Former Cub Foods Site</b>				
9	Obtain rights to adjacent parcels as they become available to assemble suitably sized redevelopment opportunity.	City: ED Business District	2-5 Yeeears	1,6
10	Require a master-planned development with shared circulation and parking as well as pad site development to enhance Military Avenue frontage.	City: ED and Planning Business District	2-5 Yeeears	1,6,8,9,10
<b>Green Bay Plaza</b>				
11	Work with existing property owner to encourage increased site density through outlot development incorporating a mix of uses.	City: ED and Planning Property Owner	2-5 Years	6,10
12	Work with existing property owner to encourage improvements to property including façade facelifts, parking lot improvements, and other public space amenities.	City: ED and Planning Business District Property Owner	2-5 Years	1,8,9
<b>9th Street Intersection</b>				
13	Rezone specific sites to allow for mixed-use development.	City: Planning	2-5 Years	1,6
14	Obtain rights to parcels as they become available to assemble significant sized redevelopment opportunity.	City: ED	Ongoing	5,6



## Lombardi Gateway

15	Construct a pedestrian/bicycle overpass at Military Avenue/Marlee Lane that safely facilitates north/south connectivity over Lombardi Avenue.	City, Brown County, WisDOT	5-10 Years	2,3,8
16	Work with the Green Bay Packers and the Village of Ashwaubenon to coordinate and maximize future development	City: ED, Planning, Common Council, Business District, Chamber	Ongoing	3,5,6
17	Work toward a compatible and complementary business mix between the Military Avenue and the Lombardi Avenue corridors.	City: ED, Planning, Business District, Chamber	Ongoing	3,5,10
18	Coordinate the quality of design between Military Avenue and Lombardi Avenue identifying and implementing complementary and supportive design elements.	City: ED, Planning Business District	Ongoing	1,3,5