

March 19, 2018

Mr. Thomas Hovel  
City Planner/Zoning Administrator, City of Fitchburg  
5520 Lacy Road  
Fitchburg, WI 53711

Re: Oak Ridge Senior Housing  
2546-2556 South Fish Hatchery Road

Dear Mr. Hovel,

JT Klein Company, Inc. is proposing the rezoning of 2546-2556 South Fish Hatchery Rd to accommodate the development of mixed income independent senior apartment building as well as a private pay memory care community. A neighborhood meeting was held March 8, 2018 at the Fitchburg Public Library to discuss the proposal with local stakeholders. As the first step in the PDD process, this letter is intended to outline the development plan and initiate the rezoning of the properties known as 2556 and 2546 S Fish Hatchery Rd Fitchburg, WI, tax parcel IDs 225/0609-164-8020-3, 225/0609-164-8001-6, 225/0609-164-8470-9, and 225/0609-164-8460-1 from their current zoning of R-R Rural Residential and R-D Rural Development to PDD Planned Development District.

### **Development Overview**

Oak Ridge will offer Fitchburg seniors a range of rental housing options tailored to the needs of older adults. The campus will contain a total of 140 units on 4.73 acres, a density of 29.6 units per acre. These units will be divided between independent senior apartments and designated memory care units, with the separate uses occupying different buildings. A four story multifamily building will include the independent senior apartments and will be located on the north end of the site, with a one story building encompassing the memory care units further south on the property. A preliminary proposed site plan is included below:



The project will offer 100 units of independent senior housing in a four story building to be constructed on the northeast corner of the property. Of these 100 units, we anticipate approximately 85% of units will be affordable to individuals earning no more than 60% of the Dane County Area Median Income (AMI). These affordable units are designed to appeal to retired seniors living on fixed incomes, who rely on Social Security or fixed benefit pensions to support their cost of living. These seniors are particularly vulnerable to the rising cost of housing in Dane County, as their income is inflexible and cannot adjust for an increase in living expenses.

In addition to independent living apartments, the project will contain a single story, 40 unit memory care facility in the southwest portion of the site. These apartments cater to older adults with Alzheimer’s disease, dementia and other degenerative memory issues. The memory care units will offer 24-hour supervised care including medical assistance, full service housekeeping, and three prepared meals a day. Architecturally, the memory care building will be a single story structure with an internal courtyard to maximize wayfinding and safety while also allowing residents daily access to outdoor green space. The physical layout and security of the memory care building is designed so that wandering behavior is minimized and the environment is easy to navigate for Alzheimer’s and dementia patients.

Ample parking will be available onsite, totaling 144 underground and surface stalls. As memory care residents will not be drivers, the parking associated with this building will meet the needs of visitors and staff. The bulk of the parking will be associated with the independent senior building, which is anticipated to include 76 underground stalls and 41 surface stalls. The memory care building will offer 16 adjacent surface stalls to accommodate staff and visitors. We anticipate that 11 of the stalls immediately to the north of the memory care will be flex stalls that can be shared between memory care staff or visitors to the independent living as necessary.

We additionally propose constructing a series of walking trails and interconnecting green space throughout the property, particularly along the eastern edge of the site. It is expected that the south eastern corner of the site will be utilized for storm water management and will be retained as green space. The project will utilize this area as an attractive amenity for residents and constructing a small trail system to connect the apartments with this green space.

### **Rationale for Changing Zoning District to PDD**

The project is proposing a rezoning of the property from R-R Rural Residential and R-D Rural Development to PDD Planned Development District in order to accommodate the uses outlined above. Currently, no zoning designation exists in the city which would allow for the proposed mix of uses and density.

The Fitchburg zoning district that most closely fits the spirit of the project is R-H High Density Residential, and it is important to point out that the city Future Land Use Plan for this site is High Density Residential. However, the R-H High Density Residential District has several constraints that would preclude this proposed use, including a minimum requirement of two parking spaces per unit and a maximum height of 45 feet or three stories. Additionally, according to Section 22-146 of the zoning code R-H zoning is only applicable to properties 90,000 square feet or less if the zoning is designated after October 12, 2010. This property is 206,039 square feet, making the R-H zoning designation incompatible. For comparison, if this property were to be divided into three parcels we believe that the R-H zoning would allow for 125 units of apartments with a mix of 50-50 one and two bedrooms.

Rezoning the property to PDD Planned Development District will allow for the greatest flexibility to determine appropriate density and parking requirements for this multi-use senior residential project. The combination of an independent senior apartment building and memory care facility in one campus is a special case that would be difficult to anticipate through zoning code. Thus, it is reasonable to consider a tailor-made PDD zoning designation for this property in order to accommodate this unique development.

### **Economic, Social, and Environmental Impacts**

Developed as proposed, this property will generate significantly increased tax revenues for the City of Fitchburg. Currently, the site is assessed for taxes totaling \$12,634.76 for 2017. Currently, our proposed development is estimated to have total project costs of approximately \$24,000,000. In order for our project to be successful in obtaining tax credits from WHEDA and move forward City financial participation will be requested by JT Klein Company Inc. to make the project both feasible and competitive in the WHEDA process. We anticipate that this financial participation to include some combination of City TIF, waiver of park or impact fees and/or potentially the City creating an affordable housing development fund with the proceeds derived from one keeping one of its active TIF Districts open for another year.

The positive social impacts of this project include the addition of independent senior apartments affordable to residents with a wide range of incomes. This will occur in an area of Fitchburg most conducive to senior housing due to its access to downtown municipal facilities such as the senior center and library. By adding residential density to this service-rich area of Fitchburg, the project will help to increase the walkability of the downtown area by allowing more residents to walk to these municipal locations.

The March 20, 2018 Affordable Housing Summit Housing Needs Summary meeting notes outline Fitchburg's goal to increase access to affordable units as a tangible goal: "Build more rental units, at

various price points. A total need for 2,200 net additional units is projected over the next 12 years (redevelopment of existing units will result in more total units constructed). New construction should target the full spectrum of prices and incomes, from under 30% of median income to above 120% of median income.” We propose to add 100 rental units towards this goal of adding 2,200 units over the next 12 years, and 85% of the units will be designated as affordable to residents earning less than 60% AMI. Additionally, this project will add much needed memory care units to the Fitchburg area.

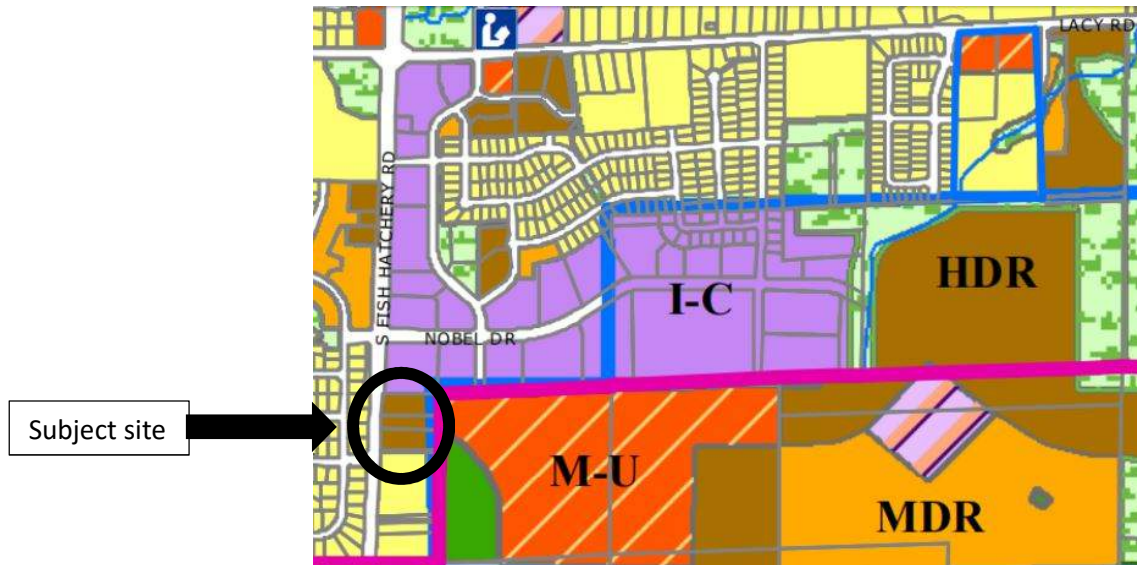
Environmentally, the project will maintain a significant amount of green space onsite for resident use and will mitigate all stormwater runoff. A series of walking trails leading to a park area and pond will be included in the site plan and are proposed to be available for public use.

### **Ingress and Egress**

We currently anticipate a single access point to the site along South Fish Hatchery Road that will serve the memory care and independent senior buildings. Feedback we received at the March 8<sup>th</sup> neighborhood meeting showed that neighborhood concerns exist about the impact of this project on South Fish Hatchery Road, and thus we intend to commission a professional traffic engineer to evaluate the suitability of our access point.

### **Consistency with Comprehensive Plan**

The August 2017 update of the Future Land Use map, included with the city Comprehensive Plan, indicates this site to be designated as High Density Residential. The multifamily density implied by the High Residential designation is consistent with this project proposal, which comprises a density of 29.6 units per acre.



### **Schedule for Completion**

We anticipate applying for Affordable Housing Tax Credits from Wisconsin Housing and Economic Development Authority (WHEDA) in December 2018, with the project closing and construction start occurring in Summer 2019. Construction of the independent senior building and memory care building

may occur simultaneously or in phases with the completion of the first phase, which is anticipated to be completed in Fall 2020.

### **Conclusion**

This letter serves as a pre-application application to rezone 2546-2556 South Fish Hatchery Rd to PDD Planned Development District in order to accommodate the development of 100 units of market rate and affordable independent senior housing and 40 units of memory care in a designated facility. The project will have significant economic, social, and environmental benefits to Fitchburg residents and will add much needed affordable senior housing to the city. The project's memory care units will fulfill an unmet need in the area, benefiting both the patients who will live in this building as well as their caretaker families.

We urge you to consider the benefits of this project when evaluating the potential rezoning of 2546-2556 South Fish Hatchery Rd. Please do not hesitate to contact me with any questions concerning this project proposal, and thank you very much for your time and consideration.

Sincerely,

Jacob T. Klein

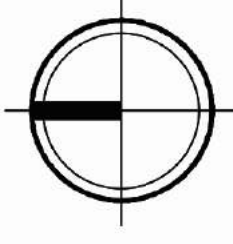
President



Aerial  
S. Fish Hatchery  
March 6, 2018





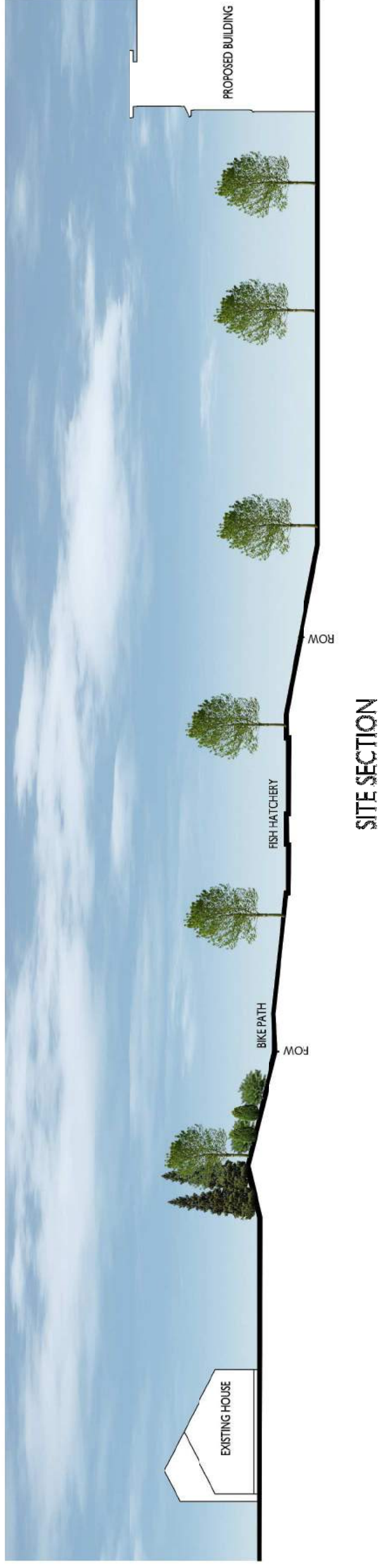


SOUTH FISH HATCHERY ROAD

BYRNELAND STREET



ELEVATION ALONG FISH HATCHERY ROAD

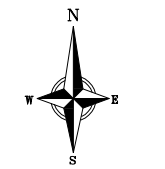


SITE SECTION

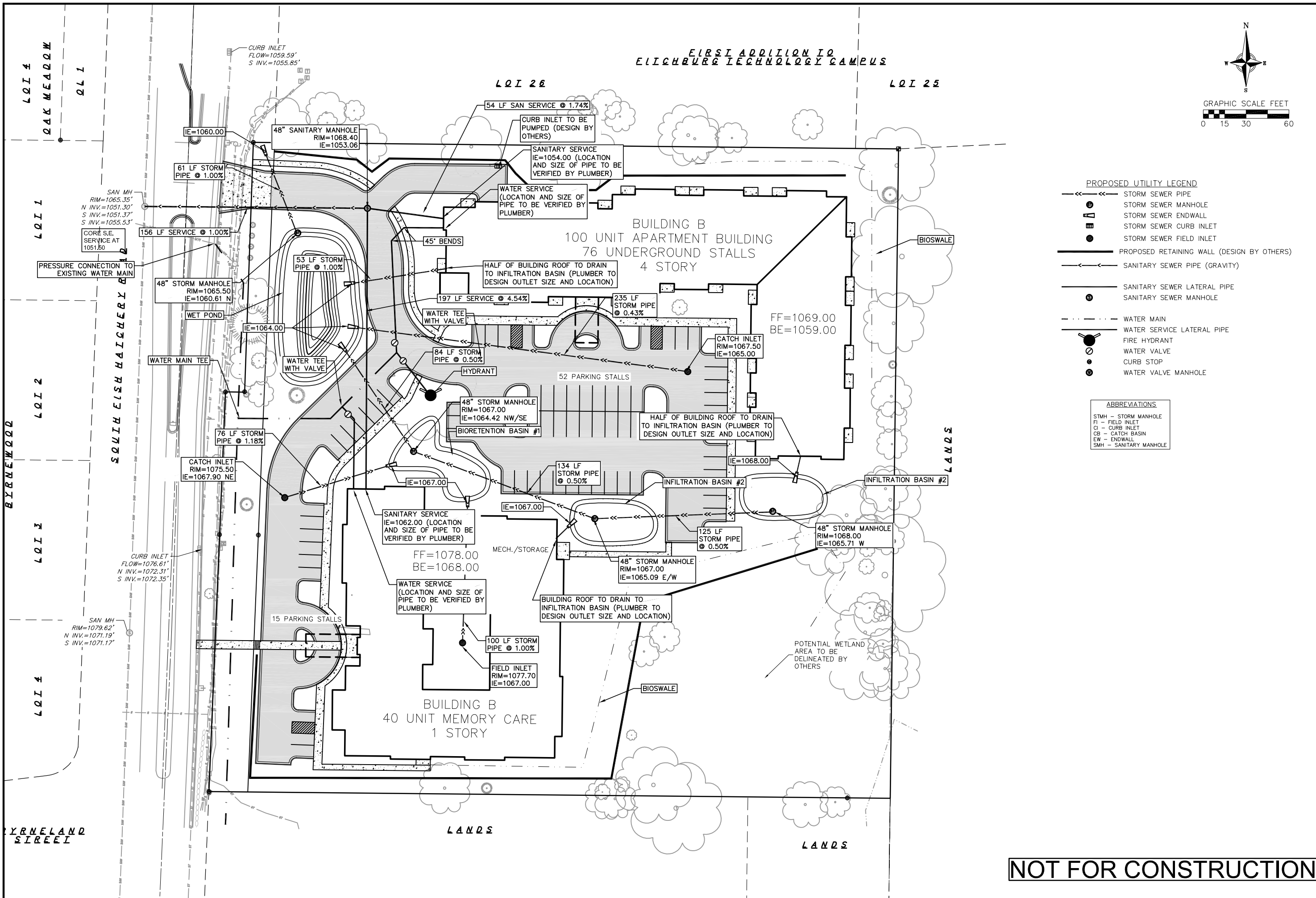




FIRST ADDITION TO  
FITCHBURG TECHNOLOGY CAMPUS



GRAPHIC SCALE FEET  
0 15 30 60



- PROPOSED UTILITY LEGEND**
- > STORM SEWER PIPE
  - ⊙ STORM SEWER MANHOLE
  - ⊞ STORM SEWER ENDWALL
  - ⊞ STORM SEWER CURB INLET
  - ⊙ STORM SEWER FIELD INLET
  - PROPOSED RETAINING WALL (DESIGN BY OTHERS)
  - > SANITARY SEWER PIPE (GRAVITY)
  - SANITARY SEWER LATERAL PIPE
  - ⊙ SANITARY SEWER MANHOLE
  - WATER MAIN
  - WATER SERVICE LATERAL PIPE
  - ⊙ FIRE HYDRANT
  - ⊙ WATER VALVE
  - ⊙ CURB STOP
  - ⊙ WATER VALVE MANHOLE

- ABBREVIATIONS**
- STMH - STORM MANHOLE
  - FI - FIELD INLET
  - CI - CURB INLET
  - CB - CATCH BASIN
  - EW - ENDWALL
  - SMH - SANITARY MANHOLE

REVISIONS	NO.	DATE	REMARKS

SCALE AS SHOWN  
DATE 03/20/2018  
DRAFTER JARC  
CHECKED JDOY  
PROJECT NO. 180065  
SHEET 3 OF 3  
DWG. NO. C-03

**NOT FOR CONSTRUCTION**

## DESCRIPTION

PARCEL A: All that part of the NE  $\frac{1}{4}$  of the SE  $\frac{1}{4}$  of Section 16, Township 06 North, Range 09 East, in the City of Fitchburg, Dane County, Wisconsin, described as follows: Beginning at the NE corner of the NE  $\frac{1}{4}$  of the SE  $\frac{1}{4}$  of said Section 16; thence West along the North line of the NE  $\frac{1}{4}$  of the SE  $\frac{1}{4}$ , 497.5 feet to the centerline of highway; thence Southerly along said centerline, 175.0 feet; thence East, 502.4 feet to a point on the East line of said Section 16, 175.0 feet South of the point of beginning; thence North along the East line of said Section 16, 175.0 feet to the point of beginning.

TOGETHER WITH

PARCEL B: All that part of the NE  $\frac{1}{4}$  of the SE  $\frac{1}{4}$  of Section 16, Township 06 North, Range 09 East, in the City of Fitchburg, Dane County, Wisconsin, described as follows: Commencing at the NE corner of said NE  $\frac{1}{4}$  of the SE  $\frac{1}{4}$ ; thence South along the East line of said NE  $\frac{1}{4}$  of the SE  $\frac{1}{4}$ , a distance of 175.00 feet to the point of beginning of this description; thence West 502.4 feet to the centerline of the highway and a point 175 feet South of the North line of said SE  $\frac{1}{4}$ ; thence South along said centerline 100 feet; thence East 505.0 feet more or less to a point on the East line of said Section, 100 feet South of the point of beginning; thence North along said line 100 feet to the point of beginning.

TOGETHER WITH

PARCEL C: Part of the NE  $\frac{1}{4}$  of the SE  $\frac{1}{4}$  of Section 16, Township 06 North, Range 09 East, in the City of Fitchburg, Dane County, Wisconsin, more fully described as follows: Beginning at a point on the East line of said Section 16, distance thereon 275 feet South of the East  $\frac{1}{4}$  corner of said Section; thence West 505 feet more or less to a point on centerline of County Trunk Highway "D"; thence South along said centerline 160 feet; thence East to a point on the East line of said SE  $\frac{1}{4}$ , 160 feet South of the point of beginning; thence North along said East line 160 feet to the point of beginning.

TOGETHER WITH

PARCEL D: Part of the NE  $\frac{1}{4}$  of the SE  $\frac{1}{4}$  of Section 16, Township 06 North, Range 09 East, in the City of Fitchburg, Dane County, Wisconsin, more fully described as follows: Commencing at the East  $\frac{1}{4}$  corner of said Section 16; thence South along the East line of said Section, 455 feet to the point of beginning of this description; thence North along said East line 20 feet to the Southeast corner of lands described in Volume 712 of Deeds, Page 581, as Document No. 1007319; thence West along the South line of lands described in said Volume and Page, to the centerline of Fish Hatchery Road, also known as County Trunk Highway "D"; thence South along said centerline 20 feet; thence East to the point of beginning.

ALL DESCRIPTIONS SUBJECT TO Transportation Project Plat 06-SR-101-0-C402 recorded in Volume 59-065B of Transportation Project Plats, Page 303, as Document Number 4487411, recorded in Dane County, Wisconsin.