Baron's South: Opportunity for a Senior Living Community

November 12, 2012

How Did We Get To This Point?

1998 Purchase of Baron's South

First Selectwoman Diane Farrell Establishes Committee to Look at Municipal Uses

2004

Center for Senior Activities Opens

2007

- Town Plan of Conservation and Development Finalized
- Weston and Sampson Report

2008

Blended Development of Senior Housing and Workforce Housing Presented

2009

Meetings and Research Continue:

Defining the Concept of a Senior Living Community on Baron's South

Experts We Consulted With (before 8-24):

Timothy Bannon	CHFA (CT Housing Finance Authority)
Paul Bailey	Paul Bailey Architects
Andrew Banoff	Jewish Home for the Elderly
Ross Burkhardt	New Neighborhoods, Inc.
William Cohen	Retired Marketing Professional
David Fink	Partnership for Strong Communities
Leslie Higgins-Biddle	LISC (Local Initiatives Support Corporation)
Ted Johnson	Marathon Development
Larry Kleutsch	Mutual Housing Association of S/W
Carol Martin	Westport Housing Authority
Joan McDonald	DECD (Dept. of Economic Community Development)
David Newberg	Westport Housing Authority Board Chairman
Ken Olson	POKO Partners
Rick Redniss	Redniss & Mead
Richard Rosen	Perkins Eastman
Larry Wagner	Wagner and Associates

November 2010

8-24 Request for Conceptual Use of Town-Owned Property Known as

Barons South: Positive Report

November 2010

- Affirms Community Need for Affordable Senior Housing
- Finds Town-Owned Land Should be Used to Meet Town Needs and a Balance Should be Sought Between Competing Town Needs
- Recommends that Future Development of the Land Should Allow Preservation and Enhancement of as Much Open Space as Possible.

March 2011

Baron’s South Committee Formed

Mission Statement:

The Baron's South Committee mission is to assist the First Selectman in accomplishing the vision of a Senior Living Community on Baron’s South.

Baron's South Committee Members

Steve Daniels, *Co-Chair*

- Partner, CSD Select Homes LLC, Westport real estate brokerage
- Immediate Past President A Better Chance of Westport
- Former Member Westport Human Services Commission
- Past President United Way of Westport/Weston

Marty Hauhuth, *Co-Chair*

- Former Westport First Selectman
- 12 year Member Board of Selectmen
- Executive Director Positive Directions - Westport nonprofit
- Deacon and former Moderator Saugatuck Congregational Church

G. Kenneth Bernhard Esq.

- Partner, Law Firm of Cohen and Wolf, P.C.
- Town Attorney, Town of Wilton
- Former Town Attorney Westport and Weston
- Four term Republican State Representative

Baron's South Committee Members

Rev. Edward Horne

- Pastor, Westport-Weston United Methodist Church
- Member, Westport Human Services Commission
- Co-chair, Interfaith Council of Westport and Weston
- Duke University (B.A); Yale Divinity School (M.Div)

Jo Fuchs- Luscombe

- Five term member CT State House of Representatives
- Assistant Minority Leader and Republican Whip
- Chair, Westport School Building Committee
- Former Chair Westport Zoning Board of Appeals

Sharon Rosen Esq.

- MA and PhD Health Psychology with research in Gerontology
- JD Cardozo Law School
- Practices Elder Law in Stamford and Westport
- Member, Westport Commission for Senior Services

Baron's South Committee Members

Yvonne Senturia MD

- Fellow, American Academy of Pediatrics
- MSc Epidemiology and Statistics University of London
- Retired Academic Pediatrician and Epidemiologist
- Immediate Past President, Westport League of Women Voters

John Thompson

- NY Certified Public Accountant; Member NY Bar
- Ret. Chairman-KMG Main Hurdman and KMG International
- Led negotiating team for merger with Peat Marwick Mitchell
- Trustee Clarkson University

Paul W. Van Orden

- Ret. Executive Vice President General Electric
- Dartmouth College AB; Northwestern University MBA
- Executive in Residence, Adjunct Professor Columbia Business Sch
- Board of Directors Federated Department Stores

May 2011

Text Amendment #625 Passed by Planning and Zoning Commission

- Density
- Subdivision

May 2011

- A zoning permit for assisted living facilities and full-care living facilities cannot be issued until 35% of the independent living facility units are built and zoning certificates of compliance are issued.

- No less than 60% of any independent living facility units with zoning certificates of compliance issued shall be affordable units pursuant to 32-15A.6.

June 2011

Appeal to RTM to Overturn Text Amendment #625

Does Not Succeed :25/4

Request for Proposal (RFP)

Researched Best Practices, Trends and Benefits

- Toured Senior Living Facilities
- Consulted with State Officials and Healthcare Experts
- Held Community Meetings 7/11 and 9/27

Visited 17 Senior Health Facilities in CT, MA, & PA

AFFORDABLE INDEPENDENT HOUSING PLUS SERVICES:

- **Carroll Village, Dillsburg PA - MAY 20, 2011**
  - **Schartner House**
  - **Westminster Place**
  - **Moyer House**
- **Simon Fireman Community - Randolph, MA - JUNE 20, 2011**
- **Peter Sanborn Place and Home Care - Reading, MA – June & August 2011**

AFFORDABLE ASSISTED LIVING AS A SERVICES PROGRAM:

- **Kingsway, Norwalk, CT**

CAMPUS NETWORK STRATEGY:

- **Wesley Village, Shelton, CT - JUNE 16, 2011**
- **Waveney Care Network, New Canaan, CT - JULY 8, 2011**

ASSISTED LIVING:

- **The Mews, Greenwich, CT - JUNE 1, 2011**
- **The Greens at Cannondale, Wilton, CT - APRIL 15, 2011**
- **Middlebrook Farms at Trumbull, CT**

TRADITIONAL SKILLED NURSING:

- **The Jewish Home for the Elderly, Fairfield, CT - June 30, 2011**

SMALL HOUSE MODEL:

- **Leonard Florence Center for Living, Chelsea, MA - JUNE 21, 2011**
- **Hebrew Rehabilitation Center, Dedham, MA - JUNE 20, 2011**
- **Mary's Meadow at Providence Place, Holyoke MA - AUGUST 8, 2011**
- **Sawtelle Family Hospice House, Reading, MA - June 21, 2011**

Incorporate the Guidelines from 8-24 & Text Amendment

- Develop the RFP Assisted by the Town Attorney, BOF, ARB, and the RTM
  (LRP and P&Z Committees)
- RFP Released by Purchasing Dept. on December 8th 2011
- Submission Deadline March 30, 2012

Essential Elements of the RFP

- 100 Rental Units
- Must Confirm to the Text Amendment
- Unbundled Services with Coordinator
- Financial Return to the Town
- Long Term Lease
- Universal Design
- Informal Gathering Spaces
- Community Room with Kitchen Facility

Request for Proposal

- January 11, 2012 held Informational Sessions for Potential Bidders
- January/February 2012 Conducted Tours of the Barons South Grounds and Buildings as well as the WCSA for the Potential Bidders

Evaluate the Proposals

March 30, 2012

Three Proposals Received:

- Becker & Becker
- Jonathan Rose Companies
- Westport Capital Partners

Summary of Developer's Teams

Developer	Jonathan Rose	Becker & Becker	Affirmative Hillspoint
Construction	Malkin	Suffolk Construction	Suffolk Construction
Property Management	Winn Residential	Winn Residential	Continuing Care Mgmt.
Architect	Perkins Eastman	Bruce Becker	Perkins Eastman
Service Coordinator	Jewish Home for the Elderly	Winn Residential	Continuing Care Mgmt.

Evaluate the Proposals

April 2012

- First Qualifier was an Adherence of Each Submission to the Guidelines of the RFP
- Two Submissions Basically Adhered; One had Significant Deviations

Evaluate the Proposals Process

May 4, 11 & 18th 2012

- Bidder Presentations Followed by Q & A
- Post Sessions, Each Bidder Left With a Number of Issues to be Clarified

Evaluate the Proposals Process

June 2012

- Committee Reviewed All Responses to Questions Raised at the Presentations
- Scheduled Site Visits with Becker and Becker and Jonathan Rose

Affirmative Hillspoint Evaluation:

- 220 Units, 48 Skilled Nursing Beds
- High Buy-In ($400,493- $873,018)
- Monthly Fees Average $6,000+ Per Unit
- 14 Percent Affordable (30 units)
- Bundled Services
- Limited Experience as a CCRC Operator
- Uses Entire Campus
- Entrance Fee Refund Policy?

Evaluate the Proposals Process

July 2012

- Reviews of the Financing of Project, Timetable for Completion and ROI with the Principals of Becker & Becker and Jonathan Rose

Becker & Becker Evaluation:

- Lowest ROI
- Limited Experience in Building Affordable Housing
- Significant Dependence on Grants

Recommendation to First Selectman

Jonathan Rose Companies Evaluation:

- Greater ROI, $500,000 Up Front and $250,000 Annually with Escalations
- Largest Personal Investment in Construction
- Proven Record of State Financing
- Most Experience in Developing Affordable Housing

Recommendation to First Selectman

Jonathan Rose Companies Proposal:

Met all Requirements of RFP

- 99 Rental Units, 59 Affordable
- Unbundled Services
- Full Time Wellness Coordinator
- Part-time Activities Coordinator
- Does Not Use the Entire Campus

Jonathan Rose Companies Recommendation

- 59 1 BDRM Affordable Unit for $1,084
- 24 1 BDRM Market Rate for $2,200
- 16 2 BDRM Market Rate for $2,800

Jonathan Rose Companies Recommendation

Full Time Wellness Coordinator

- Healthcare Planning
- Home Care
- Partners with DHS to Offer Services to Westport Sr. Residents
- Transportation Services

Part Time Activities Coordinator

- Responsible for Developing and Coordinating All Social Activities
- Interfacing with the WCSA on any programs applicable for residents
- Manage any Activities Involving the Community Room and Kitchen

Jonathan Rose Companies: A Great Partner for Westport

- Experience
- Depth of Management Team
- Demonstrated Success Funding
- Expert in Affordable Housing Law
- Creating a Community

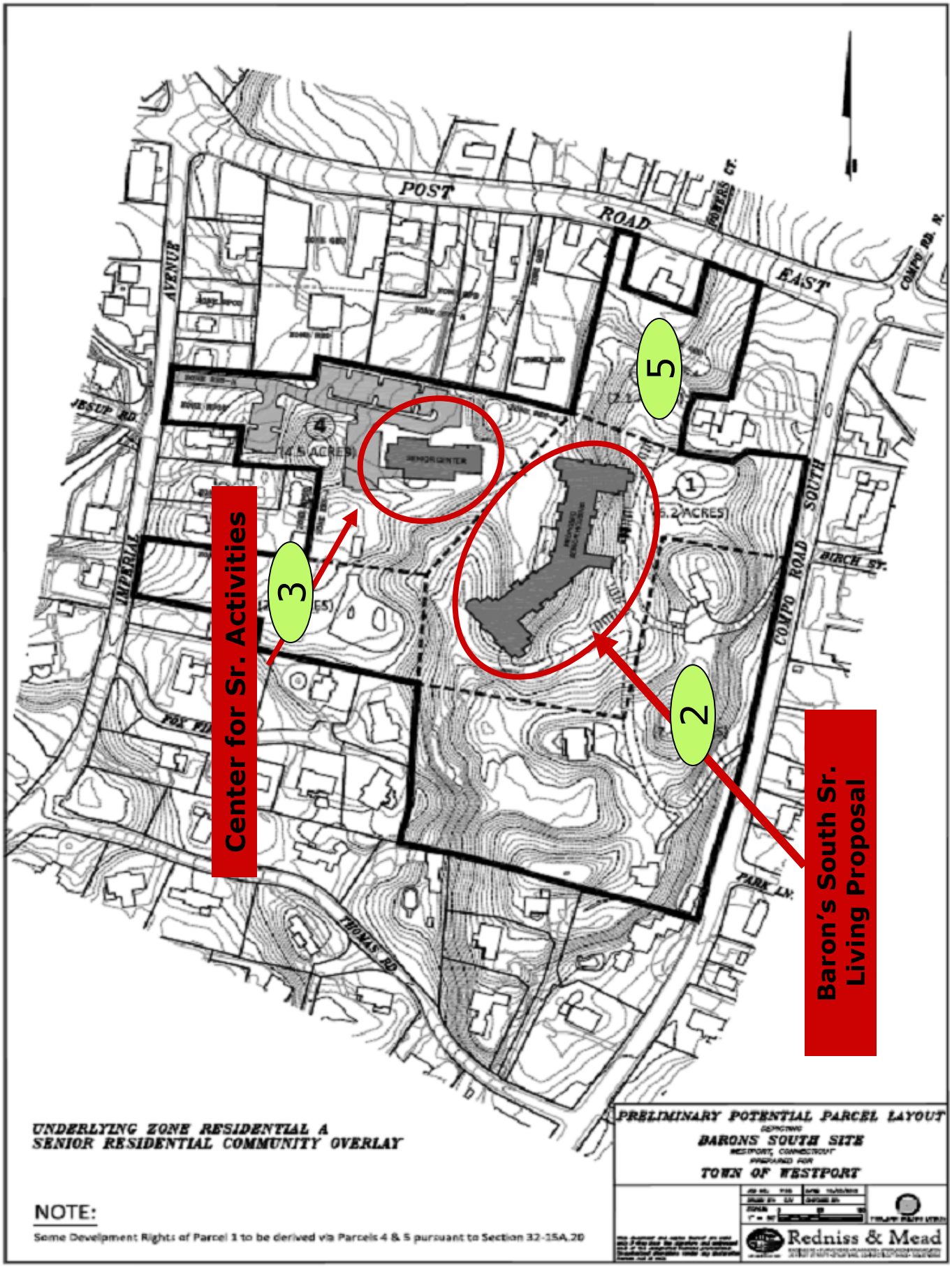
Critical Need for Mixed Income Housing Designed to Allow Seniors to Age in Place With Unbundled Services

Downtown Location
Residents Can Walk to Stores

- Town Plan – Encourages People to Live Downtown
- Vitalizes Community
- Vitalizes Seniors

Location Leverages
The Center for Senior Activities

- Return on Investment
- Seniors Can Access more Easily and More Often


POST ROAD EAST
AVENUE
JESUP RD
IMPERIAL
FOX HILL
THOMAS RD
COMPO ROAD SOUTH
BIRCH ST.
PARK LN.
COMPO RD. N.
(4.5 ACRES)
(5.2 ACRES)
SENIOR CENTER
1
2
3
4
5
Center for Sr. Activities
Baron's South Sr. Living Proposal
UNDERLYING ZONE RESIDENTIAL A
SENIOR RESIDENTIAL COMMUNITY OVERLAY
NOTE:
Some Development Rights of Parcel 1 to be derived via Parcels 4 & 5 pursuant to Section 32-15A.20
PRELIMINARY POTENTIAL PARCEL LAYOUT
DEPICTING
BARONS SOUTH SITE
WESTPORT, CONNECTICUT
PREPARED FOR
TOWN OF WESTPORT
Redniss & Mead

Proposal Doesn't Use Entire Property Leaves Acres Available for Other Uses

- Decisions for the Future
- Open Space
- Additional Housing
- Skilled Nursing
- Sale

Efficiencies in Care of Seniors

- Residents Compare Experience
- Transportation Services
- Service Coordinator Works with Town Departments
- Experience with Natural Disasters

Jonathan Rose Will Repair and Maintain Roads & Walking Trails

- Passive Open Space
- Does Not Preclude Future Uses

Result:

- No Cost to the Town
- No Increased Taxes
- No Town Subsidies

Our Goal:

Meet A Critical Community Need

And

Provide A Fair Financial

Return to the Town

What is the Need for Mixed Income Rental Housing that Supports Seniors Aging in Place?

• Municipal Agent Report for 2011-12	83
• Westport Center for Senior Activities	142
• 211 Infoline	22
• WHA/Canal Park waitlist	15
• WHA/Hidden Brook waitlist	11
• WHA/moderate income waitlist	25
Total Senior Requests	298

What is the Need? – More Statistics

- Human Services currently serves 670 senior households age 60+
- Approximately 250 of these would meet 8-30-g affordability income guidelines
- 300+ middle income seniors would be served by mixed income rental choices
- Claritas data (856 senior households incomes less than $50 K)

Need For Housing Choices

- Overall shortage of rental housing in Westport regardless of age or income

- Rental housing affordable for low and moderate income residents:

  Westport Housing Authority's stock with waitlists of 282 households, 51 of whom are seniors

  The Saugatuck on Bridge Street, a 36 unit cooperative for moderate income seniors

- Currently no housing at any price designed for aging in place, i.e. housing using universal design.

- Many more community resources now offering services to help seniors remain in their homes but the homes are not easily adaptable to accommodate changing needs.

Those are the Statistics –

Who Are the People Behind the Numbers?

- Long Time Westport Residents, Usually in Their Mid to Late 70's or 80's
- Retirees Living on Social Security and Modest Pensions, Usually Having Been One Income Households
- Artists, Teachers, Writers, Therapists, Advertising Copywriters and Account Execs, Business People, College Professors

Why Do They Want and Need This Housing?

- Their houses have become a burden.
  - The cost of repairs and routine maintenance is more than their incomes can support and they are often borrowing against the house for things like a new roof or furnace.
- There is a serious medical need that is draining resources to pay for care and the house can't accommodate the sick spouse's mobility needs.
- A spouse has died and now there is only one Social Security check, not enough to cover expenses.
- They raised their families here, have friends here, and want to grow old near these people they love.

Demographic Imperative

- State and Nation Growing Older at Unprecedented Rate
- In CT approx. 1 Million Baby Boomers, 1/3 CT Population
- CT 65+ Population Expected to Increase 64% from 2006 to 2030
- Choosing Overwhelmingly to Stay in Homes and Communities as they Age
- Demographic Change will Affect Housing, Economic Development, Healthcare, Transportation, Community Support Systems and Civic Engagement

What Kind Of Community Are We?

- Intrinsic value of keeping our older residents here where they continue to contribute as well as enjoy the community they helped build
- Respect for the Common Good – a community supports the well-being of all its citizens regardless of age
- Lessons from Storm Sandy