



April 14, 2020

Ms. Jennifer Andrews
City of Waukesha Community Development Dept.
201 Delafield Street, Room 200
Waukesha, WI 53188

via Email: jandrews@waukesha-wi.gov

RE: Rezoning Request and Planned Unit Development Request
Springhouse Waukesha
200 Delafield Street

Dear Jennifer,

Please accept this Rezoning Request and Planned Unit Development Request for the above referenced project. This letter is intended to supplement the preliminary site and architectural plans submitted on April 2, 2020.

Rezoning Request

The project is requesting re-zoning to RM3 Multi-family Residential District with PUD Planned Unit Development Overlay. The PUD Overlay District will allow for flexibility of the overall development design, benefitting both the City of Waukesha and the developer, while maintaining standards of the RM3 Multi-family Residential District where possible.

Overall Development Details

The 5.5-acre property will be redeveloped in three separate phases. The attached land use map illustrates the development intent, with Phase I (middle) being senior independent housing and adjoining parcels developed to include future multi-family housing (north) and future commercial (south). Each development will have its own parcel, as identified on a forthcoming draft Certified Survey Map (CSM). The CSM will have two lots, one for Phase I and one for the north site. The commercial site boundary will remain unchanged. Both the commercial and future multi-family projects are not yet designed and do not yet have specific timelines. Commercial development will be managed by Luther Group of Elm Grove, Wisconsin and residential development will be managed by Horizon Development Group of Madison, Wisconsin, both of which were selected as the development team through the City's RFP process.

Phase I Development Details

Horizon is proposing to develop a 78-unit senior market rate housing community. The facility will be situated on 2.00 acres of land and feature 3-story, wood frame construction with full underground parking. The building will feature a mix of one-, two-, and three-bedroom unit layouts; the current design includes thirty six (36) one-bedroom, thirty six (36) two-bedroom, and six (6) three-bedroom units, with each unit including a full kitchen, private patio or balcony, individually controlled heating and cooling, in-unit washer and dryer, and attractive finishes. Residents will have access to a variety of common amenities and conveniences within the building, including a trash chute, storage lockers,

package delivery room, exercise room with equipment, resident lounge, two-story grand clubroom with views of the courtyard, and heated, secure underground parking. Outdoor spaces will include a lounge area with fire pit, built-in grill with table seating, gazebo structure with seating, walking paths, possible dog run, and an exercise area that could include pickleball, yoga, outdoor dancing events, or other programs to be determined.

The building exterior will be comprised of approximately 15-20% masonry (brick) with Hardi or LP Smartside siding. Traditional pitched roof design will be utilized to complement surrounding residential uses and maintain consistency with neighborhood preferences.

Two vehicular access points serve the proposed development. The main access point was aligned with/centered on the Buena Vista intersection. This access point serves the main parking lot and accessible building entrance. The second access point is for underground parking and non-emergency parking/loading, located on the south end of the building. Non-emergency parking was requested by the City of Waukesha Fire Department, and this location was decided as it could also serve delivery and moving functions to support residents.

Rationale for Rezoning

The site is currently zoned B-3 General Business District. The rezoning request is being made to accommodate redevelopment to and the intended use of multi-family housing. This use aligns with the City's comprehensive plan and is further described in the PUD Planned Unit Development petition.

Rezoning Form

Please see attached rezoning form, to be signed by the City of Waukesha as property owner.

Conceptual Plan

Preliminary site and architectural plans were submitted for City review on April 2, 2020 and are attached to this letter.

Planned Unit Development

Relationship to City's Planning Objectives

The 2012 Central City Master Plan suggests residential, commercial, or mixed-use projects are ideal for the proposed location. The plan suggests residential uses could benefit from elevated views in the area. The three-story, 78-unit concept aligns with this goal, and future commercial planned for other areas of the site brings the product diversity and additional value to the site. The project also helps address housing needs discussed in the 2019 City of Waukesha Housing Study. The report identifies a high percentage (46%) of community members that indicate a need for more senior housing. Landlords interviewed indicate that "lots of seniors are looking to rent. Many of them can be considered low income." Therefore, it is prudent to consider high quality senior living with an awareness that other product types, such as affordable senior housing, could also be supported. Lastly, the City's comprehensive plan (Chapter 5) identifies strategic planning goals to advance housing initiatives. Two of these goals are:

1. Promote the development of housing for residents of the City of Waukesha that provide a range of housing choices that meet the needs of persons of all income levels and age groups and persons with special needs.
2. Promotion of the redevelopment of lands with existing infrastructure and public services and the maintenance and rehabilitation of existing residential, commercial, and industrial structures.

The general housing issue identified was the need for a variety of housing choices; sufficient housing choices are important as the population ages and needs change. The proposed senior housing project will help address this community need while redeveloping City owned property with existing infrastructure and services.

General Character of Uses

The proposed PUD area will include the middle and north sites for redevelopment. Both of these areas will feature multi-family residential development. Phase I will be a 3-story, 78-unit senior housing development. The future residential phase, also covered under the proposed PUD area, is not yet planned but has been discussed as lower density residential development as the property transitions to one- and two-family households further to the north. Please see attached site and architectural plans for illustrations of design and building character for the Phase I development.

Total Area Included in PUD

The proposed PUD area includes two lots. The Phase I development area consists of 2.00 acres, and the north property includes 1.87 acres. Together, the combined PUD area is 2.00 acres plus 1.87 acres, or 3.87 acres.

Phase I Development

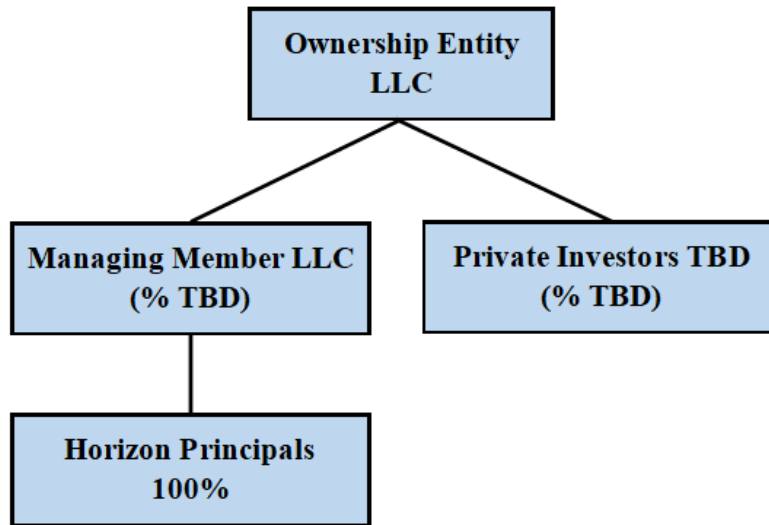
Lot Area:	2.00 acres
Building	0.71 acres (35%)
Parking	0.25 acres (13%)
Landscape	1.04 acres (52%) – grass, landscape areas, sidewalks, amenities
Proposed Dwellings:	78 apartment units
1-bedroom	36
2-bedroom	36
3-bedroom	6
Total Parking Provided:	104 spaces
Structured:	78
Surface:	26
Target Demographic:	Senior 55+, Market Rate
Building Type:	3-story, wood frame, pitched roof with lower level parking

Estimated Project Value

The Phase I development (78-unit, 3-story, market rate senior housing) has an estimated value of \$9,037,000. The project value of the future residential phase will be estimated when a specific concept is developed, and modeling is completed.

Organizational Structure

Each project phase will have separate ownership. A single-purpose limited liability company will be formed, with a general structure as illustrated below. The property will be managed by Horizon Management Services, Inc. (HMS). HMS has nearly 3,000 units in its management portfolio, many of which are senior housing and are located in the greater Milwaukee area.



Proposed Departures from RM3 Zoning

Proposed departures from RM3 standards of development as set forth in the City’s zoning regulations are as follows:

1. Section 22.32 (4)(f) Conditional Uses – Housing for the elderly is an approved conditional use provided that the density of the housing does not exceed 22 units per acre. The proposed 78-unit development will be situated on a 1.99-acre lot, which is a proposed density of 39.2 units per acre. The proposed development is located on an urban infill lot and does not exceed senior housing density in other similar locations.
2. Section 22.32 (5)(a) Lot Area and Widths – Minimum lot area for multi-family housing is defined by 2,500 square feet per one-bedroom unit, 3,000 square feet per two-bedroom unit, and 3,500 square feet per three-bedroom unit. Applying the proposed unit mix of 36 one-bedroom units, 36 two-bedroom units, and 6 three-bedroom units to this methodology, the minimum lot size is 219,000 square feet or 5.03 acres. The proposed lot size of 86,848 square feet (1.99 acres) yields smaller per unit minimums of approximately 991 square feet per one-bedroom unit, 1,190 square feet per two-bedroom unit, and 1,388 square feet per three-bedroom unit. The lot size of 1.99 acres and resulting per unit minimums are appropriate for an urban infill location for three-story, multi-family housing.
3. Section 22.32 (6)(a) Building Height – No principal building or part of a principal building shall exceed 40 feet in height. The proposed 78-unit, 3-story building will not exceed 65 feet in height. Flexibility is required to accommodate required floor to floor heights, pitched roof design, and the underground parking level (south elevation).
4. Section 22.32 (7)(a) – There shall be minimum street yard setback of twenty-five (25) feet from any street right-of-way. The proposed development will require flexibility and will maintain a street yard setback of not less than ten (10) feet.
5. Section 22.32 (7)(c) – There shall be a rear yard of not less than forty-five (45) feet. The proposed development will require flexibility and will maintain a rear yard of not less than twenty-five (25) feet.

General Development Plan

Please see attached preliminary site and architectural plans for an overview of the General Development Plan features, including the following based on City of Waukesha requirements:

1. Location of driveways, sidewalks, curbs and parking facilities;
2. Size and location of building;
3. Location of open space specific to the development site;
4. Type, size, and location of all structures – please note there are no rooftop mechanicals planned, each unit will have an individual HVAC unit;
5. Landscape and screening plans;
6. Lighting plans for parking lots, security, and driveways;
7. Architectural plans, elevations, and perspective drawings illustrating the design and character of the proposed structure;
8. Utility plan, including sanitary sewer, storm sewer, water, and gas;
9. Proposed location of utility easement for electric;
10. Existing topography with no greater than two-foot contours;
11. Anticipated uses of adjoining lands; and
12. Characteristics of soils – a geotechnical study is currently in progress on this site. Field work has been completed and data currently being processed for a final report. This report will contain specific recommendations for footing/foundations based on soil composition and groundwater testing.

Expected Date of Commencement

Project design is progressing and is now being reviewed by the City of Waukesha. Our goal is to begin construction on the project in late summer or early fall 2020 and complete in approximately 12 months. Senior housing tends to be very seasonal, with spring and summer months historically being the most active times for seniors to move. Although we are pushing for the project to begin in 2020, if delays are encountered such that construction cannot start until late fall or winter 2020, opening the building the same time a year later puts the project in a difficult leasing position. In that case, we would recommend starting construction in late winter 2021. That said, we have a schedule in place and a design team that is ready to go (pending City design review) to execute a 2020 construction start.

Project Team

- Applicant/Developer: Horizon Development Group, Inc. – Scott Kwiecinski
5201 East Terrace Drive, Suite 300
Madison, WI 53718
- Architect: Knothe Bruce Architects – Kevin Burow
7601 University Avenue, Ste 201
Middleton, WI 53562
- Civil Engineer: Pinnacle Engineering – Aaron Koch
20725 Watertown Rd., Suite 100
Brookfield, WI 53186
- General Contractor: Horizon Construction Group, Inc. – Mick Hintz
5201 East Terrace Drive, Suite 300
Madison, WI 53718
- Property Manager: Horizon Management Services, Inc. – Becky Hildebrandt
5201 East Terrace Drive, Suite 300
Madison, WI 53718

Please contact us if you have any questions or require additional information. Thank you in advance for your review, and we look forward to establishing a meeting date to discuss feedback.

Respectfully submitted,

Horizon Development Group, Inc.

Scott J. Kwiecinski
Development Manager