

# Elm Grove Heights

March 4, 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

# 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

# Target Population & Need

- **Resident profile across similar Horizon properties**
  - 80% single women
  - 10% single men
  - 10% couples
  - 75% still have cars
  - Average Age: 78
  - Average occupancy: 1.12 persons per unit
- **Elm Grove Comprehensive Plan calls for additional rental senior housing options in the Village**
  - Over 34% of Elm Grove's population is over the age of 64.

# Entitlements History

- **Formal Request to Re-zone to Board of Trustees**
  - December 17, 2018
  - Board granted unanimous approval to proceed with re-zoning process
- **Plan Commission's 1<sup>st</sup> Consideration of Formal Request**
  - January 7, 2019
  - Plan Commission granted unanimous preliminary approval
    - Plan Commission asked developer to address:
      - Extraordinary event surface parking;
      - Provide market rate-specific parking data for comparable properties;
      - Fire Department turnaround exhibit w/r/t Village Engine's;
  - Referred project to Building Board to evaluate Elm Grove Heights design and exterior material quality with respect to the enhanced density standard

# Entitlements History Continued.

- **Building Board**
  - January 16, 2019
  - Building Board unanimously approved Elm Grove Heights' quality of design, exterior materials, and landscape plan with respect to the enhanced density standard.

# Meeting Purpose

- **Request**

- Horizon is asking for the Plan Commission's recommendation to approve the request to re-zone 13040 W Bluemound Road with a Planned Development Overlay to accommodate the development of Elm Grove Heights.
- We are requesting approval **subject to** final approval of the civil engineering plans by the Village Engineer and Village staff

# February 12<sup>th</sup> 2019 Submittal

- **Addressed Plan Commission Discussion on January 7<sup>th</sup> 2019**
  - Amended Re-zoning Request:
    - Setbacks;
    - Parking;
  - Amended civil and architectural documents demonstrating unit sizes and updated parking ratios;
  - Market Rate Housing Parking Statistics;
  - Extraordinary Event Parking Plan;
  - Fire Department Turnaround;

# March 4<sup>th</sup> 2019 Submittal

- **Addresses Plan Commission Discussion on January 7<sup>th</sup> 2019 AND the Village Engineering Review**
  - Amended Re-zoning Request:
    - Setbacks;
    - Parking;
  - Amended civil and architectural documents demonstrating unit sizes and updated parking ratios;
  - Market Rate Housing Parking Statistics;
  - Extraordinary Event Parking Plan;
  - Fire Department Turnaround;

# Setbacks

- **December 17<sup>th</sup>**
  - Western Setback: 13.38'
- **February 12<sup>th</sup>**
  - Western Setback: 14.33'
- **March 4<sup>th</sup>**
  - Western Setback: 15'
  
- **Requesting Flexibility under PDO**
  - Base standard is 20'

# Parking

- **December 17th**
  - 70 underground;
  - 18 surface stalls;
  - 1.173 to 1 ratio (88 stalls/75 units)
- **February 12<sup>th</sup> Submittal**
  - Added one additional underground stall – 71 underground;
  - 18 surface stalls;
  - **New ratio of 1.186 stalls per unit**
    - **Code requires 1.1 stalls per unit**
  - Also offered banked parking solution – if installed, would create 14 additional surface stalls;
    - Would create overall parking ratio of 1.37 stalls per unit (32 surface stalls + 71 underground = 103 stalls/75 units)
  - Submitted Extraordinary Event Parking Plan
  - Submitted Market Rate Only Parking Statistics
- **March 4th**
  - Parking ratio is identical;
  - Extraordinary Event Parking Plan was amended

# Market Rate Senior Parking Statistics

- **Elm Grove Heights Parking Request**
  - 1.186 without banked parking
  - 1.37 with banked parking
- **Horizon Market Rate Properties**
  - 1.14 spaces per unit
  
- **Improved the Extraordinary Event Parking Plan**

# Extraordinary Event Parking Plan

- **March 4<sup>th</sup> Update**
  - **Parking Agreement with Building Trades Association**
  - Thanksgiving, Christmas Eve, Christmas, Easter, Father's Day, and Mother's Day
  - Adds 27 surface stalls on Building Trade's Association

# 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

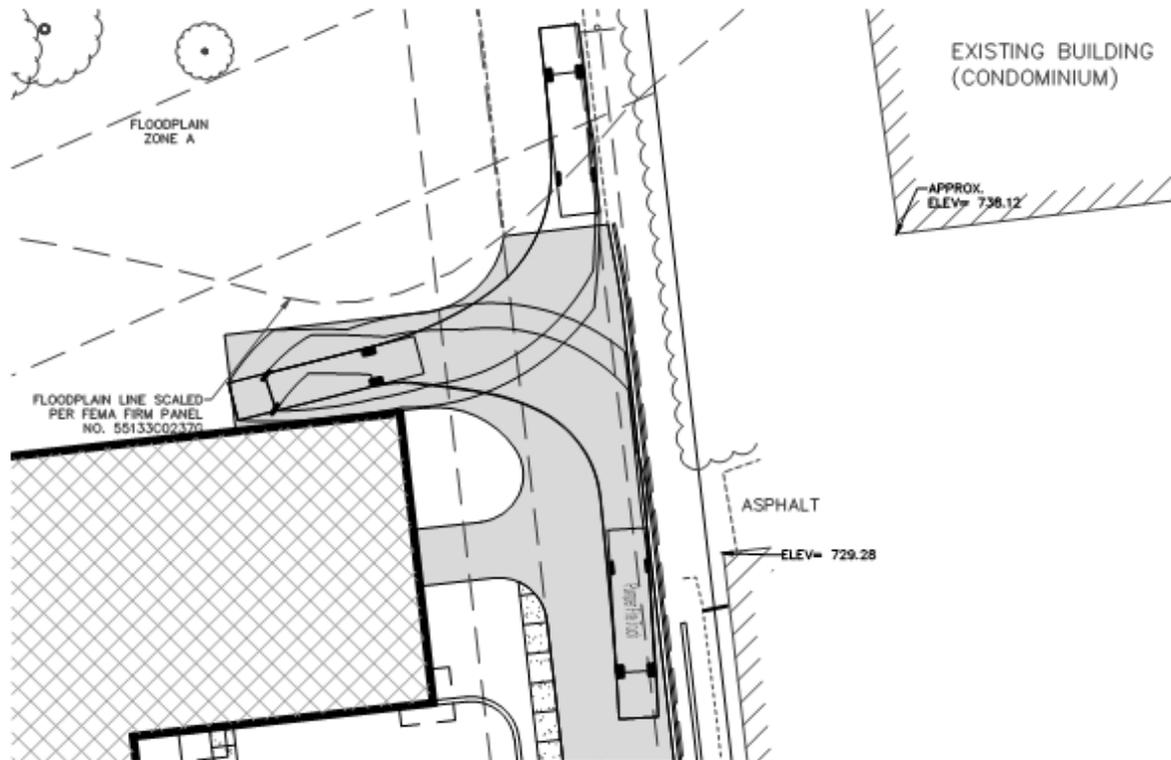
Google Earth

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300 ft



# Fire Department Turnaround Appendix 9



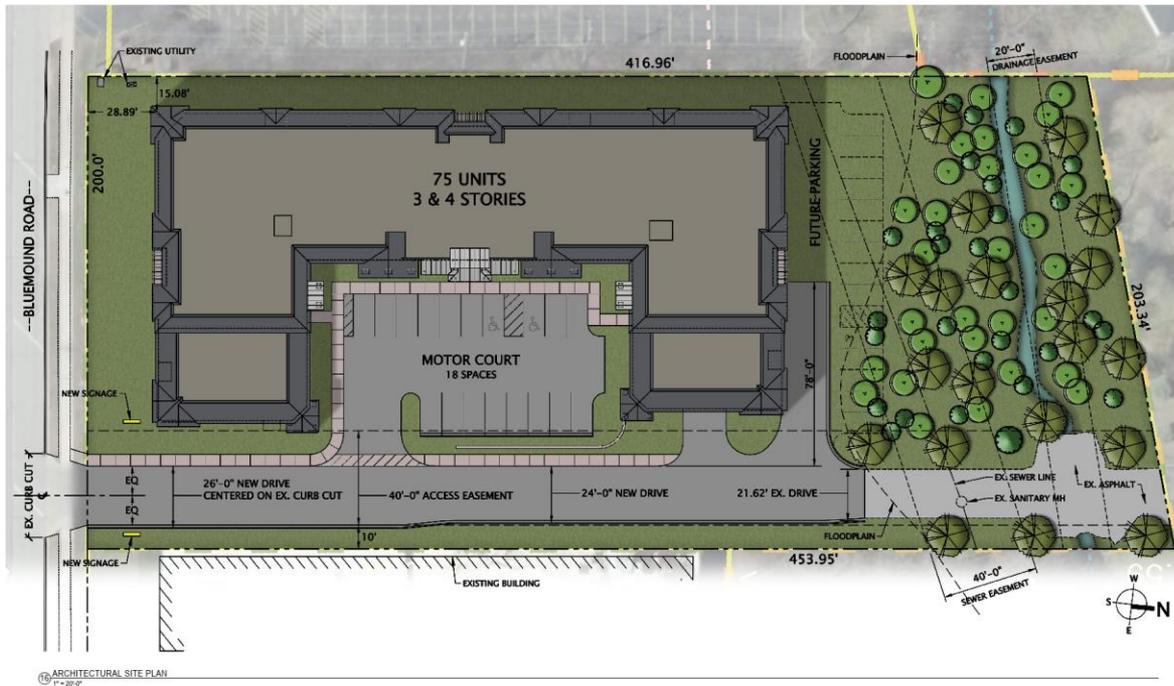
# Senior Housing Deed Restriction

- Requirement for a 62+ deed restriction will be added to final development agreement

# Construction Sequence Access Plan for Emerald Woods

- **Will maintain access for Emerald Woods throughout construction**

# Concept Site Plan



**JLA**  
ARCHITECTS

MADISON : MILWAUKEE  
jla-ap.com

JLA PROJECT NUMBER: 18-0402



ELM GROVE HEIGHTS

PROGRESS SET

**PROGRESS DOCUMENTS**

These documents reflect progress and intent and may be subject to change. Including additional detail. These are not final construction documents and should not be used for final bidding or construction-related purposes.

DATE OF ISSUANCE: MARCH 4, 2019

REVISION SCHEDULE

Item	Description	Date

SHEET TITLE

ARCHITECTURAL SITE  
LAYOUT PLAN

SHEET NUMBER

ASP-100



# Village Engineer Sanitary Capacity & Unit Mix

- **December 17th**
  - 22 one bedrooms and 53 two bedrooms
- **March 4<sup>th</sup>**
  - 24 one bedrooms and 51 two bedrooms
- **Revised Plan**
  - Fewer bedrooms generate lower sewage potential

# Height & Front-yard Setbacks Discussion from Engineering Review

- **Building Height**
  - Base restriction: 36'
  - Elm Grove Heights: 51'6"
- **Front-yard Setbacks**
  - Base restriction: 25'
  - Elm Grove Heights: 27.67'
- **Side-yard Setbacks**
  - Base restriction: 20'
  - Elm Grove Heights: 15'

# Signage Discussion from Engineering Review

- **Engineering Review**
  - One sign per lot
- **That portion of the code applies to nonresidential districts**
  - Village staff has confirmed that two signs meets code in an Rm-2 district



**JLA**  
ARCHITECTS



**ELM GROVE HEIGHTS**  
CONCEPTUAL PERSPECTIVE - SE CORNER

DECEMBER 12, 2018



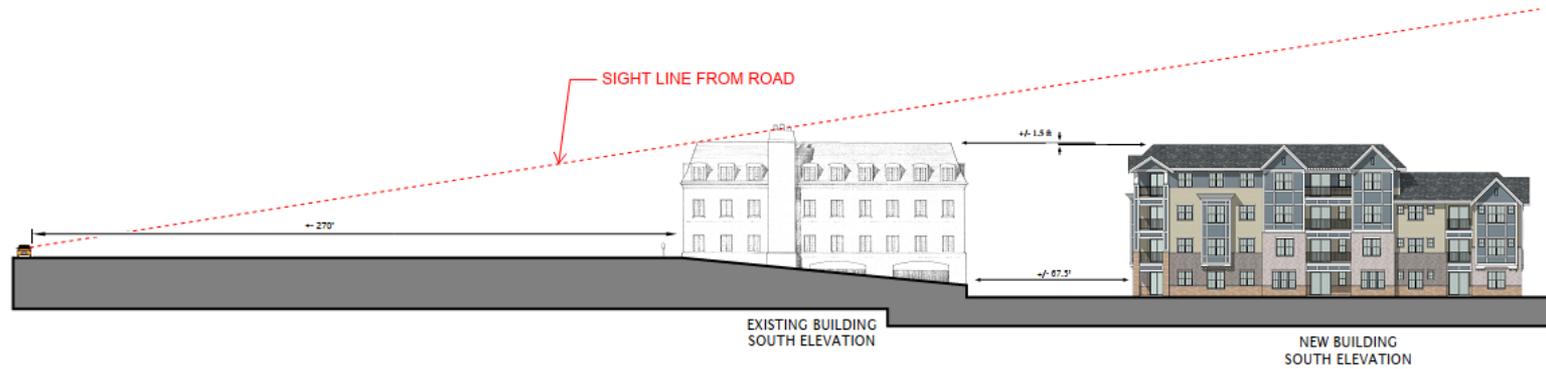
# Entitlements Timeline

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 <sup>th</sup> , 2019
Formal Petition Review - Building Board	January 16 <sup>th</sup> , 2019
Review 2 – Plan Commission	March 4 <sup>th</sup> , 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

# Elm Grove Road – Site Line



ELM GROVE HEIGHTS  
CONCEPTUAL ELEVATIONS

JANUARY 7, 2019  
NOT TO SCALE



Senior Independent Living Housing  
Market Rate Parking Ratio Analysis

Updated: Tuesday, February 12, 2019



Horizon properties and that are fully leased with stabilized occupancies.

Appendix 7 (Amended)

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
Bell Tower Place	40	78	19	0.48	23	0.58	2	8.7%	21	91.3%	42	1.05	40	1.00
The Woodlands	42	83	20	0.48	28	0.67	0	0.0%	28	100.0%	48	1.14	48	1.14
Villa Ciera	71	82	36	0.51	41	0.58	0	0.0%	41	100.0%	77	1.08	77	1.08
The Pines	46	81	9	0.20	46	1.00	12	26.1%	34	73.9%	55	1.20	43	0.93
Willard Haus	47	75	20	0.43	19	0.40	1	5.3%	18	94.7%	39	0.83	38	0.81
Highgrove	60	79	14	0.23	63	1.05	14	22.2%	49	77.8%	77	1.28	63	1.05
Hillside Woods I	60	79	22	0.37	31	0.52	3	9.7%	28	90.3%	53	0.88	50	0.83
Hillside Woods II	60	78	26	0.43	60	1.00	7	11.7%	53	88.3%	86	1.43	79	1.32
Frost Woods II	51	80	16	0.31	51	1.00	8	15.7%	43	84.3%	67	1.31	59	1.16
Totals	477		182	0.38	362	0.76	47	13.0%	315	87.0%	544		497	1.04
Averages	53	79.4	20.2	0.38	40.2	0.75	5.2	11.0%	35.0	89.0%		1.14	55	1.0
Elm Grove Heights	75		32	0.43	71	0.95					103	1.37		

Conclusions:

1. The surface parking ratio for existing properties is .38 spaces per apartment, whereas Elm Grove Heights will provide up to .43 spaces per apartment. (18 motor court plus 14 banked spaces = 32 parking spaces)
2. The comparable properties have .75 underground parking spaces per unit, whereas Elm Grove Heights will have .93 spaces per unit.
3. Overall parking is 1.14 spaces per unit at the comparables, whereas Elm Grove Heights will have up to 1.37 parking spaces per unit.
4. Based on the comparables, considering vacancy in the underground parking, the overall parking ratio required is 1.0 spaces per apartment.



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
<b>Totals</b>	653		175	0.27	612	0.94	129	21.1%	483	78.9%	787	1.21	658	1.01
<b>Averages</b>	59	<b>77.8</b>	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
<b>Average</b>		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%

# 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%		

# Questions

**Philip Schultz**

**[p.schultz@horizondbm.com](mailto:p.schultz@horizondbm.com)**

**414-727-2620**

**Will Rutherford**

**[w.rutherford@horizondbm.com](mailto:w.rutherford@horizondbm.com)**

**608-354-0843**