

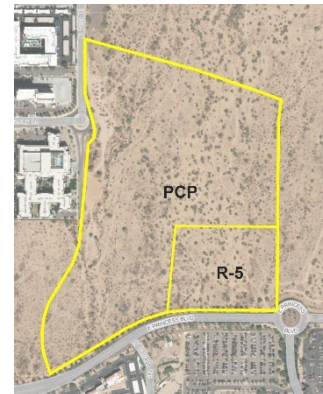
Erickson Senior Living

City of Scottsdale – Development Plan Review Project Narrative

On behalf of Erickson Senior Living (“Erickson”), we are pleased to submit this Development Plan application to implement the zoning approved in the Crossroads East Planned Community District (“Crossroads PCD”) (an approximately 1,000 acre area illustrated in blue below) by requesting that the City Council approve the proposed Development Plans for a new Continuing Care Retirement Community (“CCRC”) for the 55-acre site located approximately 900 feet east of Scottsdale Road on the north side of Princess Drive and the west side of the Miller Road Alignment, with the northern boundary 300 feet south of the Mayo Boulevard alignment (the “Property”), shown bounded in yellow.



Erickson is requesting City Council review and approval of the Development Plans proposed for the Project, which, per Zoning Ordinance Section 7.810 et al, are required to be processed and approved as part of the use of the Planned Airpark Core Development (“PCP”) Zoning District (Zoning Ordinance Sections 7.820.A & E and Table 7.820.A), the zoning district which will be utilized on most of the Property (with exception for the “Princess Transition Zone” required by the Crossroads PCD which, as the location of the Residential Health Care Facility portion of the CCRC, will be developed under the Multiple-Family Residential [“R-5”] Zoning District for this memory care portion of the overall Project).



The Development Plans provided meet the requirements of the standards of the Crossroads PCD and the Zoning Ordinance as well as illustrate the proposed development of a community of approximately 975 senior focused residential units (all within the PCP Zoning District) (at a density of approximately 21 du/ac) and up to 175 assisted living/skilled nursing/memory care beds (the Residential Health Care Facility to be located in the R-5 Zoning District). Erickson provides modern “age in place” facilities and services, which includes a number of restaurants, fitness

facilities, professional medical services, personal services (such as hair salons and light convenience retail) and continuing education (the “Project”).

Under a separate application, Erickson has applied for a Conditional Use Permit (“CUP”) for development of a Residential Health Care Facility within the R-5 Zoning District.

It is important to note that the Property is currently owned by the Arizona State Land Department (“ASLD”) and is subject to the public auction process and that Erickson may or may not be the successful bidder. While the zoning of the Property is already in place (last approval via Case 19-ZN-2002#7, Ordinance No. 4379) and the applicable zoning district are ready to be allocated by ASLD as part of the auction process from the Crossroads PCD Land Use Budget, prior to bidding Erickson (or any other potential applicant) needs assurances that their Development Plans are approved and that they are ready to move into the permitting review process, hence this “pre-auction” application.

Please note that this application does not seek to amend or otherwise modify the approved Crossroads PCD nor any of its standards and that any such approval shall not be binding on the final purchaser unless they seek to develop the Property consistent with this approval, if granted. For all other development proposals not consistent with this request, new Development Plans will need to be processed as required by the City.

The purpose of this narrative is to illustrate how the proposed Development Plans implement the policies of the General Plan, the Crossroads PCD and how the design/layout of the Project meets the requirements of the City of Scottsdale as expressed in the various plans, policies and guidelines applicable to new development as described in more detail herein.

A. Background on the Relationship between the City and the Arizona State Land Department, Owner of the Property.

To provide a summary of the unique nature of the Property, as more detailed in the Crossroads PCD, which states that the intent of the zoning approvals there are to improve value of the lands within the PCD to the benefit of the beneficiaries, which are public schools and other entities responsible for providing education and other public benefits to the citizens of Arizona. More specifically, the Crossroads PCD states that:

“Arizona State Land Department (“ASLD”) owns a significant amount of land in all four quadrants of the interchange of the Loop 101 and Hayden Road. ASLD is the Trustee of the Arizona State Land Trust (the ‘Trust’) and as such, is the fiduciary for beneficiaries of the Trust, which includes public institutions (primarily for education) in Arizona. ASLD administers the Trust land under the direction of the State Land Commissioner.

State Trust land is often misunderstood in terms of both its character and management. Trust land is not public land. Trust land is different from public land such as parks or National Forests, in that Trust lands are managed by the Arizona State Land Department to generate revenue for K-

12 schools and 13 additional institutional beneficiaries. The Trust accomplishes its mission through its sale and lease of Trust lands for grazing, agriculture, municipal, residential, commercial, mining, and open space purposes.

Crossroads East may be the most visible and important undeveloped Trust property in the Phoenix metropolitan area. Not only is Crossroads East conveniently located in proximity to key transportation routes, it is also located in an area that has, and is continuing to develop with high quality and high end residential, commercial, office, light industrial and tourism uses. The Trust land is critical in terms of its potential for economic development and job creation for the region.

ASLD, serving as the fiduciary for the Trust is required by the Arizona Constitution to receive maximum value for the sale or lease of Trust lands for the benefit of the Trust. Given this Constitutional mandate, it is incumbent upon ASLD to carefully plan these properties to maximize their ultimate value. Accordingly, the ASLD is in the process of re-evaluating the existing development plans for the Trust lands in this area to determine if such plans are appropriate to current market needs.”

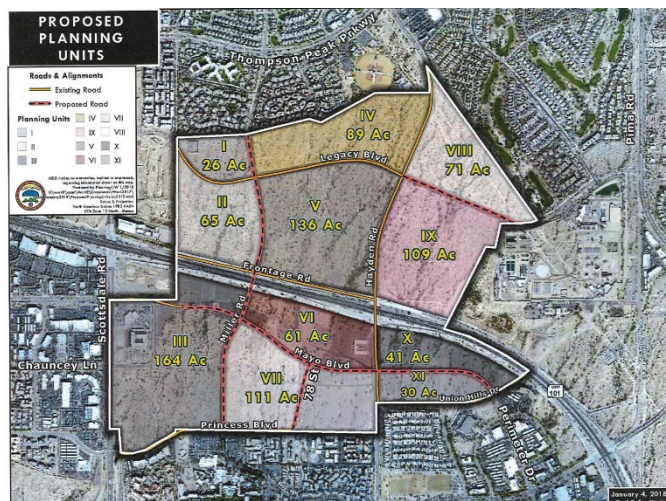
The most important function of ASLD is to ensure maximum value for its beneficiaries. Prior entitlement efforts and associated development agreement approvals between the City of Scottsdale and ASLD provide a framework to accomplish maximum value within a regulatory framework that incorporates the City’s General Plan and other planning expectations so that the resulting development is both of high value and of overall community benefits and “fit” to provide a sustainable built environment in addition to funding critical public entities.

B. Site Location and Entitlement Background.

As noted above, the Property is located a bit east of Scottsdale Road, north of Princess Drive, west of the Miller Road Alignment, and south of the Mayo Boulevard alignment. The Crossroads PCD establishes “Planning Units” that divide the larger master planned area into sub-areas with differing land use regulations.

The Property is located within Planning Area III, which allows the zoning and the development of land uses under the R-5, C-2/C-3, C-O, I-1, or PRC/PCP zoning districts, allowing a wide range of land uses from residential to office, retail as well as manufacturing/employment focuses land uses.

The Property is set back from major arterial road frontages (such as Scottsdale Road and Mayo Boulevard), which limits



the appropriate land uses to those that do not need a high visibility transportation corridor or a “landmark” location to be successful.

For example, a corporate headquarters or any sort of retail would not be an appropriate use for the Property due to limited visibility from passing traffic that would be typical with a Loop 101 or Scottsdale Road location. As such, the Property is ideally the location of a land use that will not require such visibility while providing for a transition from the commercial/retail uses along Scottsdale Road towards existing residential to the east while buffering the Scottsdale Princess Resort, an important tourist supporting use. Given these constraints, land uses that make business sense at this location are those that do not need significant visibility, such as residential, back office (i.e. call center) or distribution/industrial users. Many of those users are high traffic generators or otherwise are less than compatible with the context. Because of this, the Project, which is a unique mix of senior adult oriented residential and supportive services, is the ideal land use for the Property as it is an employment generator while being a less intensive traffic generator compared to other “off the main road” uses (such as a call centers), all of which are otherwise allowed by the Crossroads PCD.

In order to facilitate development of the Project, Erickson is requesting that, if they are the successful bidder at auction and are to acquire the Property, that (i) the R-5 Multiple-Family Residential District be applied to the location of the assisted living/memory care/skilled nursing facilities (the “Residential Health Care Facility”) in the “Princess Transition” area (note that a Conditional Use Permit is being processed for the Residential Health Care Facility in the R-5 zone as required by the Zoning Ordinance) and (ii) the Planned Airport Core Development District be applied to the remainder of the Project site.

In review of the zoning entitlements for the Property, the Crossroads East Planned Community District was originally prepared by the Arizona State Land Department and approved by the City of Scottsdale in 2002 (Case 19-ZN-2002). As a “Planned Community District” (Zoning Ordinance Section 5.2100 et al), the Crossroads East PCD contains unique development standards and guidelines that act as a master plan for future development within its boundaries.

Over the last 24 years, this PCD has been modified/amended as follows:

Crossroads East PCD Case History				
Crossroads East PCD	2002	19-ZN-2002	1,000 acres	Amended MDP and development standards
Crossroads East PCD Amendment 1	2011	19-ZN-2002-2	1,000 acres	Amend MDP & PC Zoning District
Crossroads East PCD Amendment 2	2013	19-ZN-2002-3	12 acres	Amend MDP and PC Zoning District
Crossroads East PCD Amendment 3	2015	19-ZN-2002-4	12.26 acres	Amend PRC development standards

Crossroads East PCD Amendment 4	2016	19-ZN-2002-5	10 acres	Amend PRC to add PSD
Crossroads East PCD Amendment 5	2018	19-ZN-2002-6 Ord. No 4246 Resolution No. 11145	1,000 acres	Revise PCD to reflect market needs
Crossroads East PCD Amendment 6	2018	19-ZN-2002-7 Ord. No 4379 Resolution No. 11330	10 acres	Amend Land Use Budget to transfer C-O to R-5

As noted prior, this application does not propose any amendments to the approved Crossroads PCD, rather this is a request is for approval for Development Plans that are typically reviewed when the PCD zoning district is approved (as required by Zoning Ordinance Section 5.2103 and Article VII). In short, this is a request to “implement” the already approved zoning allotments as per the Land Use Budget, utilizing approximately 47 acres of PCP zoning and 10 acres of R-5 zoning and a total of 975 dwelling units from the allotment of 4,163 (leaving 3,188 dwelling units for use elsewhere within the overall Crossroads PCD under the PRC and PCP Zones).

C. About the Applicant, Erickson Senior Living, the Project and Resident Safety.

Erickson is the 6th largest senior living and continuing care retirement community provider in the United States, currently serving over 28,000 residents on 23 campuses, nationwide. Erickson is a national leader in senior housing and related services offering a full continuum of care to residents ranging from Independent Living to Assisted Living, Memory Care, and Skilled Nursing. Erickson communities provide a maintenance-free, amenity-rich and vibrant lifestyle for seniors 62 years and older. The goal of their communities is to provide an environment where seniors can “age in place” and enjoy their retirement years in an amenity rich community.

As to their business model, Erickson residents pay a refundable one-time entrance fee for the right to occupy a unit and then pay a monthly fee for services maintenance, utilities, meals, activities which can scale according to need at various life stages. Erickson residents live in the community under a Life Care Contract with the retirement community. CCRC’s in Arizona are regulated by the Department of Insurance and Financial Institutions. Living in an Erickson retirement community provides housing, services, and healthcare, backed by the entrance fee, for the resident(s) for a lifetime free from the prospect of ever being required to leave. As residents of the Erickson community, they have the option to progress through the continuum to higher levels of care, as needed, allowing residents to remain in the community over a long period.

The proposed Erickson community will consist of approximately 975 apartment-like independent living units, within loosely arranged neighborhoods (each building grouping and its specific amenities), each of which will include resident activity hubs. These independent living units will range in size from one-bedroom to two-bedroom, two and a half bath apartments with an open floor plan design. These living units contain all the facilities necessary for a resident to

maintain their independence for as long as possible. The amenity hubs are the main activity areas for residents daily needs and socializing, strategically located throughout the communities to promote Erickson's mission of providing a vibrant lifestyle to residents. To embrace its Sonoran Desert setting and the vistas beyond, building heights have been limited to be lower than the allowed 84 feet (at a max of 74 feet), which when incorporated with thoughtful placement and focus on viewsheds to/from buildings, results in a campus that is designed to establish views corridors and minimize visual impacts to the surrounding neighborhood fabric.

Project-wide shared resident amenities will include a fitness/well-being center, pool, medical center, pharmacy, and life enrichment center. Multiple themed restaurants and cafes with shared kitchens will be in each of the neighborhoods, these restaurants serve as social gathering places and promote interaction between neighborhoods. Finally, a movie theatre, classrooms, games room, media centers, creative arts, hobby shops and satellite fitness centers will be located throughout the community. The primary design objective of the resident amenities and services is to promote activity and socialization for residents throughout the entire community.

Outdoor living is extremely important to Erickson as it enriches residents' health and overall wellbeing. Outdoor dining, fitness, walking, relaxation and games areas are provided throughout the campus. Programming includes resident gardens, pickleball, dog parks, bocce courts, putting greens, fire pits, and amphitheaters.

In addition to the independent living residences, the Project will include assisted living, skilled nursing, and memory care suites, housed together in a separate neighborhood known as Continuing Care. All suites will have private bedrooms and baths, in a single or shared setting, with a variety of indoor and outdoor amenity spaces. As is typical with memory care uses, this area is designed to provide more access control to ensure resident safety.

The Project will be built in phases with subsequent buildings and amenities added as the community grows. All the independent living buildings are connected by conditioned links or bridges. The campus architectural style will keep with the character of the local area including building aesthetics, materials, and systems. One parking space is provided for each independent living residence with additional parking provided for staff and visitors, totaling roughly 1.5 parking spaces per independent living residence, provided through structured and surface parking options. In addition, Erickson offers residents shuttle services to local and regional offsite destinations, further reducing automotive trips to/from the Project.

Erickson communities are generally a low-impact user of infrastructure, including roadways and schools. A CCRC Use, as defined by the Institute of Transportation Engineers (ITE), is a low generator of traffic compared to other potential uses. This significant reduction in traffic generation is the direct result of the CRCC land use, as well as the amenities provided within the community, alternate (shuttlebus) transportation programs and staggered shifts throughout the Erickson workforce. This unique trip pattern is ideal for this location, which is near a very busy transportation corridor and will benefit from a development that will reduce traffic impacts for its neighbors.

As to health care services (including emergency services such as Fire Department

utilization), a key component of Erickson communities is their integrated health care system which is intended to minimize the need for hospital emergency room visits. Each community provides an on-site physician practice, Erickson Health Medical Group (EHMG), with experienced geriatric care providers. In the event that an emergency response is required or requested, each Erickson community has a Security and Emergency Service department staffed with Emergency Medical Responders (EMR) responsible for responding and providing aid to anyone within the community. This team is always available, so unlike smaller providers of this housing type, Erickson staff are able to manage most resident needs without relying upon emergency services (for example, if a resident needs assistance with a minor fall or other situation that requires staff to assist, but not necessarily raising to the level of a true emergency requiring transportation).

Once a resident emergency call is received and then dispatched, site security will deploy resources based on established protocols to respond and/or investigate the situation, report their findings and either address minor or noncritical issues on-site with the assistance of medical staff on-site or escalate to requesting 911 assistance for emergency transportation/lifesaving care needs. Erickson's typical response time is less than four (4) minutes in an emergency. Residents may be taken directly to the on-site medical center for further evaluation and/or treatment. If further action or evaluation is deemed necessary by Erickson staff, a resident may be directly admitted to the on-site skilled nursing care unit for further evaluation.

Approximately 87% of all calls for service that occur on a typical campus are resolved through Erickson's own emergency response protocols and staffing levels, which significantly reduces the impact on local emergency services. In practice, this equates less than 2 calls per day, on average, per campus to local emergency responders. Recent internal data shows that in 2023, 13% of calls for assistance resulted in a 911 call for an emergency medical response while the remainder were able to be handled on-site by trained Erickson professionals.

Another benefit of the Project is workforce development. A number of Erickson's communities nationwide have workforce development partnerships with local vocational, technical, and community college programs to host clinical rotations. These programs train Registered Nurse (RN), Certified Nursing Assistant (CNA) and Licensed Practical Nursing (LPN) students. These efforts help to build a local workforce that benefits not only the Project, but the larger community by helping to fill much needed medical positions.

D. Economic Impact.

As detailed in the July 2024 Economic & Fiscal Impact Report ([Exhibit A](#)), the Elliot D. Pollack & Company concluded that the Erickson Project is projected to employ up to 731 full- and part-time positions at buildout. These jobs will range from front office, security wait staff and maintenance to higher-paid professional services. In addition, new residents in the independent living units will spend part of their disposable income in the local community. At buildout and stabilization, the operations of the senior living community will generate 1,400 total jobs, \$89.7 million in direct, indirect and induced wages, and \$194.2 million in total annual economic activity.

The construction of the proposed community would generate \$52.2 million in revenues for the State of Arizona, \$11.0 million for Maricopa County and \$13.6 million for the City of

Scottsdale. These revenues include primary impacts (construction sales tax, permit and impact fees), and the secondary impacts generated by spending of onsite construction workers.

After the project is completed, primary operations of the development (property taxes), impacts from residents living in the community (sales tax on resident spending, income taxes, utility taxes and increased state shared revenue) and the secondary impacts from employee spending would create an estimated \$2.1 million each year for the State of Arizona, \$1.5 million for Maricopa County and \$1.5 million for the City of Scottsdale. Additional property taxes would be collected by school and special districts, estimated to be \$2.7 million per year.

E. Project Sustainability

Sustainability is an important component for every Erickson community. The proposed development will help advance the goals of reducing water usage, reducing energy consumption, and waste diversion by building energy efficient buildings, incorporating low impact site design features and implementing recycling programs. Sustainable elements of an Erickson community include LED lighting, utility management systems, energy efficient appliances, energy saving mechanical systems, accommodations for recycling and composting of waste, electric vehicle charging stations, electric and energy efficient fleets, low-use irrigation systems and native plantings. A copy of Erickson's 2023 sustainability report is attached for reference (Exhibit B).

As a sustainability focused development, the Project site will align with the objectives outlined in the 2035 General Plan, for example by addressing a key goal of the conservation of overall water use. The Project will provide essential senior care and living spaces while minimizing water consumption as validated by data collected from numerous Erickson senior campuses across the country. Two primary factors contribute to the reduced water impact of our facilities:

- 1) Erickson facilities have a significantly lower average occupancy rate (approximately 1.3 persons per unit) compared to typical multi-family or single-family residential units (approximately 2.2 persons per unit for multi-family and 2.7 persons per unit for single-family), where a lower occupancy correlates to a lower water usage per unit; and
- 2) water resource efficiency is a fundamental strategy implemented in all Erickson communities, leading to reduced long-term operating costs for the buildings and lower utility expenses for the residents. As water scarcity is a common challenge in Arizona, Erickson is committed to implementing various conservation measures, including high-efficiency appliances, low-flow fixtures, and water-wise landscaping.

These efforts underscore our dedication to being responsible stewards of the City's water resources. For a specific example, the newly constructed Erickson Wind Crest campus in Douglas County, Colorado provides a recent example of how significant water savings were achieved by utilizing water-wise landscaping that cut water usage by over 15 million gallons.

Erickson is committed to providing a water efficiency program for this Project's water usage, encompassing annual consumption and peak demands resulting from their efficiency programs.

F. City Adopted Policy Plans and Project Conformance

The City of Scottsdale has expressed community desires and objectives in its various adopted plans and policies. The following is a summary of some key elements that this Project will help to support/implement. While the Project is constant with the Crossroads PCD, and not a rezoning application, it is important to discuss how the Project can forward the community goals as expressed by the General Plan.

The Scottsdale General Plan 2035 Land Use Map, designates the Property as a place for “Mixed-Use Neighborhoods”. Per the General Plan:

“Mixed-Use Neighborhoods focus on human-scale development and are located in areas with strong access to multiple modes of transportation and major regional services. These areas accommodate higher-density housing combined with complementary office or retail uses. Mixed-Use Neighborhoods are most suitable near and within Growth and Activity Areas. Mixed-Use Neighborhoods may be non-residential in the Greater Airport Character Area.”

By adding senior focused dwellings to the area, the Project will contribute to the existing mix of uses developed in the larger Crossroads PCD area (which include typical residential rentals, retail, commercial, resort and other uses). In addition, the Project will provide residents and their visitors both on-site services (such as restaurants, fitness, healthcare and banking) as well as the opportunity to patronize the surrounding commercial businesses, which contributes to the horizontal mixed-use environment of the Crossroads area, which each part of the larger plan providing supporting parts to the overall mixed-use community resulting from various housing, retail and commercial opportunities on sites throughout and around the area.

The project will provide internal mixed-use with resident facilities for medical, restaurant, personal services, and recreation. True commercial uses are not viable due to the project location not being on an arterial street with high visibility. The project will allow for those commercial uses desiring the visibility to be located along the major arterials and not interior to the overall PCD, thus keeping high trip generation uses along the arterials and away from the local street network and the Princess Resort.

The Project is in compliance with several of the goals as outlined in the Scottsdale General Plan 2035 (the “General Plan”). As part of your assessment of this Development Plan request, we offer the following assessment of the Project and its expected long-term and short-term community benefits which help the City achieve several objectives of the General Plan, most notably Land Use Goals 1, 2, 3, 5, 6, and 7.

F.1 Land Use Element

Goal LU 1: Enhance Scottsdale’s economic viability by encouraging land uses that reinforce the city’s reputation as the premier international tourist destination in the Southwest and sustain the city’s role as a regional cultural center and economic hub. Land uses should be compatible with Scottsdale’s character and physical appearance.

LU 1.1 Encourage land uses that preserve a high quality of life and further define Scottsdale's sense of place within the region.

LU 1.2 Celebrate Scottsdale's desert city image by preserving natural open space and natural ecosystems.

LU 1.3 Promote development patterns that integrate with and reinforce the character of an area. The city will continually review development patterns to ensure consistency of development in areas with fragmented or evolving patterns.

LU 1.4 Collaborate with adjacent jurisdictions to understand the dynamics of, and coordinate on, emerging and redeveloping areas adjacent to the city boundary.

The proposed Project will significantly contribute to Scottsdale's economic viability. The community will allow the senior population of the City to continue to live in Scottsdale (which is important to retaining employees and their employees in the City as their parents/relatives age by providing housing choice in the area) as well as attracting their families for visits (benefiting the tourist industry and supporting services). Particularly for family members that may travel from other regions to visit, resident guests are expected to be spending money at the local hotels, restaurants/retailers, recreational activities, and much more as part of a trip to Scottsdale to spend time with their family member residing at the Project. In addition to funds injected into the local economy, the careful design of the Project will maintain the area character by preserving views within the Property as well as from adjacent properties resulting from the Project limiting its building height to 5-stories and not utilizing the 84 feet allowed by-right under the entitlements of the Crossroads PCD and its "towers in the garden" design style allowing for generous open spaces and an open setting.

Goal LU 2: Sensitively transition and integrate land uses with the surrounding natural and built environments.

LU 2.1 Ensure neighborhood "edges" transition to one another through compatible land uses and development patterns.

LU 2.2 Sensitively integrate low-density development patterns and land uses bordering the Scottsdale McDowell Sonoran Preserve and other sensitive natural features.

LU 2.3 Locate employment and major non-residential uses along major transportation networks to limit impacts on residential areas and provide citywide and regional access.

The proposed building setbacks and landscaped buffers will help transition the Project from the adjacent commercial uses. The Project itself is not anticipated to have a negative impact on the surrounding community that would justify additional buffers beyond those driven by site design and the need to provide significant drainage solutions that are located along the Miller and Princess Boulevard corridors. The design of the Project takes into consideration the natural desert landscape, preservation of internal mountain views, and includes high quality design. Furthermore, the proximity to the Princess Resort has been factored into the site design, with lower building mass and significant landscape/open areas along the Princess Boulevard frontage to support a resort environment and a quality arrival experience for the resort and residents in the neighborhoods beyond.

Goal LU 3: Maintain a balance of land uses to support a high quality of life.

LU 3.1 Allow for the diversity and innovative development patterns of residential uses and supporting services to provide for the needs of the community.

LU 3.2 Integrate housing, employment, and supporting infrastructure, primarily in mixed-use neighborhoods and Growth and Activity Areas, to support a jobs/ housing balance.

LU 3.3 ‡ Maintain a citywide balance of land uses, and consider modifications to the land use mix to accommodate changes in community vision, demographic needs, and economic sustainability.

LU 3.4 Provide an interconnected, accessible open space system, which includes pedestrian and equestrian links, recreation areas, canals, and drainage ways.

LU 3.5 Engage the community in all land use discussions.

The Project proposes unique residential living experience for seniors that isn't a typical care home/nursing home from the past. Erickson's developments are unique mixed-use communities that give their residents the independence they desire at the same time the level of care that they may want/need. The community will include interconnected trails/open space as well. The CCRC proposed will allow seniors to stay and continue to be a part of the Scottsdale community. By adding a missing land use (senior living) to the area, this growing demographic can remain in the City and continue to enjoy the quality of life in Scottsdale.

Goal LU 5: Promote land use patterns that conserve resources, including land, clean air, water, and energy.

LU 5.1 Encourage a variety of compatible mixed-use land uses within or next to Growth and Activity Areas, along major streets, and within particular Character Areas to reduce automobile use and improve air quality.

LU 5.2 Concentrate greater development intensities in Growth and Activity Areas, thereby reducing development pressures in low-density areas and conserving energy.

LU 5.3 Minimize environmental hazards and protect the natural character of the desert through sensitive development on Environmentally Sensitive Lands.

The proposed Project is in close proximity to Desert Ridge and Kierland. This close proximity to the commercial destinations noted above, as well as the resident's "retried" status (therefore not commuters) will help limit automobile use and, by extensions, would improve air quality (and reduce demand on local roads while allowing for significant residential density). Future, the Projects design takes into consideration the existing desert landscaping compliments the existing natural desert character.

Goal LU 6 :Attract and retain diverse employment, business, and retail land uses to improve the economic well-being of Scottsdale's residents.

LU 6.1 Promote opportunities for the expansion and revitalization of employment and commercial uses within the city.

LU 6.2 Support well-planned, clustered employment centers of related or similar uses such as Healthcare and Research and Development land uses.

LU 6.3 Encourage commercial land uses of similar scale and character in proximity to or within medium- to high-density residential areas to promote walkable connections.

Per the Economic & Fiscal Impact Study prepared by Elliot D. Pollack & Company, it is estimated that the Project will provide 731 (direct) jobs. While the Project itself will not be an employment center (vs a large office building), in addition to the quality jobs created, the Project will also be an amenity for other businesses who are located or are looking to locate to Scottsdale by providing a housing option for the parents/family members of their employees who would want to live near their family members (especially those of an ageing population). The Project allows for another type of housing type for seniors that may be beneficial in attracting employers to the area by providing a much needed opportunity to have a safe, quality place for mom/dad.

Goal LU 7: Protect the viability of the Scottsdale Airport by encouraging compatible land uses and development types in the surrounding area.

LU 7.1 Maintain and follow the Airport Part 150 Noise Compatibility Program. Noise contours and other related information must be disclosed to all potential residents and businesses according to the Airport Influence Area and Noise Contour Maps.

LU 7.2 Maintain Runway Protection Zones next to the Scottsdale Airport.

LU 7.3 Support aviation-related economic development opportunities and land uses near the Scottsdale Airport.

It is not anticipated that this Project will have a negative effect on the airport. The Project will comply with all regulations set forth by the City of Scottsdale, the FAA, and the Scottsdale Airport.

F.2 The Healthy Community Element

Goal HC 5 : Accommodate the physical, social, and economic needs of Scottsdale's senior citizen population in community decisions.

HC 5.1 Address the increasing needs of Scottsdale's senior citizen population by:

Providing opportunities for older citizens to interact with the community; Promoting a variety of choices in residential living options; Supporting and promoting the provision of elder care services from public and private providers, including employers; Meeting their changing mobility needs; and Promoting aging-in-place initiatives.

HC 5.2 Work collaboratively with public and private partners to plan for the needs of Scottsdale's aging population.

The proposed Project, a Continuing Care Retirement Community, will provide additional housing for the City's increasing senior population. As discussed prior, Erickson is one of the largest CCRC operators in the country. The Project will provide seniors the ability to live in Scottsdale in a location that still allows them access to the various amenities that the City has to

offer (recreation, retail, restaurants, etc.). Allowing aging in place is important to meeting the goal of the City to accommodate the needs of an ageing population and to retain older residents as part of the community.

F.3 The Greater Airpark Character Area Plan

GOAL LU 1: Maintain and expand the Greater Airpark's role as a national and international economic destination through appropriate land uses, development, and revitalization.

- *Policy LU 1.1: Maintain and expand the diversity of land uses in the Greater Airpark.*
- *Policy LU 1.2: Support a mix of uses within the Greater Airpark that promote a sense of community and economic efficiency, such as clustering similar/supportive uses and incorporating residential intended for the area's workforce, where appropriate.*
- *Policy LU 1.3: Promote development intensities supportive of existing and future market needs.*
- *Policy LU 1.4: Encourage the redevelopment of underutilized land to more productive uses.*
- *Policy LU 1.5: Maintain and continue to foster dialogue between the City of Scottsdale and Arizona State Land Department to facilitate innovative use and development of State-owned land.*
- *Policy LU 1.6: Encourage the assemblage of small, inefficient parcels and the replacement of obsolete structures in the Greater Airpark utilizing strategies including, but not limited to, development flexibility and expedited processing of proposals.*
- *Policy LU 1.7: Encourage adaptive reuse of buildings.*
- *Policy LU 1.8: Prevent erosion of Greater Airpark Employment land uses through land use regulations, such as limiting retail and restaurants in areas designated for employment.*

The proposed use of the Property as a CCRC will contribute to the diversity of land uses within the Greater Airpark area. The land use proposed will provide a housing option for an aging population who want to continue to live in the Scottsdale area and take advantage of the existing and future destinations within the area.

GOAL LU 2: Promote the Greater Airpark as a national and international tourism destination through tourism-related land uses.

- *Policy LU 2.1: Encourage the integration of a broad range of cultural and recreational experiences in the Greater Airpark.*
- *Policy LU 2.2: Provide flexibility in land use regulations and other incentives to attract cultural institutions and local, national, and international events to locate in the Greater Airpark.*
- *Policy LU 2.3: Maintain and enhance the Regional Tourism and Open Space Land Use Areas as major event hubs in the Metropolitan Area.*
- *Policy LU 2.4: Encourage public, as well as privately owned and operated, recreation, tourism, and entertainment land uses to enhance the local, regional, and international*

attraction of the Greater Airpark.

- *Policy LU 2.5: Maintain, enhance, and expand City-operated event facilities in the Greater Airpark, such as WestWorld and the Scottsdale Sports Complex.*

While the Project itself will not be an international tourism destination, it will service as a destination for family members and friends that come to visit the future residents of the community. It would be anticipated that said guest would stay in one of the nearby hotels and spend their money at the numerous shopping centers and restaurants in the area, thus creating the same tax benefits as more typical tourism.

GOAL LU 3: Sensitively transition land use, scale, and intensity at the Greater Airpark boundary in areas adjacent to lower-scale residential neighborhoods.

- *Policy LU 3.1: The scale of existing residential development should be acknowledged and respected through a sensitive edge buffer, which may include transitional development standards, landscape buffers, and sensitive architectural design solutions.*

While not directly adjacent to lower-scale residential neighborhood, the Project provides substantial building setbacks with carefully designed landscaping to buffer the Project from the surrounding uses as some are “future” (i.e. vacant land to north and east) that will allow for maximum options for future land uses on other ASLD holdings. Furthermore, the Project building height is sensitive to the area and is not proposing to be developed at the maximum height of the PCD district of eight-four (84) feet. The Project will provide a transition from the more intense commercial uses along Scottsdale Road and the Loop 101 to the residential areas further east of the Property and to the Scottsdale Fairmont Princess Resort south of the Property.

GOAL LU 4: Utilize development types to guide the physical and built form of the Greater Airpark.

- *Policy LU 4.1: Encourage medium-scale Type A development in areas appropriate for transitions from Types B and C development to lower-scale areas in and adjacent to the Greater Airpark Character Area.*
- *Policy LU 4.2: Promote larger-mass Type B development in and around the Aviation Land Use Area and at WestWorld.*
- *Policy LU 4.3: Encourage higher-scale Type C development in areas with access to major transportation corridors and where lower-scale residential areas will be buffered from higher-scale development.*
- *Policy LU 4.4: Support transitions in scale between development types.*
- *Policy LU 4.5: Greater visual variety and architectural interest should be considered in the design of the Greater Airpark's tallest buildings (Regional Core), particularly at the pedestrian level.*
- *Policy LU 4.6: Transitions between development types should incorporate a blending in context of each development type, and integrate the characteristics between them through appropriate site and building design.*
- *Policy LU 4.7: Encourage greater visual variety between employment/commercial land uses and residential neighborhoods, and avoid continuous building shapes and mass*

adjacent to residential neighborhoods.

The Greater Airpark Character Area Plan indicates the conceptual development types as mainly Type C -Higher Scale and Regional Core. The proposed building height is 5-stories which is appropriate based on the existing development in the area and transition the building height and massing. Situated approximately 1,000 feet from Scottsdale Road, the Property does not have frontage on an arterial roadway. The location of the Property will continue the transition from the more intense development types into the interior medium scale development types anticipated by the Character Area Plan.

GOAL LU 6: Promote the Greater Airpark as a mixed-use economic and aviation-based employment center that is complementary to Downtown Scottsdale, the city's premier cultural, civic, and residential mixed-use core.

- *Policy LU 6.1: Prioritize employment uses over residential uses in the Greater Airpark.*
- *Policy LU 6.2: Complement the Greater Airpark business environment with institutions of higher learning, such as university campuses, vocational/trade schools, and business schools.*
- *Policy LU 6.3: Retail and service uses in Airpark Mixed Use and Regional Tourism Land Use Areas should serve local, as well as regional, markets.*
- *Policy LU 6.4: Enforce and modify development standards and building codes to enhance compatibility of residential uses with aviation and employment, and buffer existing industrial and aviation uses from new and existing residential development.*
- *Policy LU 6.5: In accordance with the Airport's Part 150 Noise Compatibility Study, require aviation easements and fair disclosure statements for all new and redevelopment projects in the Greater Airpark.*

It is not anticipated that this Project will have a negative effect on the airport. The Project will comply with all regulations set forth by the City of Scottsdale, the FAA, and the Scottsdale Airport.

GOAL LU 7: Develop an interconnected network of Signature Corridors to support the Greater Airpark as a place for meeting, creating, shopping, learning, as well as working.

- *Policy LU 7.1: Encourage growth along corridors with the greatest potential for activity, new development, revitalization, tourist attractions, and enhanced multi-modal connections.*
- *Policy LU 7.2: Promote a greater mix of uses along identified Signature Corridors, which complement and are compatible with each respective land use designation.*
- *Policy LU 7.3: Encourage and incentivize revitalization along Signature Corridors, particularly south of the Central Arizona Project Aqueduct.*
- *Policy LU 7.4: Integrate entertainment, education uses, cultural uses, and tourist attractions along Signature Corridors.*

The Property is located adjacent to a signature corridor. As noted in this narrative, aside from public sidewalk adjacent to the street frontages, and east/west pedestrian trail will be provided on the north side of the Property to allow for pedestrian connectivity around the Property. These pathways will contribute to the goal of an interconnected network in the Greater Airpark.

GOAL LU 8: Create an interconnected network of meaningful open spaces within the Greater Airpark.

- *Policy LU 8.1: Recognize and promote the value of usable open space as part of the community's quality of life.*
- *Policy LU 8.2: Sustain and enhance meaningful open space corridors within the Greater Airpark.*
- *Policy LU 8.3: Promote public/private partnerships in the design of development plans that provide functional urban open spaces, such as plazas and pocket parks, within and between projects.*
- *Policy LU 8.4: Provide parks and open spaces that provide functional relief to workers, residents, and visitors that are easily accessible, and serve as focal points in the Greater Airpark community.*
- *Policy LU 8.5: Link the Greater Airpark to existing and planned citywide and regional open spaces, trails, and path systems.*
- *Policy LU 8.6: Collaborate with other governmental agencies to preserve and protect regional open space and to acquire, develop, fully maintain, and operate regional facilities.*

While the Project itself will provide an abundance of private open space, a portion of the Property in the southwest corner of the Property will be utilized for publicly accessible open space. While this area is not fully programmed at this time, it may include amenities such as benches, seating areas, walking trails, and a public art component. Aside from public sidewalk adjacent to the street frontages, and east/west pedestrian trail will be provided on the north side of the Property to allow for pedestrian connectivity around the Property.

G. Planned Community District (“PCD”) Findings

Per Section 5.2104 of the Zoning Ordinance, before approval or modified approval of an application for a proposed P-C District, the Planning Commission and City Council is required to make a number of findings. While these findings have already been made with the approval of the Crossroads PCD, we have addressed them again with this Development Plan application to illustrate the conformance of the Project to the existing approvals and to the Zoning Ordinance.

A. That the development proposed is in substantial harmony with the General Plan, and can be coordinated with existing and planned development of surrounding areas.

Per the Scottsdale General Plan 2035 Land Use Map, the site is designated as “Mixed-Use Neighborhoods”. Per the General Plan, “*Mixed-Use Neighborhoods focus on human-scale development and are located in areas with strong access to multiple modes of transportation and major regional services. These areas accommodate higher-density housing combined with complementary office or retail uses. Mixed-Use Neighborhoods are most suitable near and within Growth and Activity Areas. Mixed-Use Neighborhoods may be non-residential in the Greater Airpark Character Area.*”

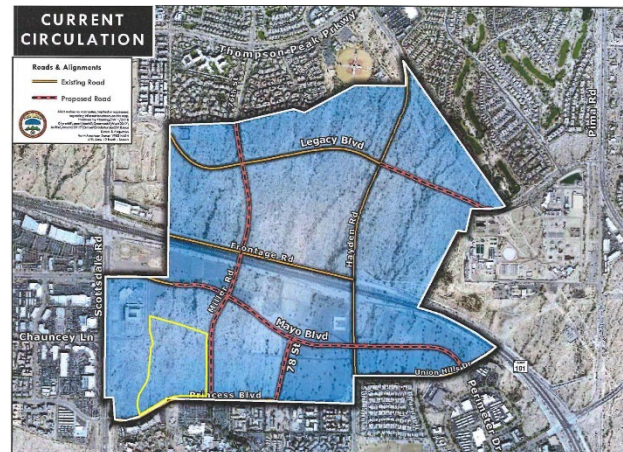
The Project will contribute to the existing mix of uses developed in the area (residential, commercial, resort). In addition, the Project will provide residents and their visitors the opportunity

to patronize the surrounding commercial businesses contributing to a true horizontal mixed-use environment, with residents, employees and visitors utilizing surrounding land uses/businesses.

The project will provide internal mixed-use with resident facilities for medical, restaurant, personal services, and recreation. True commercial uses are not viable due to the project location not being on an arterial street with high visibility. The project will allow for those commercial uses desiring the visibility to be located along the major arterials and not interior to the overall PCD, thus keeping high trip generation uses along the arterials and away from the local street network and the Princess Resort.

B. That the streets and thoroughfares proposed are suitable and adequate to serve the proposed uses and the anticipated traffic which will be generated thereby.

The Project will construct the required half street improvements associated with development of the Property. As shown on the “Roads and Alignment” Map , the project will be adjacent to the Miller Road alignment. As noted prior, Erickson communities are generally a low-impact user of infrastructure, including roadways and schools. A CCRC Use, as defined by the Institute of Transportation Engineers (ITE), is a low generator of traffic compared to other potential uses, such as single family homes or other employment uses. This significant reduction in traffic generation is the direct result of the CRCC land use, as well as the amenities provided within the community, alternate (shuttlebus) transportation programs and staggered shifts throughout the Erickson workforce.



C. The Planning Commission and City Council shall further find that the facts submitted with the application and presented at the hearing establish beyond reasonable doubt that:

- 1. In the case of proposed residential development, that such development will constitute a residential environment of sustained desirability and stability; that it will be in harmony with the character of the surrounding area; and that the sites proposed for public facilities, such as schools, playgrounds and parks, are adequate to serve the anticipated population. The Planning Commission and City Council shall be presented written acknowledgment of this from the appropriate school district, the Scottsdale Parks and Recreation Commission and any other responsible agency.*

The Project is not a standard residential development, the above section is not applicable. The Project will not impact schools, playgrounds nor parks due to the age and family make-up of the residents. The Project will benefit schools by adding significant property taxes to their benefit without the necessity of providing student facilities for 975 families.

2. *In the case of proposed industrial or research uses, that such development will be appropriate in area, location and overall planning to the purpose intended; and that the design and development standards are such as to create an industrial environment of sustained desirability and stability.*

The Crossroads PCD already permits industrial, or research uses within certain Planning Unit areas, no industrial or research uses are proposed with this request for master plan approval.

3. *In the case of proposed commercial, educational, cultural, recreational and other nonresidential uses, that such development will be appropriate in area, location and overall planning to the purpose intended; and that such development will be in harmony with the character of the surrounding areas.*

The Crossroads PCD already permits commercial, educational, cultural, recreational, and other nonresidential uses within certain Planning Unit areas. This application does not propose any new uses not already contemplated by the Crossroads East PCD.

H. Design Guidelines.

The following section address how the Project will comply with applicable development items as set forth in the City of Scottsdale Commercial Design Guidelines.

1. Site Design

In determining finish floor elevations and layout of each building, the design team took into consideration the natural topography of site and took advantage of the grades to set building entrances. Additionally, the site blends the constructed environment at the perimeter of the community integrating natural ground plane forms and low water use landscape materials in a desert transitional palette.

Natural features of the site influenced site design and overall design theme/direction of the community. An arroyo feature is planned to bisect the western portion of the community adding character and aesthetic value to the community while integrating functional drainage value. Whenever grading allows, parking garages are nestled into the slope to minimize building height.

The Property will include a perimeter loop road to provide vehicular circulation throughout the site, including to the standalone assisted living/memory care/skilled nursing facility. There will be sidewalk connections between interior pedestrian circulation and adjacent city sidewalks. The interior sidewalks will connect to new public sidewalks along 73rd Place, Princess Boulevard, and Miller Road. Further, open spaces and courtyards are linked together by sidewalks internally.

A landscape buffer is proposed on the perimeter of the Project and is designed to transition from the surrounding street network with a transitional low water use Sonoran Desert palette into

various landscape zones internally which will showcase the breadth of plant materials within the local climate.

Trash, loading and services are located away from public street views, in a screened/enclosed area attached to the building(s).

Drainage and retention facilities will be designed and constructed within the first phase of development to convey flows and provide for required retention volumes. The project will include regional storm water channels to provide drainage solutions for the surrounding area.

2. Development Patterns and Relationship to the Public Realm

The Project will include construction of the adjacent portions of 73rd Place and Miller Road. Both streets will be developed to match the corresponding roadway sections in the area. The streetscape will include native trees and accents, which is consistent with other developments in the area.

Residents' entrance to the community from public street will be clearly identified with a Gatehouse that provides resort-style entrance. Adjacent to the Gatehouse is a Marketing Center that will serve as a public gateway to the project. Beyond the Gatehouse, a motorcourt leading to a porte-cochere will serve as main entrance to the community buildings, followed by a series of residential entries into each building.

The building's pedestrian relationship to the street will need to be balanced with the need of residents' safety. Visual relationship is achieved by placement of fenestrations, openings and entrances. A comprehensive internal pedestrian network connects the community and provides for specific access locations external to the community. Where public transit is available, the sidewalks within the public rights-of-way will provide connectivity. As noted prior, the Project will provide a pedestrian east/west trail along the north Property line and public open space in the southwest corner to engage the public realm.

3. Parking

The parking requirement will be met without substantially overparking the Project. Traffic is historically low with the demographics, especially with the availability of amenities on site. The proposed use (retirement/senior living community) will provide on-site amenities as well as a shuttle service that will encourage less use of personal vehicles. EV charging stations will be provided throughout the parking areas on site.

Surface parking areas are distributed throughout the community and deemphasized with landscape areas. Rigid geometry of parking areas will be mitigated by careful placements of landscape islands and where appropriate, curvatures following parallel drives or natural features. Parking layouts and internal drives are laid out to avoid redundancy where possible.

Parking structures will be screened with architectural elements and landscaping. Exposed garages are activated with pedestrian walkways, colonnades, shading, liner units, building lobbies.

Parking structures are proposed in a podium under the residential buildings. Where the podium extends outside of the residential building the top level of the deck will incorporate outdoor amenity spaces that no garage structures are visible. Outdoor amenity areas are designed to properly buffer parking areas with plant materials.

A comprehensive internal pedestrian network will connect the buildings in the community and provide for access locations external to the community. Where public transit is available, the sidewalks within the public rights-of-way will provide connectivity. Where pedestrian circulation crosses vehicular routes a change in paving, materials, textures or color will be proposed.

Bicycle parking will be provided at buildings where it does not conflict with pedestrians and is easily accessed for residents of the community.

4. On-site Amenities and Special Features

Communal spaces and amenity areas are designed with walking distance, with climate and users' physical comfort in mind. Communal public areas and amenity spaces serve as the activity hubs of the community. Placing them at a centralized location is not only convenient for most residents/users, but provide functional, internal linkages. Outdoor dining areas are located in multiple parts of the community and serve as important features of the building and courtyards alike.

Shading is provided for all outdoor dining areas and patios. A combination of shade trees and architectural awnings are proposed to minimize solar impact. Tree canopies and other structured shade will be provided in outdoor amenity and along the pedestrian pathways.

Enhanced pedestrian areas and courtyards will incorporate focal points, features, furnishings and amenities to provide functional shade, and encourage use by residents of the proposed community. Access to these areas will be provided via a comprehensive pedestrian network. Certain pedestrian networks may be lighted for nighttime use and for safety.

5. Service, Refuse Collection and Utilities

Trash, loading and services are located away from public street views, in a screened/enclosed area attached to the building(s). Odor controlled trash compactors will be located at the building loading docks. The loading areas are clustered with service zones are provided in the community, serving several nearby buildings. Above ground utility equipment will be located in areas that are less visible or, where permitted by the utility provider, screened from view.

6. Architecture

The building design is influenced by the context and location, devoid of any rigid corporate prototype. The project is compatible in scale to similar projects in the immediate surrounding area.

a. Massing: The base of buildings will utilize masonry material(s) to differentiate from the upper levelers. Landscaping will be provided at the base of the buildings and wall where be incorporated when site grading requires. Awnings at entries, sunshades at windows, covered walkways and building articulation will be utilized to establish clear, defined building bases. Varied building heights, roof forms and materials, and shading structures will create a well-defined building top.

The mass of the proposed project is reduced through the use of individual buildings creating courtyards and open spaces throughout the site. Pedestrian bridges and links will connect these buildings to support the internal function and programming of the project. Amenities areas will have distinctly different massing and scale from the residential buildings, which further helps with breaking down the massing of the entire project.

Parapets are sized proportionally to overall elevations, tall enough to screen roof top equipment, and will not exceed one-third the dimension of grade to top of roof measurement on any particular elevation. Reduction in building mass is achieved through a variation in building depth, projections, balcony sizes, roof heights, façade materials, and window sizes. Strategic placement of programmed amenity spaces in the Project will also contribute to a reduction in building mass.

Sonoran Modern aesthetic is achieved by clean building lines that creates elegant buildings without excessive ornamentation.

b. Design of Pedestrian Frontages: Building frontages and sides of buildings will be oriented to the internal street network or resident amenity areas. The elevation designs incorporate a combination of arcades, pedestrian level display windows, storefronts, and store like entrances.

Multiple building entries (pedestrian and vehicular) will be located throughout the project, with storefront openings at base of buildings with amenity/community functions behind it. Buildings frontages will exhibit human scale detail on windows and other openings along ground floor pedestrian areas.

c. Climatic Response: Regarding the desert environment, contextual response to the overall design of the campus was a large driving force in creating a place that belongs to both its place and time. The design team researched predecessors of Scottsdale and Phoenix area's rich architectural /urban design history and was inspired by the Arizona Sonoran Desert aesthetic and built environments. Responses to climate, to views, and to the character of the area were instrumental in the development of design of the projects, and the hope to preserve and enhance the character of the site.

Buildings will be designed according to local codes and to meet climate requirements. Architectural climate control devices will utilize elements such as thickened walls to create recessed windows at select locations, deeper eaves/overhangs, deeper patios and balconies, sunshades and trellises. Covered walkways and temperature-controlled building links are both provided throughout the development. To help provide shade, metal awnings are

attached to west facing windows and where possible, windows or storefront will be recessed.

d. Architectural Details, Materials and Colors: Building entrances will be distinguished by the use of massing and projections, awnings over doors, and roof variation. Muted colors derived from nature and less contrasting colors are used on the building as a contextual response. Masonry or heavier materials are used at the base of the buildings, while visually lighter, smoother texture materials are the dominant features of upper floors. Building design will provide consistent architectural details and character for all buildings throughout the project with screening being an integral part of the architecture. Screening devices, site walls and enclosed service, loading and refuse areas are designed to be an integral part of the building(s).

7. Landscape Design

Landscape design for the community will include the use of a transitional low water use Sonoran Desert plant palette. The perimeter of the community will be designed to complement and integrate the adjacent street scene with structured tree canopy, informal massings of shrub and ground cover materials with accents appropriate adjacent to public sidewalks. Interior to the community will be several derivatives of the proposed palette providing structure and formality where visual impacts are desired as well as transitioning to more informal combinations to allow for development of specific plant zones to express unique desert plant experiences. Tree canopy will be thoughtfully placed throughout the community to provide shade and to reduce heat gain within the site. Where available, site salvaged trees will be utilized in high-visibility areas to create visual impact.

Where large areas of glazing are proposed within the architecture, special attention will be placed on utilizing the proper scale plant materials to ensure continuity with the indoor space to the outdoor environment. Landscape will be provided at the base of buildings based on the surrounding programming and desired aesthetic within the specific planned plant materials zone.

At the perimeter of the project where two public streets intersect, landscape will be utilized to create aesthetic impact through structured tree canopies and layered shrub and groundcover materials creating visual impact. In addition, a landscape buffer is provided on the perimeter of the project.

Parking areas have been designed to integrate landscape planters allowing for adequate tree canopy and decorative shrub and groundcover materials to enhance the aesthetics of the space. Plant materials will be selected to ensure long-term growth potential and to maximize shade benefits. Landscape materials will be utilized to screen unattractive site elements.

A pedestrian access hierarchy has been established which provides for a variety of pedestrian related circulation methods. Trails will serve to provide access to site programming areas as well as overall trails loops within the community. Well placed tree canopy and lower-level landscape materials will provide shade over the trails and varying aesthetic value within the

corridors based on the adjacent programming or landscape zone.

8. Lighting

Site lighting will be designed to minimize overall light “glow” within the community while providing a balance of light level for safe pedestrian and automobile movement while providing for aesthetic value within the landscape and as a part of the architecture. Light levels will be established based on the overall needs of the users within the community while conforming to the requirements within the IESNA Lighting Handbook. Lighting will be designed using LED technology to minimize brightness levels within and external to the community. Where light poles are utilized, full cutoff fixtures with concealed light sources will be utilized to minimize any lighting bleed to adjacent properties. Where proposed, architectural lighting will be utilized to enhance architectural features, materials or designs without providing overly intense lighting or creating hot spots of light which diminish the value of the light being provided. Landscape lighting and pedestrian level lighting will be provided within the community to enhance the aesthetics and resident experience in the exterior environment.

9. Signage

Where proposed as a part of architecture, signage shall be complimentary to the architecture it is affixed or attached to while integrating the Erickson colors and corporate branding in a tasteful manner. Signage locations will be identified where proposed as a part of the architecture as buildings are designed within the community. Repetitious signage information on the same building frontage will be avoided. Community identity signage will be designed, where possible, to be comprised of individual letters which will be back-lit. Signage will be designed to minimize the visibility of raceways and transformer equipment. Wayfinding and direction signage, or other informational type of signage will be designed to meet the same level of quality and finish as the community identity signage but may not be designed as individual letters.

I. Sensitive Design Principles

The Project will comply with the City of Scottsdale Sensitive Design Principles as noted below. Careful thought and design have gone into the proposed designs in response to the surround environment, topography, and natural desert atmosphere.

Sensitive Design Principles

1. The design character of any area should be enhanced and strengthened by new development.

The Project is compatible in scale to similar projects in the immediate surrounding and is lower than the maximum allowable height to better transition to its neighbors. The building design is influenced by the context and location of the Property. As shown in the Project renderings the design is devoid of any rigid corporate prototype.

2. Development, through appropriate siting and orientation of buildings, should recognize and preserve established major vistas, as well as protect natural features such as:

Natural features of the Property have influenced site design and overall design theme/direction of the community. An arroyo feature is planned to bisect the western portion of the community adding character and aesthetic value to the community while integrating functional drainage value. Views of the mountains will be an important feature of the Project. Building orientation and variation in the building heights will be utilized to maximize views of this feature.

3. Development should be sensitive to existing topography and landscaping.

In determining finish floor elevations and layout of each building, the design team took into consideration the natural topography of site and took advantage of the grades to set building entrances. Additionally, the site blends the constructed environment at the perimeter of the Project integrating natural ground plane forms and low water use landscape materials in a desert transitional palette.

4. Development should protect the character of the Sonoran Desert by preserving and restoring natural habitats and ecological processes.

Natural features of the site (arroyo and topography) have influenced overall site design and layout. An arroyo feature is planned to bisect the western portion of the community adding character and aesthetic value to the community while integrating functional drainage value.

5. The design of the public realm, including streetscapes, parks, plazas and civic amenities, is an opportunity to provide identity to the community and to convey its design expectations.

The masterplan is designed with hierarchy of public realm. The main entrance to the Project is from 73rd Place will be clearly identified with a gatehouse that provides resort-style entrance. Adjacent to the gatehouse is a marketing center that will serve as a public gateway to the project.

Beyond the gatehouse, a motorcourt leading to a porte-cochere will serve as main entrance to the community building, followed by a series of residential entries into each building.

Internal vehicular circulation is linked together with a looped drive with sidewalk connections between interior pedestrian circulation and adjacent city sidewalks. Open spaces and courtyards are also linked together by internal sidewalks.

The adjacent streetscapes will include detached sidewalks with landscape shading, along with landscaped drainage channels along Miller Road and Princess Boulevard that increase the setback and open space along the public roadways.

6. Developments should integrate alternative modes of transportation, including bicycles and bus access, within the pedestrian network that encourage social contact and interaction within the community.

A comprehensive internal pedestrian network connects the community and provides for specific access locations external to the community. Where public transit is available, the sidewalks within the public rights-of-way will provide connectivity. Public detached sidewalks will be added along the adjacent portions of 73rd Place, Princess Boulevard, and Miller Road. Miller Road and 73rd Place will include bicycle lanes.

7. Development should show consideration for the pedestrian by providing landscaping and shading elements as well as inviting access connections to adjacent developments.

Covered walkways and temperature-controlled building links are both provided throughout the development. A pedestrian walk hierarchy has been established which provides for a variety of pedestrian related circulation methods throughout the Property.

8. Buildings should be designed with a logical hierarchy of masses:

The mass of the building is broken down by creating courtyards throughout the project using the buildings themselves. Physical and visual connections between the courtyards allow large building masses to be reduced and help in avoiding massive bulks of buildings inconsistent with surrounding projects. Amenities areas will have distinctly different massing and scale to the residential functions, which further helps with breaking down the massing of the entire project.

9. The design of the built environment should respond to the desert environment.

Where large areas of glazing are proposed within the architecture, special attention will be placed on utilizing the proper scale plant materials to ensure continuity with the indoor space to the outdoor environment. Muted colors derived from nature and less contrasting colors are used on the building as a contextual response.

The base of buildings will be mostly masonry material to differentiate it from the upper levels. Landscaping around the base of the buildings will feature low walls, especially as grading requires.

Screening will be an integral part of the architecture. Architectural climate control devices will utilize elements such as thickened walls to create recessed windows at select locations, deeper eaves/overhangs, deeper patios and balconies, sunshades and trellises.

10. Developments should strive to incorporate sustainable and healthy building practices and products.

In order to achieve a sustainable development that will stand the test of time, Erickson and the design team will utilize design strategies and construction practices that are appropriate to the region. In addition, Erickson, who will be the owner/operator of the Project, will utilize sustainable practices in ongoing operations.

11. Landscape design should respond to the desert environment by utilizing a variety of mature landscape materials indigenous to the arid region.

Where available, site salvaged trees will be utilized in high-visibility areas to create visual impact. Landscape buffers surround the Property on all sides and is designed to transition from the surrounding street network with a transitional low water use Sonoran Desert palette into various landscape zones internally which will showcase the breadth of plant materials within the local climate.

12. Site design should incorporate techniques for efficient water use by providing desert adapted landscaping and preserving native plants.

Landscape design for the community will include the use of a transitional low water use Sonoran Desert plant palette. Tree canopy will be thoughtfully placed throughout the community to provide shade and to reduce heat gain within the site.

13. The extent and quality of lighting should be integrally designed as part of the built environment.

Where proposed, architectural lighting will be utilized to enhance architectural features, materials or designs without providing overly intense lighting or creating hot spots of light which diminish the value of the light being provided.

14. Signage should consider the distinctive qualities and character of the surrounding context in terms of size, color, location and illumination.

Where proposed as a part of architecture, signage shall be complimentary to the architecture it is affixed or attached to while integrating the colors of Erickson's corporate branding in a tasteful manner. A master conceptual signage plan showing locations of proposed signs is included with the application.

J. Cultural Amenities Plan

Erickson is proposing an art component for the project. While the exact scale and location is still being determined, a final plan will be provided to the Planning Department staff for review prior to issuance of the building permit for Building 1, it is currently contemplated to be within the open space area in the southwest corner of the property.

K. Summary

The Project provides an opportunity to approve Development Plans for a high-quality senior focused residential "age in place" community. The community will be complementary to surrounding uses, be of excellent design and will provide a supportive housing typology and services that are in demand due to the large number of seniors, and soon to be seniors, that are seeking a high quality, highly amenitized lifestyle and the ability to stay in Scottsdale.

The Project plans illustrate conformance with the City's General Plan, the Character Area Plan as well as the approved Crossroads PCD and the City's Sensitive Design Principles as

discussed herein.

We look forward to your review and comments on the Project's Development Plan proposal.

Exhibit A

Erickson Senior Living Campus Economic & Fiscal Impact Report Scottsdale, Arizona



Prepared for:
Erickson Senior Living

July 2024

Prepared by:



Elliott D. Pollack & Company
5111 N. Scottsdale Road, Suite 202
Scottsdale, Arizona 85250

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Executive Summary

Erickson Senior Livings is proposing a senior community to include 1,250 independent living units and 250 care center units located at the northeast corner of 73rd Place and Princess Boulevard in Scottsdale, Arizona. Initial hard construction is projected to cost \$729 million with an additional \$66 million for the care center.

Economic Impacts

- Development of the site will provide a \$1.6 billion economic impact from construction activity. This will create 9,417 construction-related person years of employment and \$699.9 million in wages. Person years of employment are the aggregate of each construction job that is recreated throughout the development time period. The project is anticipated to take 5 to 7 years to complete. Thus, using a six-year estimate, the annual impact would include 1,569 annual jobs and \$264.3 million in annual economic activity.
- The Erickson Senior Living Campus is projected to employ up to 731 full- and part-time positions at buildout. These jobs will range from front office, security wait staff and maintenance to higher-paid professional services. In addition, new residents in the independent living units will spend part of their disposable income in the local community. At buildout and stabilization, the operations of the senior living community will generate 1,400 total jobs, \$89.7 million in direct, indirect and induced wages, and \$194.2 million in total annual economic activity. This impact includes the direct jobs and the ripple effect generated by the multipliers in the model.

Economic Impact Summary Erickson Senior Living Campus (2024 Dollars)			
Construction	Total	6-Year Completion	
Direct construction employment	5,832	972	
Total employment*	9,417	1,569	
Wages (\$mil)	\$699.9	\$116.6	
Economic Output (\$ mil)	\$1,585.9	\$264.3	
Operations (Annual at Buildout)	Living Campus	Resident Spending	Total
Direct jobs	731	149	879
Total jobs throughout economy	1,169	231	1,400
Total Wages (\$mil)	\$77.4	\$12.3	\$89.7
Economic Output (\$ mil)	\$158.5	\$35.7	\$194.2
*Total employment during construction is the aggregate of each construction job that is recreated throughout the construction time period. The respective annual averages can be derived by dividing the expected number of years it may take to complete the development.			
Sources: Erickson Senior Living; Elliott D. Pollack & Co.; IMPLAN; Arizona Department of Revenue			



Fiscal Impacts

The Erickson Senior Living Campus units would be under the entrance deposit fee model. That is, the units are not “for sale” or “rental” but instead the resident enters into a Residence and Care Agreement that includes housing, access to healthcare, and other services. This affects the results of the study in a few ways. There is no lease tax paid on these rental agreements and residents do not pay a sales tax on meals that are included. Thus, sales tax collections are minimal on site. However, the residents living in the independent care units will likely shop in nearby retail shops and use nearby services, generating an additional impact on the City of Scottsdale.

- The construction of the proposed community would generate \$52.2 million in revenues for the State of Arizona, \$11.0 million for Maricopa County and \$13.6 million for the City of Scottsdale. These revenues include primary impacts (construction sales tax, permit and impact fees), and the secondary impacts generated by spending of onsite construction workers.
- After the project is completed, primary operations of the development (property taxes), impacts from residents living in the community (sales tax on resident spending, income taxes, utility taxes and increased state shared revenue) and the secondary impacts from employee spending would create an estimated \$2.1 million each year for the State of Arizona, \$1.5 million for Maricopa County and \$1.5 million for the City of Scottsdale. Additional property taxes would be collected by school and special districts, estimated to be \$2.7 million per year.



Fiscal Impact Summary Erickson Senior Living Campus (2024 Dollars)						
		State of Arizona	Maricopa County	Scottsdale	School & Special Districts	TOTAL
Construction						
Primary Impacts	Construction sales tax	\$27,828,300	\$3,939,400	\$9,848,400	--	\$41,616,100
	Use Tax	\$560,000	--	\$175,000	--	\$735,000
	Permit & impact fees	--	--	\$1,906,200	--	\$1,906,200
Secondary Impact from Employees	Secondary total	\$23,816,900	\$7,085,400	\$1,669,000	--	\$32,571,300
Total Impact from Construction		\$52,205,200	\$11,024,800	\$13,598,600	--	\$76,828,600
Operations (annual at buildout)						
Primary Impacts	Property Tax	--	\$430,900	\$351,100	\$2,662,000	\$3,444,000
	Sales tax	\$190,500	\$31,100	\$58,300	--	\$279,900
	Income Tax	\$194,300	--	--	--	\$194,300
	Utility tax	\$64,300	\$10,500	\$26,300	--	\$101,100
	State shared revenue	N/A	\$597,600	\$893,000	--	\$1,490,600
Secondary Impact from Employees	Secondary total	\$1,615,500	\$474,700	\$146,900	--	\$2,237,100
Total Annual Impact from Operations		\$2,064,600	\$1,544,800	\$1,475,600	\$2,662,000	\$7,747,000
*Primary impacts include direct taxes generated by the project or the residents. Secondary taxes are generated by the spending of the employees. NOTE: All of the above figures are representative of the major revenue sources for the governments. Sources: Erickson Senior Living; Elliott D. Pollack & Co.; IMPLAN; ADOR						



1.0 Introduction

Elliott D. Pollack & Company was retained to perform an analysis of the economic and fiscal impacts of the construction and operations of the Erickson Senior Living Campus to be located in Scottsdale, Arizona. This analysis will help to quantify the future impacts that the project will generate for the regional economy and the City of Scottsdale.

This study focuses on the economic and fiscal impacts of the following:

1. Construction of the project.
2. Impact of operations once construction is completed.
3. Impact from resident spending created in the City of Scottsdale.

Both economic and fiscal impacts of the project will be described. Economic impact analysis examines the regional implications of an activity in terms of three basic measures: output, earnings and job creation. Fiscal impact analysis, on the other hand, evaluates the public revenues and costs created by a particular activity. In fiscal impact analysis, the primary revenue sources of a municipality, county or state government are analyzed to determine how the activity may financially affect them.

This study prepared by Elliott D. Pollack & Company is subject to the following considerations and limiting conditions.

- It is our understanding that this study is for the client's and City of Scottsdale's due diligence and other planning purposes. Neither our report, nor its contents, nor any of our work were intended to be included and, therefore, may not be referred to or quoted in whole or in part, in any registration statement, prospectus, public filing, private offering memorandum, or loan agreement without our prior written approval.
- The reported recommendation(s) represent the considered judgment of Elliott D. Pollack & Company based on the facts, analyses and methodologies described in the report.
- Except as specifically stated to the contrary, this study will not give consideration to the following matters to the extent they exist: (i) matters of a legal nature, including issues of legal title and compliance with federal, state and local laws and ordinances; and (ii) environmental and engineering issues, and the costs associated with their correction. The user of this study will be responsible for making his/her own determination about the impact, if any, of these matters.
- This study is intended to be read and used as a whole and not in parts.
- This study has not evaluated the feasibility or marketability of any site for planned uses.



- All estimates regarding construction and operating data were provided by the client, their partners, and estimates from building professionals. Data has been reviewed and verified to determine its reasonableness and applicability to the projects.
- This economic and fiscal impact study evaluates the potential “gross impacts” of construction and operations activities. The term “gross impacts” as used in this study refers to the total revenue, jobs and economic output that would be generated by the construction and operations. The study does not consider the potential impact on other businesses in the trade area that may occur as a result of the proposed project.
- This analysis does not consider the costs to local governments associated with providing services to the project. Such analysis is beyond the scope of this study. In addition, the analysis is based on the current tax structure and rates imposed by the State, counties, and local governments. Changes in those rates would alter the findings of this study.
- Many dollar amounts are stated in current dollars and, unless indicated, do not take into account the effects of inflation.
- Our analysis is based on currently available information and estimates and assumptions about immediate as well as long-term future development trends. Such estimates and assumptions are subject to uncertainty and variation. Accordingly, we do not represent them as results that will be achieved. Some assumptions inevitably will not materialize and unanticipated events and circumstances may occur; therefore, the actual results achieved may vary materially from the forecasted results. The assumptions disclosed in this study are those that are believed to be significant to the projections of future results.



2.0 Assumptions & Methodology

2.1 Project Description & Assumptions

Erickson Senior Livings is proposing a senior community to include 1,250 independent living units and 250 care center units located at the northeast corner of 73rd Place and Princess Boulevard in Scottsdale, Arizona. The initial site plan includes 14 residential buildings. The main building would also include dining, lobby, life enrichment area, fitness/wellness, game rooms, libraries, and a media center.



The assumptions used to estimate the economic and fiscal impacts of the construction and operations of the senior living community have been developed from a variety of sources. The development plan for the property was provided by the client, which outlined the initial number of units, average size per unit, and occupancy.

The Erickson Senior living community would contain 1,250 independent living units and 250 care center units. Total development costs are expected to reach \$791.0 million with furniture, fixtures & equipment (FF&E) to be \$74.8 million in total costs for the 250 care center units with \$3.8 million in FF&E. FF&E is subject to a state and local use tax.

Project Site Plan Assumptions Erickson Senior Living Campus (2024 Dollars)		
	<u>Independent Living</u>	<u>Care Center</u>
Units	1,250	250
Gross square feet	1,940,000	300,000
Total Development Costs	\$791,000,000	\$74,797,325
Hard Construction Costs	\$729,000,000	\$66,000,000
Soft Costs	\$55,750,000	\$5,047,325
Estimated FF&E	\$6,250,000	\$3,750,000
Total estimated net assessed value	\$357,750,000	*inc.
Source: Erickson Senior Living		

All units are under the entrance deposit fee model and must also pay a monthly service fee with an additional monthly service fee for a second person in a residence. That is, the units are not “for sale” or “rental” but instead the resident enters into a Residence and Care Agreement that includes housing, access to healthcare, and other services. This affects the results of the study in a few ways. There is no lease tax paid on these rental agreements and residents do not pay a sales tax on meals that are included. Thus, sales tax collections are minimal on site. However, the residents living in the independent care units will likely shop in nearby retail shops and use nearby services, generating an additional impact on the City of Scottsdale.

Average resident income of the independent living units were estimated to average from \$50,000 to \$75,000. The estimated annual taxable spending of residents in this report is calculated based on the U.S. Consumer Expenditure Survey using an average household income for community residents.

The Erickson Senior Living Campus is projected to initially employ 110 full and part-time positions. At buildout and stabilization, the development will employ up to 731 full- and part-time positions. These jobs will range from front office, security, wait staff and maintenance services to higher-paid professional services. The proposed Care Center will include on-site medical services to provide for the ongoing medical needs of the community's residents such as doctors with specialization in geriatric medicine, as well as additional medical personnel.



2.2 Economic Impact Methodology

Economic impact analysis examines the economic implications of an activity in terms of output, earnings, and employment. For this study, the analysis focused on the construction impacts as well as the ongoing operations including direct expenditures by the residents.

The different types of economic impacts are known as direct, indirect, and induced, according to the manner in which the impacts are generated. For instance, direct employment consists of permanent jobs held by project employees. Indirect employment includes those jobs created by businesses that provide goods and services essential to the operation or construction of the project. These businesses range from manufacturers (who make goods) to wholesalers (who deliver goods) to janitorial firms (who clean the buildings). Finally, the spending of the wages and salaries of direct and indirect employees on items such as food, housing, transportation and medical services creates induced employment in all sectors of the economy, throughout the region. These secondary effects are captured in the analysis conducted in this study.

Multipliers have been developed to estimate the indirect and induced impacts of various direct economic activities. IMPLAN developed the multipliers used in this study and were selected based on the land use type. Office space, for example, uses an average multiplier that represents various business services while the manufacturing uses used an average multiplier that represents light industrial. The multipliers used for this project represent the construction of multi-family dwellings, service to buildings, and those related to the spending of residents on retail sales, entertainment, services and restaurant and bars.

The multipliers specific to Greater Phoenix are used in this study. This means that the indirect and induced figures represent jobs created throughout the region. The direct impacts would be on the City of Scottsdale specifically.

The economic impact is categorized into three types of impacts:

- (1) **Employment Impact** – the total wage and salary and self-employed jobs in a region. Jobs include both part-time and full-time workers.
- (2) **Earnings Impact** – the personal income, earnings or wages, of the direct, indirect and induced employees. Earnings include total wage and salary payments as well as benefits of health and life insurance, retirement payments and any other non-cash compensation.
- (3) **Economic Output** – also referred to economic activity, relates to the gross receipts for goods or services generated by the company's operations.



Economic impacts are by their nature regional in character. Such impacts are best illustrated when not assigned to a specific municipality or locality, although clearly the primary impact of job creation would be on the municipality and county where the project is located. However, many other communities in the surrounding region would also benefit from the operations of the project.

2.3 Fiscal Impact Methodology

Fiscal impact analysis studies the public revenues associated with a particular economic activity. The primary revenue sources of local, county, and state governments (i.e., taxes) are analyzed to determine how an activity may affect the various jurisdictions. This section will evaluate the impact of the project on local government revenues.

The fiscal impact figures cited in this report have been generated from information provided by a variety of sources including the U.S. Bureau of the Census; the U.S. Department of Labor; the Internal Revenue Service; the State of Arizona; the Arizona Tax Research Association; and the U.S. Consumer Expenditure Survey. Elliott D. Pollack & Company has relied upon the estimates of operating revenues outlined in this study.

Fiscal impacts are categorized by type in this study, similar to economic impact analysis. The major sources of revenue generation for governmental entities are calculated based on ongoing operations. Primary revenues are considered the direct taxes paid by the development such as property taxes as well as taxes paid on taxable purchases in the local economy. Secondary revenues are generated by the employees. That is, employees will spend part of their salaries on local goods and services and pay taxes on the homes they occupy. This spending will contribute to revenues collected by the State that are ultimately shared with local governments.

The following is a description of the applicable revenue sources that will be considered for this analysis.

- **Construction Sales Tax**

The State, counties, and local governments levy a sales tax on the construction of buildings or development of land improvements. The tax base for the prime contracting classification is 65% of the gross proceeds of sales or gross income derived from the business.

The sales tax on construction materials is a one-time collection by the governmental entity. The State currently levies a temporary 5.6% sales tax on construction activity (a



portion of which is shared with local governments) while Maricopa County levies a rate of 0.7% and the City of Scottsdale construction sales tax rate is 1.75%.

- Use Tax

The State of Arizona and local governments levy a use tax on equipment that is purchased outside the jurisdiction and brought in for use within the jurisdiction. The furniture, fixtures and equipment of the development are presumed to be levied a use tax in this analysis.

- Transaction Privilege Tax

The State, counties, and local cities in Arizona charge sales tax on retail goods and utility usage. Cities also levy a tax on commercial leases. The sales tax rate for the State is 5.6%. Portions of this tax are redistributed through revenue sharing to counties and cities throughout Arizona based on population. The County's sales tax rate is 0.7% (0.5% for commercial leases) while the City of Scottsdale levies a rate of 1.75%. These tax rates are applied to direct utility usage and taxable resident spending, as well as to the spending of direct, indirect and induced employees. Most of the employees supported by the project reside within a municipality or, at the very least, purchase goods from retailers located within a municipality. Based on data from the U.S. Consumer Expenditure Survey, the projected extent of retail spending and resulting sales tax receipts was calculated.

- Property Tax

The development will be subject to real property taxes based on the assessed value of the property at that time. In addition, employees supported by operations will pay property taxes on the homes they occupy. In order to estimate property taxes, the assessed full cash value of the occupied space along with the projected value of a typical housing unit has been calculated. The total property tax rate for the site is currently \$9.6267 per \$100 of the limited property value. This rate includes taxing jurisdictions of Maricopa County, City of Scottsdale, local school districts and other special districts.



Property Tax Rates by Jurisdiction Erickson Senior Living Campus	
DISTRICT	RATE
City of Scottsdale	0.9814
Maricopa County	1.2044
Central Az Water Conservation District	0.1400
Fire District Assistance Tax	0.0081
Flood Control Of Maricopa County	0.1536
Library District	0.0488
Maricopa Special Health District	0.2716
Community College District	1.1388
WEST-MEC	0.1807
Paradise Valley Unified	5.4993
School & Special Districts Total	7.4409
Grand Total	9.6267
Source: County Assessor's Office	

- State Shared Revenues

Each municipality in Arizona receives a portion of State revenues from four different sources - State sales tax (see description above), State income tax, vehicle license tax and highway user tax. The formulas for allocating these revenues are primarily based on population. Counties also share in the revenue sources of the State, with the exception of income tax.

State Income Tax

The State of Arizona collects taxes on personal income. The tax rate used in the analysis averages about 1.6% for earnings. These percentages are based on the most recently available income tax data from the State and the projected wage levels of jobs created by the construction and operations impact. This tax is applied to the wages and earnings of direct and indirect employment. Portions of this tax are redistributed to cities throughout Arizona based on population.

HURF Taxes

The State of Arizona collects specific taxes for the Highway User Revenue Fund (HURF). Both the registration fees and the motor vehicle fuel tax (gas tax) are considered in this analysis. The motor vehicle fuel tax is \$0.18 per gallon and is calculated based on a vehicle traveling the Arizona statewide average of 12,735 miles per year at 16.6 miles per gallon. Registration fees average \$65 per employee in the State of Arizona. These factors are applied to the projected direct and indirect employee count. Portions of these taxes are distributed to cities and counties throughout Arizona based on population and the origin of gasoline sales.



Vehicle License Tax

The vehicle license tax is a personal property tax placed on vehicles at the time of annual registration. This factor is applied to the projected direct, indirect and induced employee count. The average tax used in this analysis is \$343 and portions of the total collections are distributed to the Highway User Revenue Fund. The remaining funds are shared between cities and counties in accordance with population-based formulas.

The above tax categories represent the largest sources of revenues that would be generated to the various jurisdictions. The revenue impacts do not include certain revenue sources such as corporate income taxes. All tax collections represented in this analysis are gross collections and do not take into consideration any incentives or development agreements that may occur.



3.0 Construction Impacts

This section of the report outlines the economic and fiscal impact of the construction of the proposed community. Construction phase impacts are generally short-term effects related to onsite and offsite construction employment and other supporting industries. The long-term consequences of a project are the operational impacts that are described in Section 4.0.

The total development costs for the project are projected to be \$865.8 million and the direct hard construction cost of the project is estimated at \$795.0 million. The economic impacts are expressed over the entire duration of the construction.

3.1 Economic Impact of Construction

The project would generate 5,832 direct person years of employment during the construction phase. Person years of employment are the aggregate of each construction job that is recreated year after year throughout the construction time period. To derive the respective annual averages, employment, wages, and economic output can be divided by the expected number of years it may take to complete the development. An estimated \$453.6 million in direct wages would be generated based on the total construction activity.

Another 3,585 indirect and induced person years of employment would be created in the local economy. Wages for these indirect and induced employees would total about \$246.3 million. Altogether, the project would create approximately 9,417 jobs during the construction timeframe, \$699.9 million in wages and nearly \$1.6 billion in economic activity.

Economic Impact of Construction Erickson Senior Living Campus Greater Phoenix (2024 Dollars)			
Impact Type	Person Years of Employment	Wages	Economic Output
Direct	5,832	\$453,598,000	\$795,000,000
Indirect	963	\$77,571,000	\$255,829,000
Induced	2,621	\$168,695,000	\$535,118,000
Total	9,417	\$699,864,000	\$1,585,947,000
1/ The total may not equal the sum of the impacts due to rounding. All dollar figures are in constant dollars. Inflation has not been included in these figures. Source: Erickson Senior Living; Elliott D. Pollack & Company; IMPLAN			



3.2 Fiscal Impact of Construction

The construction of the proposed community would create significant tax revenues for the State, Maricopa County and the City of Scottsdale as shown on the following tables. Revenues have been defined in this analysis as either primary or secondary, depending on their source and how the dollars flow through the economy into city tax accounts. For instance, some revenues, such as construction sales taxes, are straightforward calculations based on the cost of construction. These revenues are described in this study as primary revenues.

Secondary revenues, on the other hand, flow from the wages of those direct, indirect and induced employees who are supported by the project. Revenue projections for the employees such as sales taxes and property taxes, are based on the typical wages of the employees working on the project, census data on where they might live as well as spending patterns given their average income.

The State of Arizona will receive an estimated \$28.4 million from construction sales and use tax generated during construction. An additional \$23.8 million is projected to be generated by the spending of employees for a total fiscal impact on the State of \$52.2 million. Again, these revenues would be collected during the entire development process, which is projected to take five to seven years to complete.

Fiscal Impact of Construction Erickson Senior Living Campus State of Arizona (2024 Dollars)								
Impact Type	Primary Revenues		Secondary Revenues					Total Revenues
	Construction Sales Tax	Use Tax	Spending Sales Tax	Income Tax	Unemp. Tax	Vehicle Tax	Gas Revenues	
Direct	\$27,828,300	\$560,000	\$5,018,000	\$8,045,800	\$1,102,200	\$852,900	\$448,000	\$43,855,200
Indirect	N/A	N/A	\$849,500	\$1,375,900	\$182,100	\$140,900	\$74,000	\$2,622,400
Induced	N/A	N/A	\$1,982,000	\$2,665,600	\$495,400	\$383,300	\$201,300	\$5,727,600
Total	\$27,828,300	\$560,000	\$7,849,500	\$12,087,300	\$1,779,700	\$1,377,100	\$723,300	\$52,205,200
^{1/} The figures are intended only as a general guideline as to how the State could be impacted by the project. The above figures are based on the current economic structure and tax rates of the State. Source: Erickson Senior Living; Elliott D. Pollack & Co.; IMPLAN; AZ Dept. of Revenue; AZ Tax Research Association								

Maricopa County is projected to receive a total of \$11.0 million in tax revenues during construction, including \$3.9 million from construction sales tax.



Fiscal Impact of Construction Erickson Senior Living Campus Maricopa County

(2024 Dollars)

Impact Type	Primary Revenues	Secondary Revenues			Total Revenues
	Construction Sales Tax	Employee Spending Sales Tax	Employee Property Tax	State Shared Revenues	
Direct	\$3,939,400	\$715,700	\$1,680,300	\$2,561,000	\$8,896,400
Indirect	N/A	\$121,200	\$277,600	\$183,800	\$582,600
Induced	N/A	\$282,700	\$755,300	\$507,800	\$1,545,800
Total	\$3,939,400	\$1,119,600	\$2,713,200	\$3,252,600	\$11,024,800

1/ The figures are intended only as a general guideline as to how the County could be impacted by the project. The above figures are based on the current economic structure and tax rates of the County.

Source: Erickson Senior Living; Elliott D. Pollack & Co.; IMPLAN; AZ Dept. of Revenue; AZ Tax Research Association

Primary revenues generated to the city from the construction sales tax, use tax and permit or impact fees total \$11.9 million. In addition, the city would benefit from the spending of construction workers within city limits. Other secondary revenues include property taxes and State shared revenues. In total, the City of Scottsdale would expect to collect about \$1.7 million in tax revenue from construction and construction-related activity.

Erickson Senior Living Campus Scottsdale

(2024 Dollars)

Impact Type	Primary Revenues			Secondary Revenues			Total Revenues
	Construction Sales Tax	Use Tax	Permit & Impact Fees	Employee Spending Sales Tax	Employee Property Tax	State Shared Revenues	
Direct	\$9,848,400	\$175,000	\$1,906,200	\$339,800	\$543,200	\$190,300	\$13,002,900
Indirect	N/A	N/A	N/A	\$57,500	\$89,700	\$21,500	\$168,700
Induced	N/A	N/A	N/A	\$134,200	\$244,200	\$48,600	\$427,000
Total	\$9,848,400	\$175,000	\$1,906,200	\$531,500	\$877,100	\$260,400	\$13,598,600

1/ The figures are intended only as a general guideline as to how the City could be impacted by the project. The above figures are based on the current economic structure and tax rates of the City.

Source: Erickson Senior Living; Elliott D. Pollack & Co.; IMPLAN; AZ Dept. of Revenue; AZ Tax Research Association



4.0 Ongoing Operations Impacts

Once construction is completed, the impact of the operations and residents living at the Erickson Senior Living Community would begin to produce jobs and tax revenue. The project would generate taxes for the City of Scottsdale. The residents occupying the 1,250 independent living dwelling units would also spend their disposable income within the local economy as well as increase the city's proportion of state shared revenue. Additionally, this spending will support a significant number of jobs locally.

4.1 Economic Impact of Operations & Resident Spending

Community Operations Impact

The Erickson Senior Living Campus is projected to employ up to 731 full- and part-time positions. These jobs will range from front office, security, wait staff and maintenance services to higher-paid professional services. The proposed Care Center will include on-site medical services to provide for the ongoing medical needs of the community's residents such as doctors with specialization in geriatric medicine, as well as additional medical personnel.

Taking into account the ripple effect of the regional multipliers, approximately 1,169 permanent direct, indirect, and induced jobs would be supported throughout the area as a result of the project. The majority of these jobs would be related to resident services, building services and maintenance. A total of \$77.4 million in annual wages would be created and \$158.5 million in annual economic output would be added to the regional economy.

Resident Spending Impact

Residents spending in the local economy would also create an impact. Based on the \$23.9 million in estimated direct spending, this would create approximately 231 permanent direct, indirect, and induced jobs earning \$12.3 million in wages, and \$35.7 million in annual economic output annually.

TOTAL Impact

In total, the multi-family community and its new residents are projected to support 1,400 jobs, \$89.7 million in wages, and \$194.2 million in annual economic activity. The table below details the economic impact of operations as well as resident spending by category that is expected to occur on an annual basis.



Annual Economic Impact of Operations (at Stabilization) Erickson Senior Living Campus Greater Phoenix (2024 Dollars)				
	Impact Type	Jobs	Wages	Economic Output
Residential Operations	Direct	731	\$48,859,000	\$69,977,000
	Indirect	181	\$11,934,000	\$35,862,000
	Induced	258	\$16,586,000	\$52,616,000
	Total	1,169	\$77,379,000	\$158,455,000
Employment Supported by Resident Spending	Direct	149	\$6,496,000	\$16,764,000
	Indirect	36	\$2,835,000	\$9,570,000
	Induced	46	\$2,966,000	\$9,404,000
	Total	231	\$12,297,000	\$35,738,000
GRAND TOTAL	Direct	879	\$55,355,000	\$86,741,000
	Indirect	217	\$14,769,000	\$45,432,000
	Induced	304	\$19,552,000	\$62,020,000
	Total Impact^{1/}	1,400	\$89,676,000	\$194,193,000
^{1/} The total may not equal the sum of the impacts due to rounding. All dollar figures are in constant dollars. Inflation has not been included in these figures. Source: Elliott D. Pollack & Company; IMPLAN				

4.2 Fiscal Impact of Operations & Resident Spending

Once the project is completed and occupied to a stabilized level, the operations of the community and residents living onsite would produce tax revenue for the State of Arizona, Maricopa County and the City of Scottsdale.

The following tables show the ongoing tax revenue that each of the jurisdictions would expect to collect from the community as well as from the spending of residents. Sales tax collections on resident incomes are based on the estimated average household income and spending patterns outlined in the U.S. Consumer Expenditure Survey. While residents will likely spend the majority of their disposable incomes in the City of Scottsdale, they will also shop in neighboring cities. For this analysis, a 25% leakage rate was used for the capture of city sales tax revenue (i.e. 75% of taxable spending will occur in Scottsdale).

The State of Arizona is projected to receive \$2.1 million in primary and secondary revenues generated by the residential community. Primary revenues include \$190,500 in estimated sales tax revenues from resident spending on taxable items off-site, \$194,300 in income tax levied on employee wages and \$64,300 in projected utility taxes. Secondary revenues are estimated to be \$1.6 million from taxes paid by employees such as property taxes, sales taxes, vehicle taxes and unemployment tax.



Annual Fiscal Impact of Operations Erickson Senior Living Campus State of Arizona (2024 Dollars)	
	MF / New Residents
Primary Revenue	
Sales tax	\$190,500
Income Tax	\$194,300
Utility Tax	\$64,300
Sub-Total	\$449,100
Secondary Revenue	
Employee Spending Sales Tax	\$1,520,300
Unemployment Tax	\$43,700
Vehicle Tax	\$33,800
Gas Tax	\$17,700
Sub-Total	\$1,615,500
Total Revenue	
GRAND TOTAL	\$2,064,600
1/ The total may not equal the sum of the impacts due to rounding. All of the above figures are representative of the current major revenue sources for the State. The figures are intended only as a general guideline as to how the State could be impacted by the project.	
Source: Erickson Senior Living; Elliott D. Pollack & Co.; ADOR; ATRA	



Maricopa County is projected to receive a total of \$1.5 million each year at stabilizations. This includes both primary direct taxes and secondary impacts from employees.

Annual Fiscal Impact of Operations Erickson Senior Living Campus Maricopa County (2024 Dollars)	
	MF / New Residents
Primary Revenue	
Property Tax	\$430,900
Sales tax	\$31,100
Utility Tax	\$10,500
Increased state shared revenue	\$597,600
Sub-Total	\$1,070,100
Secondary Revenue	
Employee Spending Sales Tax	\$216,800
Employee Property Tax	\$109,300
State Shared Revenues	\$148,600
Sub-Total	\$474,700
Total Revenue	
GRAND TOTAL	\$1,544,800
1/ The total may not equal the sum of the impacts due to rounding. All of the above figures are representative of the current major revenue sources for the County. The figures are intended only as a general guideline as to how the County could be impacted by the project.	
Source: Erickson Senior Living; Elliott D. Pollack & Co.; ADOR; ATRA	

In total, an estimated \$1.5 million would be collected each year (in 2024 dollars) by the City of Scottsdale. Direct property taxes from the development, sales tax (from resident spending off-site), and increased state shared revenues make up a major part of the primary tax collections. Secondary impacts from employee spending and other taxes would be an estimated \$146,900 each year. This figure takes into account that only about 16.6% of employees will live and spend their disposable income within the City of Scottsdale.



In addition to the city taxes, the special districts and Scottsdale school districts will benefit from the new development. An estimated \$2.7 million would be collected each year by these jurisdictions.

Annual Fiscal Impact of Operations Erickson Senior Living Campus Scottsdale (2024 Dollars)	
	MF / New Residents
Primary Revenue	
Property Tax	\$351,100
Sales tax	\$58,300
Utility Tax	\$26,300
Increased State Shared Revenue	\$893,000
Sub-Total	\$1,328,700
Secondary Revenue	
Employee Spending Sales Tax	\$103,000
Employee Property Tax	\$35,300
State Shared Revenues	\$8,600
Sub-Total	\$146,900
Total Revenue	
City Total	\$1,475,600
Additional property taxes for school & special districts	
Special Districts	\$694,600
School Districts	\$1,967,400
School and special district total	\$2,662,000
Grand Total	
City, school and special districts grand total	\$4,137,600
^{1/} The total may not equal the sum of the impacts due to rounding. All of the above figures are representative of the current major revenue sources for the City. The figures are intended only as a general guideline as to how the City could be impacted by the project.	
Source: Erickson Senior Living; Elliott D. Pollack & Co.; ADOR; ATRA	



Exhibit B



Erickson Senior Living

2023 Sustainability Report

Background on **Erickson Senior Living**

**We help
people live
better lives.®**

From Denver to Boston, Detroit to Palm Beach Gardens, over 30,000 seniors are living better lives at an Erickson Senior Living®-managed and -developed community. We are proud to be one of the nation's most respected leaders in building and managing continuing care retirement communities.

41

YEARS

Our national network of communities has been serving seniors for over four decades.

30

**THOUSAND+
RESIDENTS**

Each year, more and more seniors are choosing the Erickson Senior Living lifestyle.

16

**THOUSAND+
EMPLOYEES**

We hire bright and passionate employees who want a career that's meaningful and inspiring.



Avery Point

Board Relationships

The Erickson Senior Living network of developed, managed, and owned communities has over 40 years of experience with a focus on helping people live better lives. Erickson Senior Living continues to expand its portfolio of campuses across the nation, while enhancing its long-term relationships with both the National Senior Communities and Charlestown® Board of Directors.

**NATIONAL SENIOR
COMMUNITIES**


Charlestown
BY ERICKSON SENIOR LIVING®

The National Senior Communities (NSC) and Charlestown Boards fully support the sustainability efforts of Erickson Senior Living and our managed communities.

Oak Crest



“At Erickson Senior Living, we strive to be good stewards of the environment. **Our sustainability strategy fits into each of our promises to our residents and staff to make health and well-being a priority, provide financial stability and benefits to those who live and work here, and to create a vibrant lifestyle for residents and teammates.**

We are excited to make continuous improvements through 2024 to maintain this promise to our communities and our environment.”



—Gregg Colon

CHIEF OPERATING OFFICER

Our Commitment to Sustainability

Sustainability remains an important focus for our communities and corporate locations. Building and managing environmentally friendly senior living campuses is not just our responsibility as a corporation, it is also what our 30,000+ residents have come to expect from us as a leader in senior living.

When it comes to specific environmental elements, prospective residents consider energy-efficient windows, low volatile organic compounds products, recycling, and LED lighting most important. Fortunately, these elements are standard or in wide use across Erickson Senior Living-managed communities.



Charlestown



We believe the key to a long, productive life is maintaining good physical, mental, and emotional health. We acknowledge that a healthy environment plays a key role in the well-being of our residents. As a leader in integrated health and wellness, we've established Embrace Well-Being, a campaign that empowers residents through a holistic approach to mind, body, and social well-being.

Introduction to Our Framework

We believe that sustainability should be integrated into the fabric of our culture and should not be an afterthought. We've developed a framework to communicate the aspects of sustainability across the organization. Our goal is to reduce, reuse, and recycle energy, waste, and water through three major initiatives:

People and Processes:

Development of products, services, innovation, and technology.



Partners:

Interacting with board members, residents, Resident Advisory Committees, Resident Councils, employees, leaders, suppliers, vendors, and more.



Physical Footprint:

Designing, constructing, updating, and reoccupying buildings.



Our People and Processes



Sustainability benefits our residents, employees, and our business. We continue to evaluate and improve existing programs, processes, and services to minimize our environmental impact and create an even better experience for all Erickson Senior Living stakeholders.

Digitization of Processes

In 2023, we focused on our Signature Dining program. We implemented the use of QR codes for surveys to ensure that resident feedback was heard. This approach not only helped us improve the quality of the dining program, but it also helped in saving paper and reducing CO₂ emissions. By electing to submit survey responses electronically, we saved about **550 tons of paper, 4 trees, equating to the absorption of about 192 pounds of CO₂ in one year!**

We also launched the UKG Time, Scheduling, and Attendance system, digitizing the scheduling process and allowing electronic submission of missed punch forms. This resulted in significant paper savings and reduced CO₂ levels. UKG was launched to the first group of communities on 10/1/2023. By the end of the year, over 60,000 missed punches were requested in the system. This saved about **610 tons of paper, or about 5 trees, equating to the absorption of about 240 pounds of CO₂ in one year!**

Additionally, it takes a lot of water to make paper. Our electronic dining survey saved about 3,300 gallons of water, and the digitization of missed punch forms saved about 3,600 gallons of water. That's enough drinking water to hydrate about 38 adults for an entire year!

	Time, Scheduling, and Attendance	Dining QR
	610 tons of paper equates to 5 trees saved. Per year, 5 mature trees will absorb about 240 pounds of CO₂!	550 tons of paper equates to 4 trees saved. Per year, 4 mature trees will absorb about 192 pounds of CO₂!
	3,600 gallons of water saved. That's enough drinking water to hydrate about 20 adults for an entire year!	3,300 gallons of water saved. That's enough drinking water to hydrate about 18 adults for an entire year!



Our People and Processes (continued)

Recycling Update

On average, each community across the enterprise saves approximately 41 tons of paper, 30 tons of plastic, 18 tons of aluminum, and 100 tons of cardboard.

Our communities also assist with safely and securely recycling hundreds of residents' electronic devices such as computers, laptops, printers, phones, and much more. Employee work devices are also recycled when they reach the end of their product life—including over 2,700 electronics in 2023. That is almost twice the amount that was recycled in 2022!

Recycling by the Numbers



30 TONS
of plastic



41 TONS
of paper



18 TONS
of aluminum



100 TONS
of cardboard

2,700 electronics



1,000
desktops



700
laptops



150
tablets



600
monitors



Devonshire

Our Partners

Across the enterprise, residents and employees have embraced sustainability and incorporated it into their culture and campus. Here are just a few examples of new environmental features and programs at some of our communities.

Resident Food Scrap Collection

At Riderwood Village®, in Silver Spring, Maryland, the passionate resident green group started a food scrap collection program. The program began at the end of the year, and in less than 3 months, 385 residents participated and collected about 7 tons of food scraps!

Food waste isn't given the chance to naturally decompose in landfills, causing methane to be released into the atmosphere. Riderwood partners with a local vendor to collect food scraps, which will then go to a composting site, reducing the amount of greenhouse gases affecting our planet.



Resident Food Scrap Collection

385 residents participated and collected about 7 tons of food scraps!



Native Tree Planting

The Wind Crest grounds team planted a Thin Leaf Alder Tree to symbolize strength and protection for the community



Community Treasure Sales

Residents contributed to the Treasure Sale, with proceeds benefitting the Benevolent Care, Scholars' Fund, and Staff Appreciation funds.

Native Tree Planting

In 2023, for Earth Day, the Wind Crest® grounds team in Highlands Ranch, Colorado, planted a Thin Leaf Alder Tree in their Cottonwood Court and Blue Spruce courtyard to symbolize strength and protection for the community. The Thin Leaf Alder is one of many listed on Colorado State University's list of resilient native trees.

Community Treasure Sales

In 2023, our residents donated many gently used goods to their campus Treasure Sale, Treasure Store, Treasure Shoppe, or Treasure Chest. Although differing in name, almost all communities by Erickson Senior Living have a shop in which residents can donate items. Commonly donated items include jewelry, housewares, decorations, clothing, books, DVDs, furniture, and many more. By donating and buying used goods, less items are thrown away into landfills. Not only does this help protect the environment, but these shops provide a great sense of purpose for the resident volunteers! Sales are open to residents, Erickson Senior Living team members, and the greater communities outside of our gates. Proceeds from sales are donated into three different funds: The Benevolent Care/Resident Care Fund, Scholars' Fund, or the Staff Appreciation Fund.

Our Physical Footprint

We keep sustainability top of mind when designing and constructing new senior living communities. We also consider environmental impact when updating existing Erickson Senior Living properties. The following examples demonstrate just a few of the steps we've taken to reduce our environmental footprint.

1,520



Single family homes' worth of electricity saved with the use of VRF

Sustainable Heating and Cooling Systems

In several of our newly constructed buildings, we have adopted a new heating and cooling system called VRF. This system saves energy over traditional heating and cooling systems. From 2016 to 2023, we constructed more than 3,358 of these units across more than 30 residential buildings, saving enough kilowatt hours to power 1,520 single-family homes for over an entire year.

24.1MM+



Kilowatt hours saved with LED lightbulbs (retrofit and new construction)

Efficient Lighting

Erickson Senior Living continues to retrofit existing buildings with energy-efficient LED lights. Since implementing this change, we have saved over 24.1 million kilowatt hours, increasing our savings by 3.5 kilowatt hours since 2022. Other steps are being taken to further reduce energy consumption, such as occupancy sensors in all community common areas such as entrances, dining rooms, and meeting areas. These sensors will turn off lights automatically, reducing the use of electricity when no one is occupying the space.

95.8MM+



Gallons of water saved with VRF & VRP HVAC systems

Water Conservation

Our utilization of VRF & VRP HVAC systems continues to save kilowatt hours and water. In 2023, our total annual savings was 95.8 million gallons of water, an increase of 18.3 million gallons since 2022. To further our water conservation efforts, the use of water bottle filling stations is now a standard practice. The incorporation of one water filling station alone could save approximately 4,000 gallons of water a year!



What's Next?

In 2024, we plan to continue to improve upon our current practices as we seek to find new ways to incorporate sustainability efforts into our communities. Here are just a few examples of what's in store:



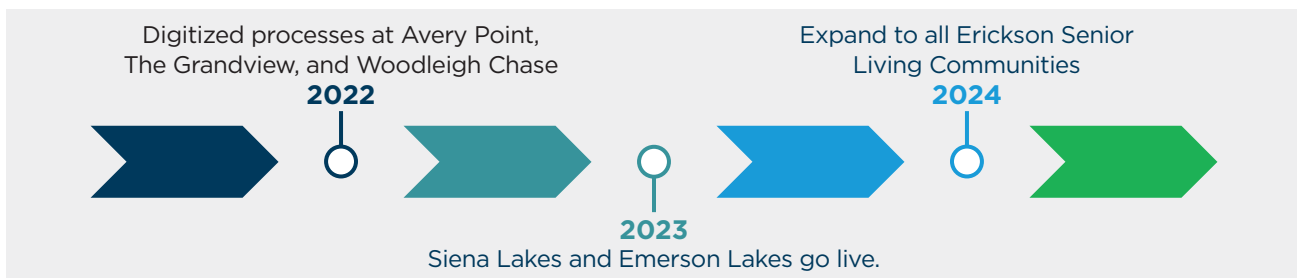
Green Fleet

In 2024, we plan to add 12 hybrid sedans and 5 hybrid SUVs to our fleet!

Expanding our Paper Savings

In 2023, Siena Lakes® and Emerson LakesSM joined Avery Point,®

The Grandview,SM and Woodleigh ChaseSM in going live with our new automated digital process, saving over 1,100 pounds of paper, or about 9 trees. This process completely digitizes and transforms the contracting experience for new residents! The release and refund process has been digitized as well. This year, we expect to go live with the remaining 19 communities, tremendously increasing our paper saving opportunities.



Healthier Choices

Our Dining Services team is exploring more ways to add healthier options to community menus. The Healthier Choice menu items will allow residents and employees to choose from healthy options, including, but not limited to, more plant-based, vegetarian, and vegan options. These will not only provide additional food options for our health, but they are better for the planet as well! Plant-based foods support the reduction of greenhouse gases, water pollution, and less land usage.



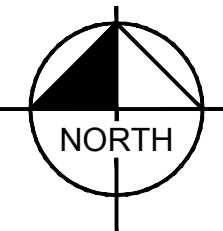
We made great strides to improve our sustainability efforts in 2023, and we will continue to enhance our practices and be great stewards of the environment in 2024.



KRE HIP HP/HH SCOTTSDALE OWNER LLC APN: 215-07-398 ZONING: PC-D	THE VIEW AT CASCADE LUXURY APARTMENTS LLC APN: 215-07-390 ZONING: PC-D
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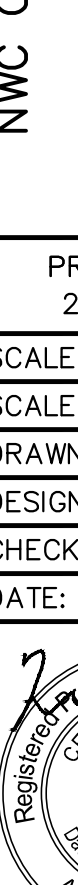
	Contributions Phoenix, Arizona 85016 (602) 944-5500
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1 OF 2 SHEETS

K:\PHV_Giv\291697000 Erickson Scottsdale\CA001697000Pre-SP.dwg, Layout:PRE-SP2 Jun 02, 2025 - 2:58pm Laurel Wright



<p>NWC OF MILLER ROAD AND PRINCESS BOULEVARD</p> <p>PRELIMINARY SITE PLAN</p> <p>SCOTTSDALE, ARIZONA</p>		 <p>Erickson SENIOR LIVING™</p>		<p>Kimley»»Horn</p> <p>© 2025 KIMLEY—HORN AND ASSOCIATES, INC. 1661 East Camelback Road, Suite 400 Phoenix, Arizona 85016 (602) 944-5500</p>	
PROJECT No. 291697000		SCALE (H): 1"=60'		SCALE (V): NONE	
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DATE: 06/02/25					
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215-07-244A

APN:
215-07-390

APN:
215-07-398

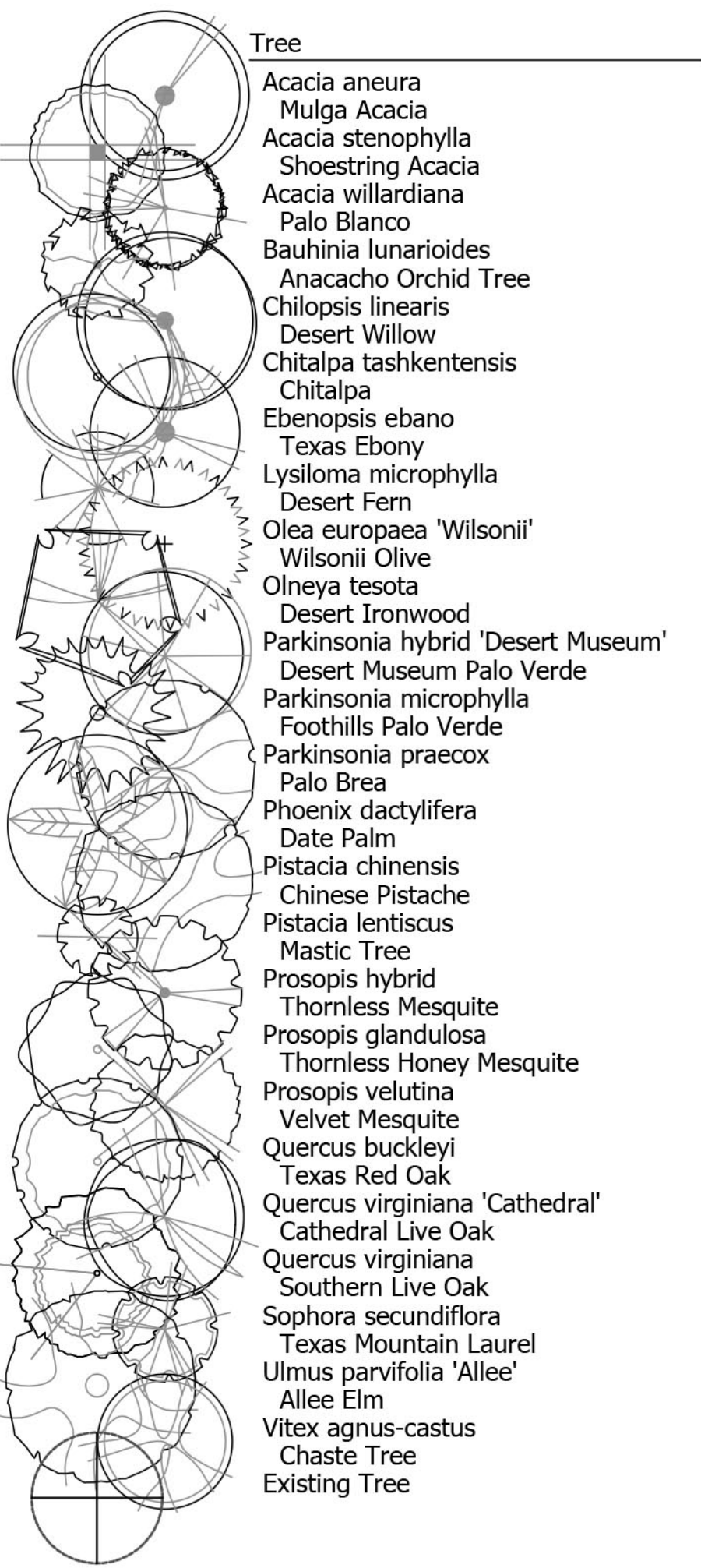
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215-07-400

APN:
215-07-006B

APN:
215-08-693

APN:
215-07-002C

PLANT MATERIALS LEGEND



Extra Large Shrubs

- Buddleia marrubifolia
- Woolly Butterfly Bush
- Caesalpinia gilliesii
- Yellow Bird of Paradise
- Caesalpinia mexicana
- Mexican Bird of Paradise
- Caesalpinia pulcherrima
- Red Bird of Paradise
- Cordia Boissieri
- Anacahuita
- Dodonaea viscosa
- Green Hopseed Bush
- Tecoma x 'Bells of Fire'
- Bells of Fire
- Tecoma Stans
- Yellow Bells
- Tecoma alata 'Orange Jubilee'
- Orange Jubilee
- Vauquelinia californica
- Arizona Rosewood

Large Shrubs

- Calliandra californica
- Red Fairy Duster
- Cassia artemisioides 'Silver'
- Silver Cassia
- Cassia nemophila
- Desert Cassia
- Larrea tridentata
- Creosote
- Leucophyllum frutescens 'Green Cloud'
- Green Cloud Sage
- Leucophyllum laevigatum
- Chihuahuan Sage
- Leucophyllum langmaniae 'Lynn's Legacy'
- Lynn's Legacy Sage
- Salvia clevelandii
- Chaparral Sage
- Simmondsia Chinensis
- Jojoba
- Viguiera deltoidea
- Goldeneye
- Leucophyllum langmaniae 'Rio Bravo'
- Rio Bravo Sage

Medium Shrubs

- Anisacanthus thurberi
- Desert Honeysuckle
- Dalea frutescens 'Sierra Negra'
- Sierra Negra Dalea
- Encelia farinosa
- Brittlebush
- Eremophila glabra spp. carnosia
- Winter Blaze
- Eremophila hygrophana Blue Bells
- Blue Bells
- Ericameria laricifolia
- Turpentine Bush
- Eremophila maculata 'Valentine'
- Valentine Bush
- Justicia candidans
- Red Justicia
- Lantana camara
- Bush Lantana
- Leucophyllum candidum 'Thunder Cloud'
- Thunder Cloud Sage
- Leucophyllum frutescens 'Compacta'
- Compact Texas Sage
- Leucophyllum x 'Heavenly Cloud'
- Heavenly Cloud Sage
- Leucophyllum zygophyllum
- Cimarron Sage

Medium Shrubs Continue

- Punica granatum
- Dwarf Pomegranate
- Rosmarinus officinalis
- Rosemary
- Rosmarinus officinalis 'Tuscan Blue'
- Tuscan Blue Rosemary
- Simmondsia Chinensis 'Vista'
- Compact Jojoba
- Teucrium fruticans
- Bush Germander

Small Shrubs

- Ambrosia deltoidea
- Triangle-Leaf Bursage
- Calliandra eriophylla
- Pink Fairy Duster
- Callistemon viminalis 'Little John'
- Little John Bottle Brush
- Myrtus communis 'compacta'
- Dwarf Myrtle
- Rhus ovata
- Sugar Bush
- Russelia equisetiformis
- Coral Fountain
- Salvia greggii
- Red Salvia
- Salvia leucantha
- Mexican Bush Sage

Vines

- Bougainvillea 'San Diego Red'
- Red Bougainvillea
- Rosa banksiae
- Lady Bank's Rose
- Trachelospermum Jasminoides
- Dwarf Star Jasmine

Cacti/ Accents

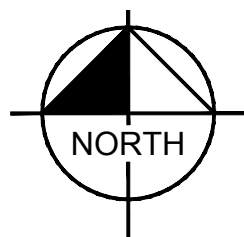
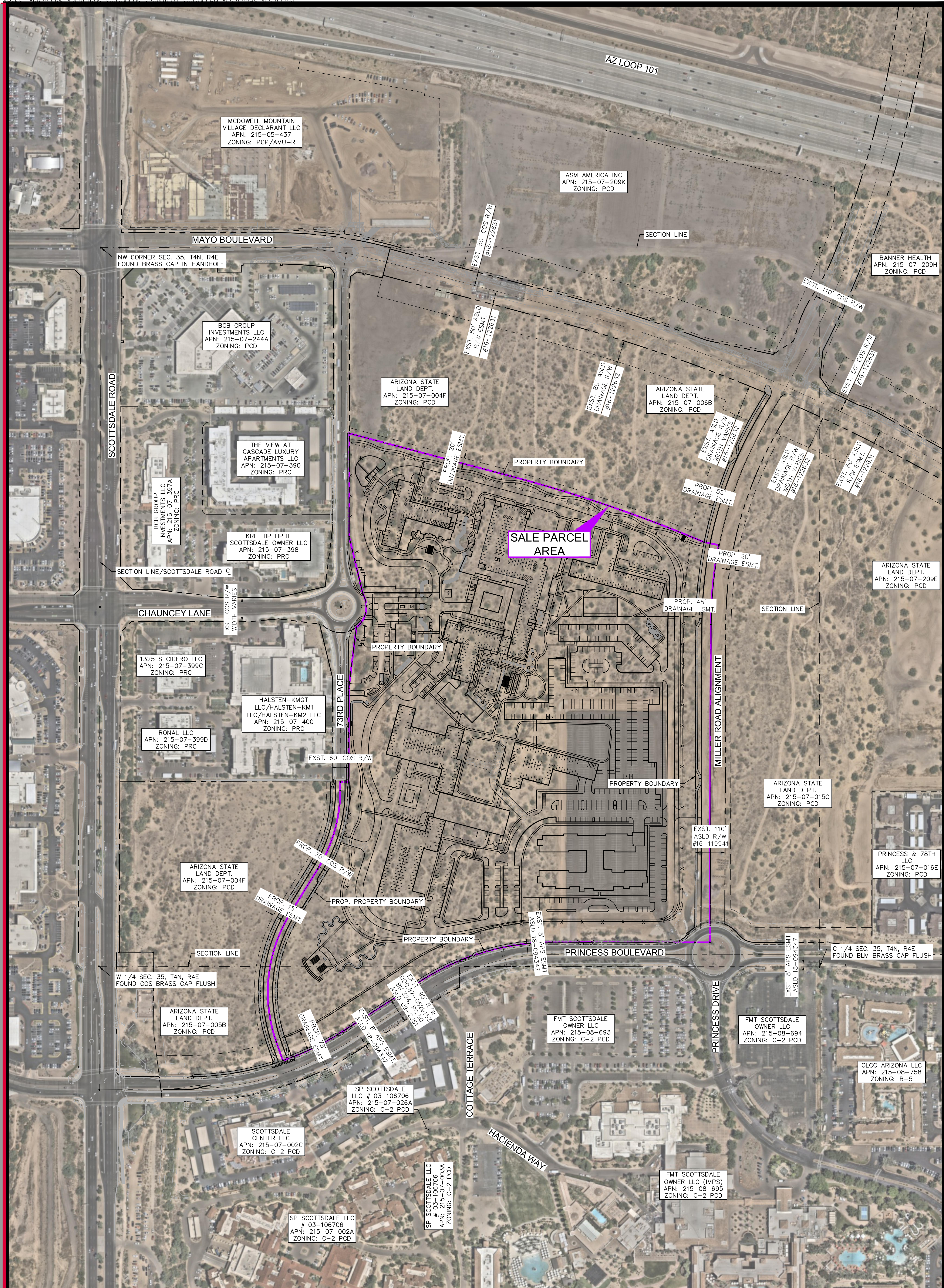
- Agave americana 'Marginata'
- Century Plant
- Agave bovicornuta
- Cow's Horn Agave
- Agave geminiflora
- Twin Flowered Agave
- Agave murpheyi
- Murphy's Agave
- Agave parryi 'truncata'
- Parry's Agave
- Agave victoriae-reginae
- Queen Victoria Agave
- Aloe barbadensis
- Medicinal Aloe
- Aloe hyb. 'Blue Elf'
- Blue Elf Aloe
- Asclepias subulata
- Desert Milkweed
- Bouteloua gracilis
- Blonde Ambition
- Dasyliion acrotrichum
- Green Desert Spoon
- Dasyliion longissimum
- Toothless Desert Spoon
- Euphorbia rigida
- Gopher Plant

Groundcovers

- Acacia redolens
- Prostrate Acacia
- Baccharis 'Centennial'
- Centennial Baccharis
- Chrysactinia mexicana
- Damianita
- Dalea capitata 'Sierra Gold'
- Sierra Gold Dalea
- Eremophila prostrata
- Outback Sunrise Eremophila
- Lantana montevidensis
- Purple Trailing Lantana
- Lantana montevidensis 'Alba'
- Trailing White Lantana
- Lantana sp.
- 'New Gold' Lantana
- Lantana sp.
- 'New Red' Lantana
- Oenothera berlandieri
- Mexican Evening Primrose
- Pyracantha koidzumii 'Red Elf'
- Dwarf Pyracantha
- Rosmarinus officinalis 'Prostratus'
- Trailing Rosemary
- Teucrium chamaedrys 'prostratum'
- Prostrate Germander
- Verbena gooddingii
- Gooding Verbena

- Hesperaloe funifera
- Giant Hesperaloe
- Hesperaloe sp. Pink Parade
- Pink Parade Hesperaloe
- Hesperaloe parviflora 'Brakelights'
- Brakelights Red Yucca
- Myoporum parvifolium
- Trailing Myoporum
- Muhlenbergia capillaris
- 'Regal Mist'
- Muhlenbergia lindheimeri
- 'Autumn Glow'
- Muhlenbergia rigens
- Deer Grass
- Nolina matapensis
- Bear Grass
- Opuntia basilaris
- Beavertail Prickly Pear
- Penstemon eatonii
- Firecracker Penstemon
- Penstemon parryi
- Parry's Penstemon
- Penstemon pseudospectabilis
- Canyon Penstemon
- Yucca pallida
- Pale Leaf Yucca
- Yucca rupicola
- Twisted Leaf Yucca

*MASTER CONCEPTUAL LANDSCAPE PLAN
IS A SCHEMATIC REPRESENTATION AND
SUBJECT TO CHANGE

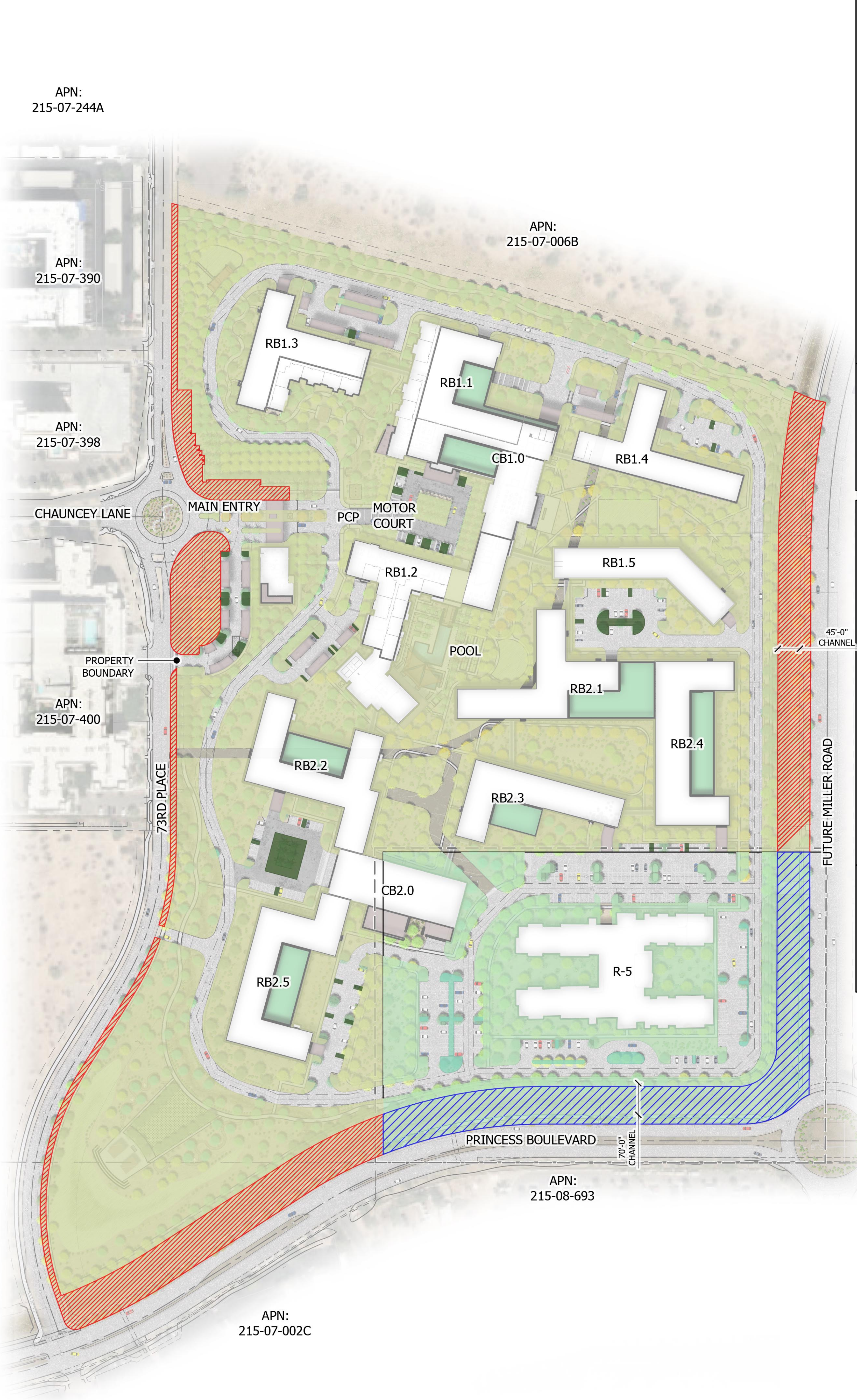


GRAPHIC SCALE IN FEET

0 75 150 300

A horizontal scale bar with four segments. The first segment (0 to 75) is white, the second (75 to 150) is black, the third (150 to 225) is white, and the fourth (225 to 300) is black. The numbers 0, 75, 150, and 300 are placed above the bar at their respective positions.ERICKSON SENIOR LIVING
CONTEXT AERIAL

Kimley»»Horn



SITE AREA - R-5	
NET	11.16 ac (486,130 S.F.)
REQUIRED OPEN SPACE	
R-5 ZONING	
MINIMUM = 0.24 x NET LOT AREA	
0.24 x 486,130 = 116,971 S.F.	
TOTAL REQUIRED OPEN SPACE	116,671 S.F.
PROVIDED OPEN SPACE:	±171,248 S.F.
REQUIRED FRONTAGE OPEN SPACE	
R-5 ZONING	
TOTAL REQUIRED FRONTAGE SPACE	58,336 S.F.
PROVIDED FRONTAGE OPEN SPACE	±98,116.6 S.F.
REQUIRED PARKING LOT LANDSCAPING	
PARKING AREAS & PARKING LOT LANDSCAPE NOT INCLUDED IN REQUIRED OPEN SPACE:	

LEGEND	
	COMMON OPEN SPACE
	FRONTAGE OPEN SPACE
	PARKING LOT LANDSCAPING

SITE AREA - PCP	
NET	43.12 ac (1,878,307 S.F.)
REQUIRED OPEN SPACE	
P-C ZONING	
MINIMUM = 0.25 x NET LOT AREA	
0.25 x 1,878,307 = 469,577 S.F.	
TOTAL REQUIRED OPEN SPACE	469,577 S.F.
PROVIDED OPEN SPACE:	±478,385 S.F.
REQUIRED FRONTAGE OPEN SPACE	
P-C ZONING	
TOTAL REQUIRED FRONTAGE SPACE	199,950 S.F.
PROVIDED FRONTAGE OPEN SPACE	±199,950 S.F.
REQUIRED PARKING LOT LANDSCAPING	
PARKING AREAS & PARKING LOT LANDSCAPE NOT INCLUDED IN REQUIRED OPEN SPACE:	

LEGEND	
	COMMON OPEN SPACE
	FRONTAGE OPEN SPACE
	PARKING LOT LANDSCAPING

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APN:
215-07-002C

PEDESTRIAN CIRCULATION LEGEND

SYMBOL	DESCRIPTION
	6' ROW CITY SIDEWALK
	8' ROW CITY SIDEWALK
	6' PUBLIC ACCESS TRAIL
	8' PRIMARY PEDESTRIAN ACCESS
	7' PRIMARY PEDESTRIAN ACCESS
	6' SECONDARY PEDESTRIAN ACCESS
	5' INTERNAL PEDESTRIAN ACCESS
	6' PEDESTRIAN CROSSWALK

