



September 13, 2018

Tom Harrigan
Zoning & Planning Administrator
13600 Juneau Blvd
Elm Grove, WI 53122

via email: tharrigan@elmgroviewi.org

re: Senior Housing Zoning Research
Surface Parking Requirements; Building Footprint; Minimum/maximum unit sizes

Dear Tom,

Thank you for the opportunity to assist in researching senior housing characteristics for the proposed RM-2 district. After the last Legislative Committee meeting, you requested research demonstrating surface parking, building footprint, and minimum and maximum unit square footages for senior housing. As you know, we previously submitted materials in July demonstrating density and parking ratios for a number of successful senior housing projects. For consistency, we utilized the same projects to present the metrics for surface parking and building footprint ratios.

Parking Ratio Analysis:

The same five projects demonstrate an average surface parking ratio of 0.22, or just over 1 surface stall for every 5 units. The Elm Grove Heights proposal provides additional surface parking, with a ratio of 0.24 surface stalls per unit, or just under 1 surface stall for every 4 units.

Building Footprint Analysis:

The building footprint for these projects covers an average of 33.1% of the total site acreage. At 28%, the Elm Grove Heights proposal covers less of the total site acreage.

The Case Against Minimum and Maximum Unit Sizes:

Horizon's portfolio does contain a general range of square footages that we are happy to share. Our projects typically contain a mix of 1 and 2-bedroom unit types, with 1-bedroom units ranging approximately from 600 sf to 850 sf, and 2-bedroom units ranging from 950 sf to 1,300 sf (we typically

avoid 3-bedroom unit types in senior housing, and occasionally provide 2-bedroom plus den units, which represent the higher end of the 2-bedroom range). We recommend, however, against prescribing minimum and maximum unit sizes in the RM-2 district for two reasons.

The primary driver behind unit sizes is market demand. While household income, rents, and unit sizes for competitors in the primary market area generally inform whether a project should include larger or smaller units, the question really depends on the most ideal unit type for the community. Elm Grove, for example, is a high income community with moderate- to- larger-sized homes. Seniors in this area will be down-sizing considerably and most will have the financial capacity and desire to pay for more space. Not surprisingly, we have seen trends towards larger unit sizes commanding higher rents in similar communities surrounding Milwaukee, Chicago, and the Twin Cities. These market features, however, do not speak for every segment of renters attracted to a senior apartment community in Elm Grove.

Another component of unit sizing relates to how the building lays out on the site. Topography frequently impacts the most ideal building shape, which can lead to segments in every building where smaller units make the most sense. For example, the topography of the land for our Elm Grove Heights proposal lent itself to a U-shaped building where one wing was shorter than the other. Minimum or maximum limitations on unit sizes could make it considerably more difficult to achieve an ideal unit mix for unique segments of the building's footprint.

Avoiding minimum and maximum unit size requirements in the zoning code will lead to more successful projects. We have developed 75 independent senior living projects in 3 states and we almost always have units that deviate from what the typical resident in that market area would desire. Flexibility allows the project to appeal to a broader range of households and ultimately bolsters occupancy.

Thank you in advance for your consideration and please let me know if you have any questions.

Sincerely,

A handwritten signature in black ink, appearing to read 'W. Rutherford', written over a horizontal line.

Will Rutherford,
Development Associate

Elm Grove Heights

Building Footprint Analysis



Project Name	Site Square Footage	Building Footprint	Footprint %
Elm Grove Heights	87,120	24,432	28%

Project Name	Site Square Footage	Building Footprint	Footprint %
Uptown Commons I	35,327	14,340	40.6%
Uptown Commons II	19,776	9,052	45.8%
Cedar Glen	111,731	22,620	20.2%
Riverwalk Place	39,204	15,686	40.0%
Woodfield Village	82,328	22,320	27.1%
Woodfield Village II	65,340	16,444	25.2%
Average			33.1%

Elm Grove Heights
 Parking Ratio Analysis



Project Name	Surface Stalls	Surface Stalls / Unit	Underground Stalls	Total Units
Elm Grove Heights	18	0.24	70	75

Project Name	Surface Stalls	Surface Stalls / Unit	Underground Stalls	Underground Stall Per Unit	Total Units
Uptown Commons I	4	0.10	37	0.93	40
Uptown Commons II	3	0.13	24	1.00	24
Cedar Glen (see note)	36	0.45	80	1.00	80
Riverwalk Place	14	0.20	40	0.57	70
Woodfield Village	17	0.28	61	1.02	60
Woodfield Village II	9	0.18	43	0.88	49
Average		0.223668		0.8984	

NOTE: Cedar Glen Surface Parking is shared with assisted living building next door.

Elm Grove Heights
Density & Parking Ratio Analysis



Project Name	Location	Project Type	Construction	Zoning	Total Parking	Stalls / Unit	Total Units	Site Size (acres)	Units/Acre
Elm Grove Heights	Elm Grove, WI	Independent Senior Living	3 and 4-story residential	Current Zoning: B-3	88	1.173	75	2.000	37.5

Horizon Projects

Project Name	Location	Project Type	Construction	Zoning	Total Parking Stalls	Stalls / Unit	Total Units	Site Size (acres)	Units/Acre
Uptown Commons I	Chilton, WI	Independent Senior Living	3 stories residential	Senior Housing PUD	43	1.075	40	0.811	49.3
Uptown Commons II	Chilton, WI	Independent Senior Living	3 stories residential	Senior Housing PUD	24	1	24	0.454	52.9
Cedar Glen	Wauwatosa, WI	Independent Senior Living	3 stories residential	Residential - High Density	117	1.463	80	2.565	31.2
Riverwalk Place	Appleton, WI	Independent Senior Living	3 stories residential	Senior Housing Planned Development Overlay - General Commercial 2	54	0.77	70	0.900	77.8
Woodfield Village	Howard, WI	Independent Senior Living	residential over first floor	Senior Housing PDD	78	1.300	60	1.890	31.7
Woodfield Village II	Howard, WI	Independent Senior Living	3 stories residential	Senior Housing PDD	52	1.06	49	1.50	32.7
Avalon Square	Waukesha, WI	Independent Senior Living; <i>(there are an additional 48 units of assisted living and 27 units of memory care which were not included in density calculation)</i>	3 stories residential over first floor commercial	B-2 Business	Not available	Not available	68	1.830	37.2

AVERAGE STALLS PER UNIT 1.112 AVG UNITS/ACRE 44.7