

Elm Grove Heights

January 7, 2019

Background on Horizon

- **Company Information**

- 34 years of experience
- Experts in senior housing
- Group of companies: Horizon Development Group, Horizon Construction Group, Horizon Management Services
- Long-term interest in project success

- **Experience**

- Developed 78 senior housing projects, with over 4,200 units.
- Local projects in Greenfield, Wauwatosa, Delafield, Milwaukee, Menomonee Falls, and Franklin
- Horizon will manage all aspects of project, from concept to completion and long-term management

Why Senior Living?

- **Seniors want to remain in their communities**
- **There is no independent senior living in Elm Grove**
- **34% of Elm Grove residents are over 64 years old**
 - As of 2000, Elm Grove was 14% ahead of the national average projection for 2030.
- **We have an interest list of 73 seniors already**
 - Over half are from Elm Grove

Typical Resident Population

- **Resident profile across similar properties**
 - 80% single women
 - 10% single men
 - 10% couples
 - 75% still have cars
 - Average Age: 78
 - Average occupancy: 1.12 persons per unit

Resident Age Profile – Woodland Ridge

Property	Units	Below 70	70 - 80	81- 90	>90	Total Residents	Residents Per unit
Crest View	76	11	17	42	14	84	1.1
High Grove	60	8	24	31	9	72	1.2
Hillcrest	40	14	13	9	9	45	1.1
Prairie Hill	69	18	18	28	10	74	1.1
Totals	245	51	72	110	42	275	1.12
Percentages		19%	26%	40%	15%		

Elm Grove Heights

Legend

📍 13040 W Bluemound Rd

Emerald Woods Condominium Association

Pauerlric Manor

13000 Bluemound

📍 13040 W Bluemound Rd

Douglas Plaza

500 Elm Grove Road
Building Trades Association
Northwestern Mutual

18

W Bluemound Rd
N Columbia Blvd

Google Earth

© 2018 Google

300 ft

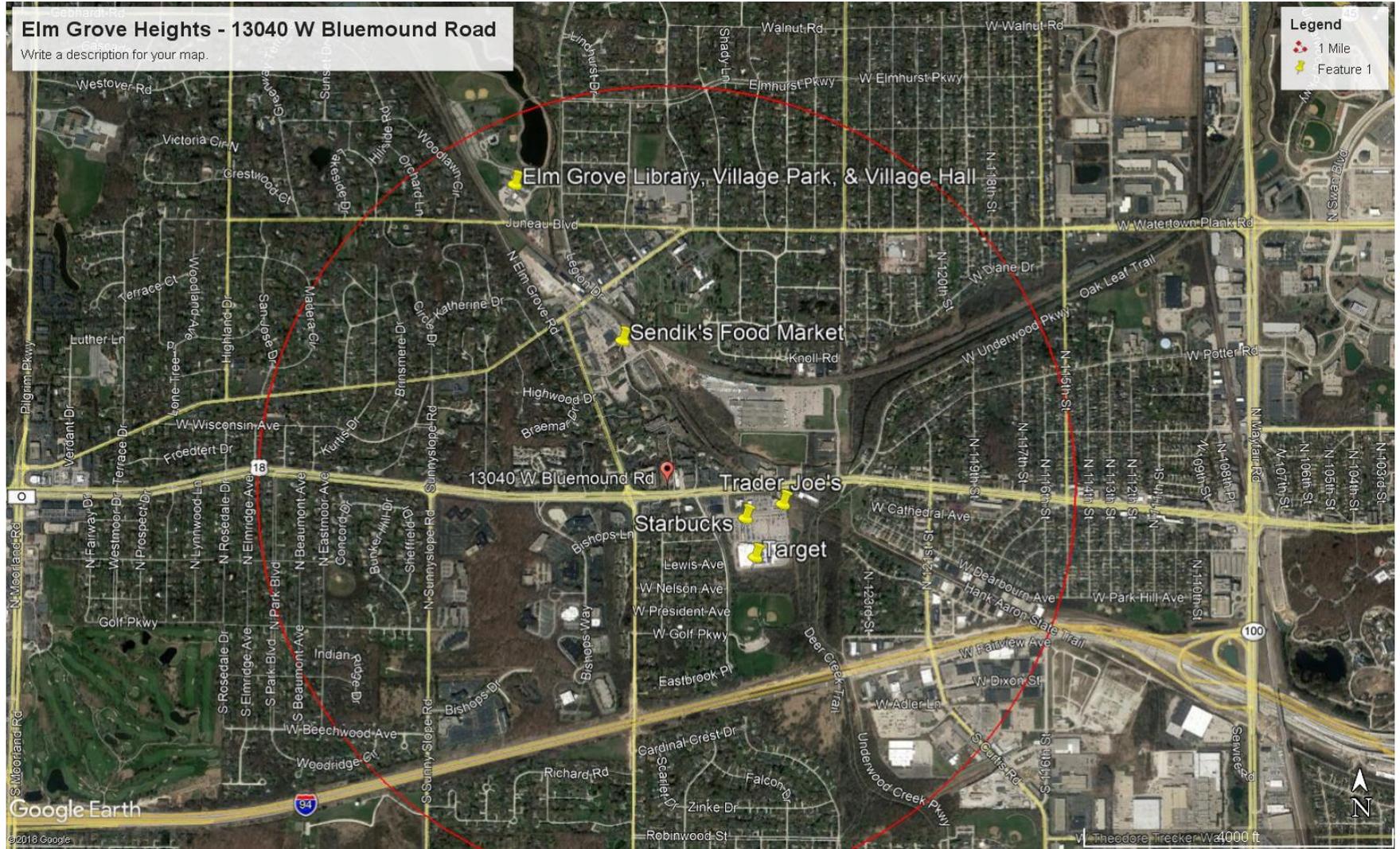


Elm Grove Heights - 13040 W Bluemound Road

Write a description for your map.

Legend

- 1 Mile
- Feature 1



Google Earth

©2018 Google

Proposed Project

- **Elm Grove Heights**

- 75-unit, 3 and 4-story independent senior apartment community (62+)
- Features:
 - Heated underground and surface parking
 - Common area clubroom with kitchen, fitness center, staff office, storage lockers
 - Secured entry
- One and two bedroom unit types with 9' ceilings and luxury finishes, decks and patios
- High quality design and construction
- Fully sprinklered with municipal water supply for safety

Similar Experience

- **Cedar Glen** (opened 2012)
 - Wauwatosa, WI
 - 80-unit, 3-story senior housing
 - Environmental & soil challenges
 - 100% occupied, 2-3 year wait list



Similar Experience

- **Frostwoods I & II (2004)**
 - Monona, WI
 - Frost Woods I – 68-unit, 3-story affordable senior housing
 - Frost Woods II – 51 Units, 3-story market rate senior housing
 - 100% leased with a wait list





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ELM GROVE HEIGHTS
CONCEPTUAL PERSPECTIVE - SE CORNER

DECEMBER 12, 2018



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Concept Site Plan



ELM GROVE HEIGHTS
CONCEPTUAL ARCHITECTURAL SITE PLAN

DECEMBER 17, 2018
SCALE: 1:30



East Elevation – View from Private Drive

- 1 SHINGLE ROOF TYP.
- 2 METAL ROOF
- 3 MASONRY
- 4 GROUND FACE BLOCK
- 5 SIDING



ELM GROVE HEIGHTS
CONCEPTUAL ELEVATIONS

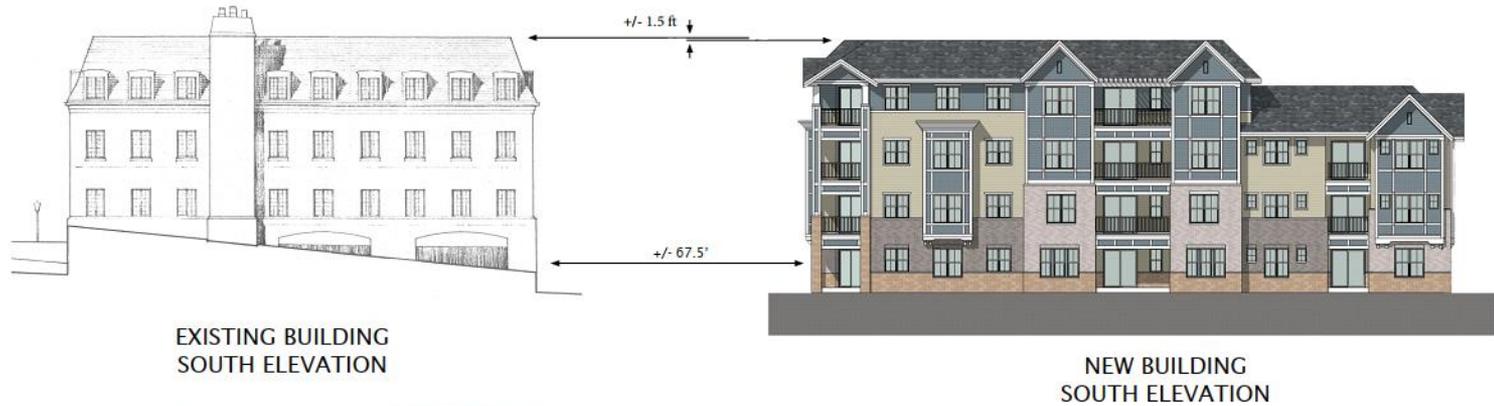
DECEMBER 17, 2018
SCALE: 1:20



South Elevation – View from Bluemound Road



South Elevation – Height Differential



ELM GROVE HEIGHTS
CONCEPTUAL ELEVATIONS

DECEMBER 17, 2018
Scale: 1:20



Elm Grove Road – Site Line



ELM GROVE HEIGHTS
CONCEPTUAL ELEVATIONS

JANUARY 7, 2019
NOT TO SCALE



South Elevation – Perspective



ELM GROVE HEIGHTS
CONCEPTUAL PERSPECTIVE - SW CORNER

DECEMBER 17, 2018





North Elevation – View from Emerald Woods





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CONCEPTUAL PERSPECTIVE - SE CORNER

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Development Benefits

- **Good housing location**
 - Walking distance to downtown
 - Connectivity to nearby amenities – grocery store, senior center, library, park, medical, shopping
 - Public transit stop on site
- **Serves a need in the community for independent senior**
 - Senior population growing
 - Demographic data supports 75+ new units
 - Only independent senior apartment community in the Village.
The closest competitor constructed in 1999
- **Resident benefits in independent senior housing:**
 - Companionship with peers
 - Location and amenities to enhance active lifestyle
 - Low maintenance

Development Benefits

- **Public benefits:**
 - Extension of municipal water from the northeast corner of Bluemound Road to eastern lot line at no cost to the Village
 - Opportunity (but not the obligation) for adjoining owners to hook up to municipal water
 - Installation of a new fire hydrant at the north end of the property
 - Compatible with surrounding uses:
 - Over 18 multifamily-zoned properties within 1,000 feet
 - Building height lower than building to the west by 7 feet.
 - Redevelops vacant lot, generating an estimated \$200,000 in annual property tax revenue with no new burden on the schools
 - Achieves senior housing goals set forth the in the Village of Elm Grove Comprehensive Plan
 - Allows senior home owners to sell their homes and remain in the Village thereby opening up housing for younger families. (34% of Elm Grove residents are over 64 years old)

Woodland Ridge

Legend

Woodland Preserve

Aspens

Hillcrest

Crest View

High Grove

Splinter Hills Ln

Hickory Park

Prairie Hill



W Howard Ave

S 88th St



400 ft

Google Earth

©2018 Google

Traffic & Parking

- **Traffic circulation**
 - Less than one trip per unit per 12-hour period across similar properties in Horizon's portfolio
 - Department of Transportation said they are not at all concerned with adding 75 units of senior housing at this location – they will not require a traffic study
- **Typical Horizon Parking Requirements:**
 - 75 units at 1.1 persons per unit means approximately 83 residents (80% single women, 10% single men, 10% couples)
 - Comparable properties in Horizon's portfolio show 0.88 underground stalls per unit, with 21.2% of those stalls remaining vacant
 - Elm Grove Heights will have 70 underground stalls and we expect at least 14 stalls to remain vacant
 - We will also provide 18 surface stalls (Study shows average of 6.3 spaces occupied on average)
 - Will add 2 surface stalls and bank 6 extra

Resident Age Profile – Woodland Ridge

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Proposed Parking Ratio

- **Elm Grove Heights Parking Ratio**
 - 75 units
 - 70 underground stalls
 - 18 surface stalls
 - 1.173 parking ratio (88/75)
- **Flexibility in Proposed Parking**
 - Willing to add 2 stalls at end of service drive for a new parking ratio of 1.2 (90/75)
 - Willing to bank 6 stalls (net gain of 4) for a final proposed parking ratio of 1.25 stalls per unit

Traffic & Parking

Senior Independent Living Housing Parking Ratio Analysis

Updated: **Monday, December 17, 2018**



Horizon properties and that are fully leased with stabilized occupancies.

Project Name	Res'l Units	Average Age	Surface Parking		Underground Parking						Total Parking		Parking Needed	
			Stall Count	Per Unit	Stall Count	Per Unit	Vacant Stalls	Vac'y %	Occupied Stalls	Occ'y %	Stall Count	Per Unit	Stall Count	Per Unit
Uptown Commons I	40	78	4	0.10	37	0.93	6	16.2%	31	83.8%	41	1.03	35	0.88
Cedar Glen	80	79	26	0.33	83	1.04	11	13.3%	72	86.7%	109	1.36	98	1.23
Woodfield Village	60	77	17	0.28	61	1.02	15	24.6%	46	75.4%	78	1.30	63	1.05
Woodfield Village II	49	76	9	0.18	43	0.88	8	18.6%	35	81.4%	52	1.06	44	0.90
Prairie Hill	69	76	15	0.22	62	0.90	23	37.1%	39	62.9%	77	1.12	54	0.78
Crest View	76	80	25	0.33	47	0.62	9	19.1%	38	80.9%	72	0.95	63	0.83
Hillcrest	40	76	8	0.20	41	1.03	13	31.7%	28	68.3%	49	1.23	36	0.90
Highgrove	60	79	14	0.23	63	1.05	14	22.2%	49	77.8%	77	1.28	63	1.05
Hillside Woods II	60	78	25	0.42	60	1.00	7	11.7%	53	88.3%	85	1.42	78	1.30
Frost Woods I	68	79	32	0.27	64	0.94	15	23.4%	49	76.6%	147	1.24	81	1.19
Frost Woods II	51	80			51	1.00	8	15.7%	43	84.3%			43	0.84
Totals	653		175	0.27	612	0.94	129	21.1%	483	78.9%	787	1.21	658	1.01
Averages	59	77.8	17.5	0.26	55.6	0.94	11.7	21.2%	43.9	78.8%	78.7	1.20	60	1.0
Elm Grove Heights	75		18	0.24	70	0.93					88	1.17		

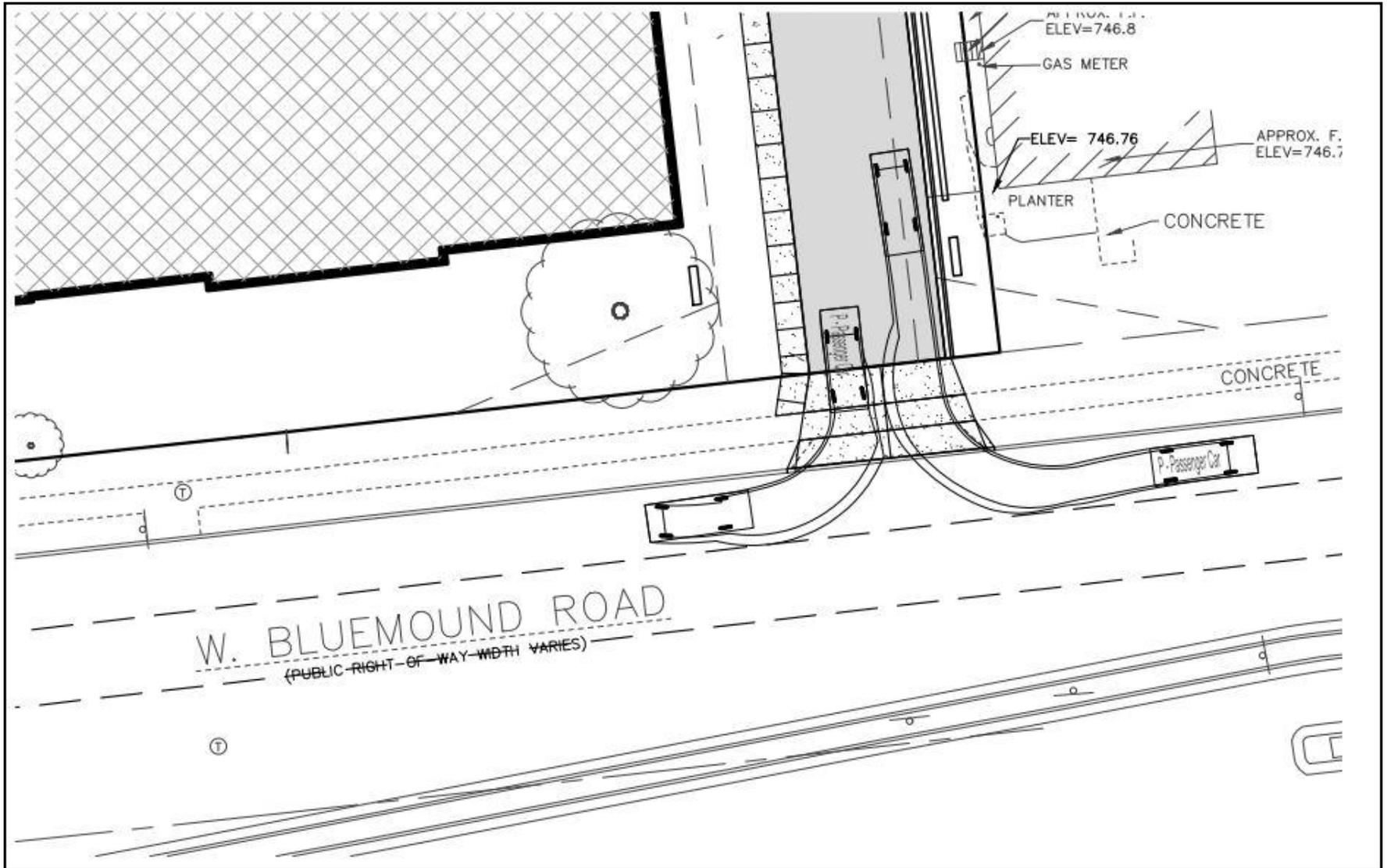
Surface Parking Analysis - Crestview

Day	Date	Average Cars
Tuesday	12/11/2018	7.0
Thursday	12/13/2018	5.4
Friday	12/14/2018	6.4
Saturday	12/15/2018	6.5
Saturday	1/5/2019	6.3
Sunday	1/6/2019	6.9
Average		6.4

Surface Parking Analysis - Crestview

Number of Cars	Times Observed	Percentage
3 Cars	1	3%
4 Cars	7	18%
5 Cars	6	16%
6 Cars	6	16%
7 Cars	6	16%
8 Cars	6	16%
9 Cars	3	8%
10 Cars	3	8%

Auto Safety & Entry



Safety Improvements

- Wider drive improves emergency vehicle access and ingress/egress
 - Striped road
- Stop signs at motor court and garage door
- New entry drive street lighting
- Security camera on driveway entrance
- On-site professional staff
- New fire hydrants at north and south end of property will reduce time to pull fire hose from 15 minutes down to 5 minutes
- DOT will not require a traffic study

Improved Fire Safety





Landscaping & Water

- The existing woods will be retained to preserve natural vegetation and provide screening
- New landscaping on the entry drive will soften the view of the commercial building to the east
- Rain water hitting rebuilt drive will be detained and released slowly
- Site drainage will be retained and released slowly
- Landscaping at main entry will be improved



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Entitlements Timeline

Development Task	Complete By
Concept Review – Plan Commission	May 8, 2018
Concept Review – Building Board	May 15, 2018
Formal Rezoning Request – Board of Trustees	December 17, 2018
Formal Petition Review – Plan Commission	January 7 th , 2019
Formal Petition Review - Building Board	January 16 th , 2019
Review 2 – Plan Commission	February 4 th , 2019
Public Hearing – Board of Trustees	February 25 th , 2019
Public Hearing & Potential Action	March 25, 2019

Construction & Lease-up Timeline

Development Task	Completed By
Start Construction	July 1, 2019
Complete Construction, Commence Lease-up	July 1, 2020
Achieve Stabilization	April 1, 2021

Questions

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