

Wednesday, May 8, 2019

City of Madison
Planning Division
Madison Municipal Building, Suite 017
215 Martin Luther King, Jr. Blvd.
P.O. Box 2985
Madison, WI 53701-2985

Attention: Sydney Prusak

Re: Rezoning and Development Approval for 7043 Tree Lane, Capri Senior Communities

Dear Members of the Urban Design Commission, Plan Commission, and Common Council:

Please accept this Letter of Intent, Application and plans as our formal request for approval to rezone the above listed property from Suburban Employment (SE) to Commercial Corridor-Transitional (CC-T) and to develop a 272,075 square foot senior development which will include a mix of independent, assisted living units, and senior living amenity spaces. In addition to the rezoning, we are requesting approval of the following conditional uses for Dwelling Units in Mixed-Use Buildings:

1. Building including more than 24 units;
2. Building with a street-facing width of more than forty feet with less than 75% ground floor non-residential uses;
3. First floor with less than 75% ground floor uses.

Team

Developer: Capri Senior Communities
20875 Crossroads Cir., Suite 400
Waukesha, WI 53186
Amy Schoenemann
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Architect: AG Architects
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Wauwatosa, WI 53213
Eric Harrmann
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Civil Engineer: D'Onofrio Kottke and Associates, Inc.
7350 Westward Way
Madison, Wisconsin 53717
Bruce Hollar
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Landscape Architect: D'Onofrio Kottke and Associates, Inc.
7350 Westward Way
Madison, Wisconsin 53717
Matt Saltzberry
msaltzberry@donofrio.cc

Existing Conditions

The currently vacant site is located on Tree Lane directly north of the Livesey Company's Navitus Campus and abutting the Tamarack Trails Condominium development to the west. The Livesey Company owns the two adjacent commercial retail buildings to the east and south east that include Paul Mitchell School, KJ's Curry Bowl, Orthodontic Specialists, A Breed Apart Animal Hospital, Madison Metropolitan School District Offices, La Petite Academy, and Midwest Dental.

Staff and Neighborhood Input

The Development team first met formally with city staff on October 22, 2018 and has continued to consult with them regularly either at in-person meetings or via email or phone. The development team met directly with representatives of the Tamarack Trails Neighborhood Association on two occasions. Two neighborhood meetings were held, the first on December 13, 2018 and the second on March 18, 2019.

Project Overview

The five-story development will include 150 independent living units and 32 assisted living units, some of which will be located in a secure memory care unit. The development will include a restaurant, café, and wellness center to serve residents and their friends, family and guests from the neighborhood. Outdoor amenities include a landscaped terrace and greenspace located to the rear of the building as well as a rooftop terrace on the fifth floor with views to the north and east.

The development will face an internal street, half of which will be upgraded to city street standards as part of this development. The remaining half will be upgraded to city street standards when the property to the east is redeveloped.

Relevant City of Madison Planning Documents

The designated land use indicated in the comprehensive plan, Imagine Madison, is Community Mixed Use (CMU). The goal of CMU is to encourage a relatively high-intensity mix of residential, retail, office, institutional, and civic uses, generally located adjacent to a major transportation corridor. Buildings may be two to six stories and have a density of 130 units per acre.

Project Schedule

Construction will begin the fall of 2019 and end Spring of 2021 with an opening tentatively scheduled for April 2020.

Sustainability

Buildings will be built to high energy efficiency standards, including insulation, HVAC, and LED lighting. The development team will consult with Focus on Energy to ensure the project capitalizes on any other available technologies.

The storm water management requirements for this development are significant. An integrated approach utilizing a variety of best storm water management practices is necessary to meet the quantitative and qualitative requirements. These site and landscape features are both functional and aesthetic enhancements for the development. The plant palette will feature species native to Wisconsin.

Lot Coverage

- Total Lot Area = 128,640 square feet
- Impervious (Lot Coverage) = 77,500 square feet
- Pervious = 51,140 square feet

Operations

Management Plan

See attached

Transportation

The transportation needs and options for Capri's residents vary based on the distinct populations served within the building. A lower level parking structure is offered for independent living that choose to bring their own vehicle to the community. Traditionally, assisted living residents do not bring a vehicle from home but can be accommodated depending on resident capability. A 10-12 person, Capri branded, passenger van will provide transportation to residents for local activities, grocery shopping, appointments, and other events as requested by residents. Family members also provide an active role in transporting residents to local destinations, primarily medical appointments for assisted living and memory care residents. A visitor entrance with drop-off canopy is provided to accommodate the ease of this activity.

Fire Evacuation

See attached

Public Subsidy

None

We look forward to working with the city to develop a quality high-density, mixed-use senior development that will allow west side residents, including those living in the adjacent Tamarack Trails Condominiums, to age in place. We urge staff, Plan Commission, and Common Council to review this project with a broader perspective that takes into account the design, economic feasibility, and, most importantly, the overall benefit this project will bring to the West Side of Madison.

Regards,

Amy Schoenemann

Attachments

Management Plan

MANAGEMENT PLAN

About Capri Senior Communities

Based in Waukesha, Wisconsin, we at Capri pride ourselves on being able to offer hands-on management and care for every community that our seniors call "home".

Every community is designed to provide for the unique needs and desires of today's seniors so they can live as independently as possible. Our levels of care range from Independent Living (IL) to Assisted Living (AL) to Memory Care.

Because our priority is to help seniors experience life in a carefree, safe and comfortable way, we have developed several unique programs to support their needs. The Enhanced Services Program (ESP) provides supportive services to residents in Independent Living communities, enabling seniors to receive the care they need without having to move. Second, the Gain and Retain your Overall Wellness (GROW) program focuses on residents' quality of life including programs on social, intellectual, spiritual, emotional, and physical well-being.

Seven years ago, Capri had 50 employees and 13 communities. Today, we employ over 600 people and operate and manage 22 communities. We not only provide health care, we manage in-house dining programs and numerous other wellness related programs.

Madison Operations

The new Madison campus will incorporate all of these components into the campus plan. The on-site management of the new campus in Madison will consist of the following staffing plan:

- Executive Director, Assistant Executive Director
 - Responsible for the day-to-day management of the building
- Healthcare Staff
 - 24/7 health care staffing responsible for the direct care of the residents
- Dietary Manager, Line Cooks, Dietary Aides, and Wait Staff
 - Dining program feeds 3 meals / day to Assisted Living and Memory Care
 - Provides IL meals and catering for events and activities in the building
- Part-time Nurse Manager, LPN
 - Oversees care and care plan for Assisted Living and Memory Care programs
- Memory Care Activity Manager, IL Activities Coordinator
 - Memory Care specific activities that promote wellness
 - Responsible for activities to engage residents
- Marketing / Community Relations Manager (CRM)
 - Responsible for marketing and leasing
- Maintenance
- Housekeeping
- Receptionist

Overall the campus will employ 40-45 FTEs. The staff at this campus will also be fully supported by Capri regional and home office personnel. Due to the regulations associated with the CBRF license, the Assisted Living and Memory Care components are staffed 24/7 with 2-3 healthcare staff working 3rd shift.

Food and supply deliveries occur 5-7 times per week during business hours. Deliveries occur on box trucks; there are no semi-truck deliveries at our buildings.

Due to the use of the building, we do get ambulances that respond to our buildings to emergency and non-emergency calls. Generally, we receive 1-2 visits per week, the majority of which are non-emergency. We have EMT agreements that will be put in place to respond to calls without lights or sirens in non-emergency situations.