

MEMORANDUM

To: Bob Shelton
City Administrator, City of Frontenac

From: Larry Marks

Date: November 6, 2014

Re: Proposed Frontenac Square and The Grove in Frontenac

INTRODUCTION

The City of Frontenac is considering a proposal for a residential development to be located on approximately 11 acres along the north side of Clayton Road between the City Hall and Public Works complex to the east and Spoeede Road to the west. The proposed development is to include Frontenac Square, which will consist of 24 townhomes and 30 villas constructed on approximately 9 acres with access from Clayton Road. The balance of the development is comprised of an 86-bed assisted living facility, referred to as The Grove in Frontenac, which is to be constructed on approximately 2 acres with access from Spoeede Road.



The City of Frontenac has requested that Development Strategies address two specific issues with respect to the proposed development:

1. The appropriateness of the use and density of the proposed villas and townhomes of the Frontenac Square portion of the proposed development.
2. The adequacy of the parking proposed for Frontenac Square and The Grove in Frontenac assisted living facility.

KEY FINDINGS AND CONCLUSIONS

The following key findings and conclusions of this study are based on a review and analysis of the existing development on the property, neighboring development, residential projects in West County that are similar to the residential development being proposed, demographic trends and market attraction of Frontenac, existing housing stock in Frontenac, and a phone survey regarding the adequacy of existing parking of assisted living facilities in the region.

1. The existing school building is not viable for reuse and redevelopment for institutional uses given assumed acquisition and redevelopment costs.
2. Mixed use would be the highest and best reuse of the property but the community is seeking residential that is in accordance with the Comprehensive Plan
3. Developing the property for single family homes on one acre lots would require sale prices in excess of \$2 million, which would not be reasonable given the existing traffic, highway noise, and non-residential nature of much of the neighboring development.
4. The density and quality of proposed residential development is appropriate and consistent with similar residential developments in West County.
5. The proposed villas and townhomes will fill a need for housing products that are not currently available in Frontenac.

6. The parking, as proposed for the villas and townhomes, meets industry and local standards for this type of development.
7. The parking for the proposed assisted living facility is appropriate, assuming formal agreements are in place to handle additional parking demand for special events.

BACKGROUND

The Grove in Frontenac assisted living facility is to be constructed on the southeast corner of the I-64 and Spoeede Road interchange on two parcels containing one residence and a vacant lot.

The Frontenac Square portion of the proposed development is to be constructed on property that is currently owned by the Ladue School District. The property is comprised of four parcels which contain a total of approximately 9.6 acres. Located on the property is the vacant former Ladue early childhood center, a parking lot and a soccer field. The 33,727 square-foot early childhood center was constructed in 1936. The Ladue School District moved out of the building in June 2011 and the building has remained vacant and for sale since that time. It is highly unlikely that the existing building would be appropriate for reuse as an educational facility for a number of reasons:

1. Given the age and condition of the building it would be prohibitively expensive to renovate. This was an important determinant in the Ladue School District's decision to abandon the Frontenac facility and construct a new facility at 10890 Ladue Road in Creve Coeur. It is clear from observation of the building that it is not energy efficient. In addition, reuse of the building would require extensive abatement of environmental concerns, including asbestos and lead paint.
2. The Frontenac facility is also functionally obsolete for any use other than a preschool, given the unique fixture and furniture requirements for preschool children. The layout is also functionally outdated with regards to the needs of contemporary preschool facilities.
3. From the perspective of the Ladue School District, a preschool educational use is not the highest and best use possible for this strategic West County location near the

heavily travelled I-64 and Lindbergh Boulevard interchange. Similarly, it is not the highest and best use from an economic perspective for the City of Frontenac.

Should the Ladue School District wish to sell the property, the high acquisition cost would be coupled with expensive site development costs, making it unreasonable to assume that institutional uses could afford to redevelop the school property.

PLANNING OVERVIEW

As discussed in the September 2012 PGAV *Clayton & Spoede Land Use Analysis Memorandum*, the highest and best use for the Ladue School District property is for some form of commercial or mixed-use development, given the properties' strategic location in central West County near Plaza Frontenac and its proximity to the heavily-trafficked I-64 (over 145,000 ADT) and Lindbergh Boulevard (25,000 ADT) interchange, as well as a segment of Clayton Road with a weekday ADT of almost 15,000.

Since its closing in June 2011, the school district received an offer from the Sansone Group proposing a mixed-use development that would incorporate all of the property between Clayton Road, Spoede Road, I-64, and the City Hall and Public Works complex. Uses considered for the property included retail space, restaurants, office space, a lifetime fitness center and senior housing. However, in response to local opposition to the commercial nature of the project, the proposal was not submitted to the city.

According to the *2006 Comprehensive Plan* for the City of Frontenac, "Goal Statements" outlined with respect to Frontenac's "Residential Character" include:

1. Sustaining the variety of housing types in Frontenac to allow residents to remain in the community throughout their lifetime and across multiple stages of housing need (i.e., first home, family home, empty nest, retirement).
2. Supplementing housing types with high-end villas as needed to meet the needs of the community.

The "Land Use Plan" portion of the *2006 Comprehensive Plan* identified the need for a "Single Family Residential - Planned" designation, which was proposed as an overlay land use category. "The intention of this is to recognize that the demand for housing options in the area is dynamic and to allow a degree of flexibility for the City of Frontenac to this demand. This district identifies areas within Frontenac where the type of residential described below could easily fit into the fabric of the community."

Three specific locations are identified as potential Single-Family Residential – Planned (Overlay) districts:

1. An area bounded by Clayton Road on the south, Spoeede Road on the west, I-64 on the north, and City Hall and Public Works complex on the east, the location of the proposed Frontenac Square and Grove in Frontenac developments.
2. The St. Joseph's Academy property located along the west side of Lindbergh Boulevard, which is still actively used.
3. An area generally bounded by Arthur Place on the north, Dwyer Avenue on the east, Gold Dust Avenue on the south, and Princess Avenue on the west, which includes the Frontenac Racquet Club and the difficult to develop property on both sides of Deer Creek.

Of these three identified opportunities for a Single-Family Residential – Planned overlay, only the Clayton Road area is readily developable at this time.

FRONTENAC SQUARE ANALYSIS

Potential Residential Use and Density

The approximately 9-acre property proposed for the Frontenac Square villas and townhomes development is currently zoned for one-acre single family residential. The sale price of the school property is confidential. Based on a review of recent land sales in Frontenac of new single family residential construction and a discussion with representatives from the City of Frontenac, it is reasonable to assume that the per-acre sale price for the property would be at least \$400,000 or more. However, these sale prices refer to properties with adequate street and utility infrastructure that are relatively flat and easy to develop. In contrast, developing the Ladue school property for residential purposes will require demolition and abatement, extensive grading, significant utility improvements and new streets. It is reasonable to assume that development costs could be in the neighborhood of an additional \$500,000 per acre.

Typically, the cost of a residential lot that is ready for development represents approximately 20% to 30% of the sale price of a home. As indicated by the following table, a survey of newly constructed or under construction homes in Frontenac, indicates the percentage to be roughly 25%.

Single Family Lot Sales

<i>Address</i>	<i>New Home</i>				<i>Sale Date</i>	<i>Site % of Listing</i>
	<i>Asking Price</i>	<i>Lot Size</i>	<i>Lot Sale Price</i>	<i>per acre</i>		
18 Glen Abbey Dr	\$1,689,000	0.89	\$355,000	\$398,876	Sep-13	21.0%
3 Devondale Ln	\$1,748,900	1.00	\$435,000	\$435,000	Apr-14	24.9%
8 Chipper Rd	\$1,798,900	1.14	\$500,000	\$438,596	May-14	27.8%
13 Clayton Downs Ln	\$1,050,000	1.04	\$290,000	\$278,846	Jun-14	27.6%
4 Lynnbrook Rd	\$2,549,000	1.03	\$430,000	\$417,476	Dec-05	16.9%
11 Devondale Ln	\$1,899,000	1.00	\$382,000	\$382,000	Feb-02	20.1%
All Sales	\$1,789,133	1.02	\$398,667	\$391,799		23.0%
Recent Sales (2013-14)	\$1,571,700	1.02	\$395,000	\$387,830		25.3%

At roughly \$900,000 dollars an acre, it is unreasonable to assume that the homes in excess of \$2 million that would need to be built to absorb this land and development cost would be attractive, given the non-residential character of development to the east and the commercial character of the north side of Clayton Road. In addition, the noise from I-64 would serve as a deterrent to the construction of million dollar plus homes at this location.

Density Comparison

Pulte Homes has proposed a 54-unit residential development on a 9.05 acre site that is occupied by the vacant Ladue Early Childhood Center at 10601 Clayton Road in Frontenac. The proposed development would include 30 duplex villas and 24 two-story townhomes. The overall density of the proposed development is about six units per acre, which is significantly more dense than the single family home development that predominates in Frontenac. A survey of new home listings in the city indicates a typical lot size of about one acre.

To determine a reasonable density for a luxury villa or townhome development, several developments located in Chesterfield, Clayton and Richmond Heights were surveyed. These developments represent the top end of this style of development in St. Louis County, and each of the communities has above average incomes compared to the county as a whole. However, the median income of households in Frontenac remains about \$60,000 to \$70,000 above those of Chesterfield and Clayton.

The following table summarizes the density of the surveyed developments and compares them to the density for the proposed Frontenac Square development. Also included is the sale price of the most recently sold unit in each development. All of the properties are less than 30 years old and generally in very good to excellent condition.

Villa and Townhome Density and Price Comparison

Place	City	Type	Units	Acres	Units/acre	Acre/Unit	Recent Sale	
							Price	
Sedgwick Place	Richmond Heights	Villa	18	2.9	6.21	0.16	\$700,000	
Gascony	Chesterfield	Villa	10	3.2	3.13	0.32	\$709,000	
Picardy Hill	Chesterfield	Villa	89	20.4	4.36	0.23	\$430,000	
The Knolls	Chesterfield	Villa	37	9.8	3.78	0.26	\$649,000	
Brighton Way 1: Parkside	Clayton	Townhome	5	0.3	16.67	0.06	\$755,000	
Brighton Way 2: Nine Brighton Way	Clayton	Townhome	3	0.3	10.00	0.10	\$822,000	
Brighton Way 3: Brighton Way	Clayton	Townhome	4	0.3	13.33	0.08	\$749,000	
<i>Average</i>		<i>Villa</i>			<i>4.37</i>	<i>0.24</i>	<i>\$622,000</i>	
<i>Average</i>		<i>Townhome</i>			<i>13.33</i>	<i>0.08</i>	<i>\$775,333</i>	
<i>Average</i>		<i>Overall</i>			<i>8.21</i>	<i>0.17</i>	<i>\$687,714</i>	
Proposed Development		Villas	30	5.82	5.15	0.19		
Proposed Development		Townhomes	24	3.23	7.43	0.13		
Proposed Development		Overall	54	9.05	5.97	0.17		

The following provide a more detailed summary of each development surveyed.

1) Sedgwick Place

9001-35 Sedgwick Place Drive
 Richmond Heights, MO
 Year Built: 1986
 Most Recent Sale: Jan. 2013
 Sale Price: \$700,000 (\$161/SF)
 Price Range: \$300,000 - \$700,000
 Total Units: 18
 Site Size: 2.9 acres
 Units per acre: 6.21



2) Gascony

14401-33 Rue de Gascony Court
Chesterfield, MO
Year Built: 2007
Most Recent Sale: Aug. 2013
Sale Price: \$709,000 (\$290/SF)
Price Range: \$585,000 - \$709,000
Total Units: 10
Site Size: 3.2 acres
Units per acre: 3.13



3) Picardy Hill

Picardy Hill Drive
Chesterfield, MO
Year Built: 1997
Most Recent Sale: July 2014
Sale Price: \$430,000 (\$145/SF)
Price Range: \$390,000 - \$540,000
Total Units: 89
Site Size: 20.4 acres
Units per acre: 4.36



4) The Knolls

700-830 Stonebluff Court
Chesterfield, MO
Year Built: 2000
Most Recent Sale: Aug. 2014
Sale Price: \$649,000 (\$238/SF)
Price Range: \$600,000 - \$1,000,000
Total Units: 37
Site Size: 9.8 acres
Units per acre: 3.78



5) Brighton Way/Parkside Drive

1 Brighton Way and
8223-35 Parkside Drive
Clayton, MO
Year Built: 1997
Most Recent Sale: March 2011
Sale Price: \$755,000 (\$260/SF)
Price Range: \$750,000 - \$900,000
Total Units: 5
Site Size: 0.3 acres
Units per acre: 16.67



7) Nine Brighton Way

5-9 Brighton Way
Clayton, MO
Year Built: 2000
Most Recent Sale: June 2012
Sale Price: \$822,000 (\$276/SF)
Price Range: \$800,000 - \$850,000
Total Units: 3
Site Size: 0.3 acres
Units per acre: 10



6) Brighton Way

14-20 Brighton Way
Clayton, MO
Year Built: 1997
Most Recent Sale: Jan 2014
Sale Price: \$749,000 (\$265/SF)
Price Range: \$725,000 - \$750,000
Total Units: 4
Site Size: 0.3 acres
Units per acre: 13.33



The proposed density of the Frontenac villas is slightly higher than average compared to the surveyed developments (5.15 units/acre vs. 4.37 units per acre). On the other hand, the townhome density is significantly lower than average (7.43 units/acre vs. 13.33 units per acre). The density of the proposed development is very close to Sedwick Place in Richmond Heights. *Overall, the proposed density of the development is consistent with those in other high income communities in St. Louis County.*

Quality/Pricing

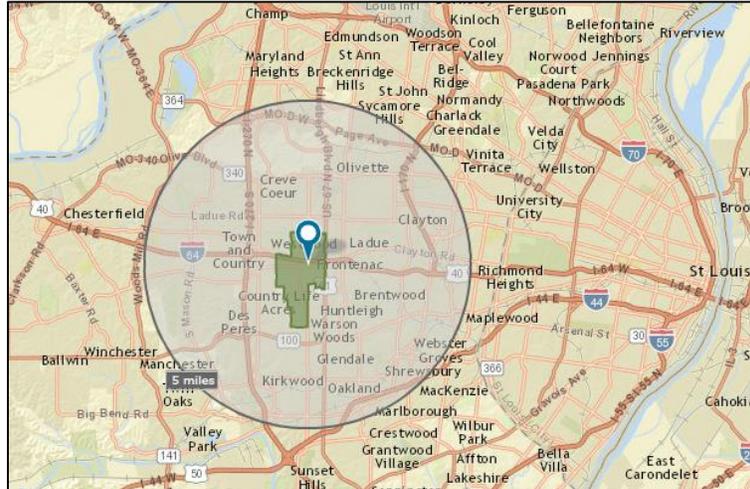
The quality of villa and townhome development in Frontenac should be consistent with the high quality and value of existing single family homes within Frontenac. We compared the value of townhome development to proposed new single family homes in Clayton as a rough estimate of consistency between different types of residential development. The three planned new construction homes in Clayton have an average asking price of about \$1.9 million. Planned new construction in Frontenac includes six homes with an average asking price of about \$1.8 million. The main difference between the two are lot size: one acre single family home lots in Frontenac and quarter acre lots for new homes in Clayton. The home sizes are roughly comparable, with the exception of one very large home in Frontenac.

Thus, we would expect the proposed townhomes and villas in Frontenac to be priced similarly to those in Clayton. The Clayton townhomes range in price from about \$700,000 to \$900,000 with a price per square foot of \$260 to \$276 per square foot (of living area, excluding garages and basements). The proposed villas and townhomes in Frontenac Square will be about 1,000 square feet smaller than the most expensive units surveyed. The prices will also be lower with base townhome units starting at about \$500,000 to \$550,000 and base villas starting about \$500,000 to \$670,000. However, the price per square foot will be very similar to the townhome units in Clayton at about \$270 per square foot. The most expensive cost per square foot of the surveyed villas was in the Gascony development in Chesterfield. The unit sold for \$700,000, or \$290 per square foot. *In conclusion, the proposed units in Frontenac Square will be smaller than those surveyed, but on a price per square foot basis, they are very similar to the most expensive units in Clayton and Chesterfield.*

Demographic Trends / Market Attraction

Demographic overview

Frontenac, population 3,463, is located within an area of central St. Louis County that is characterized by high household income and high median housing values. The development site is situated close to the geographical center of a number of high income municipalities.



Area of study: Frontenac (green) and five-mile radius encompassing neighboring municipalities (gray).

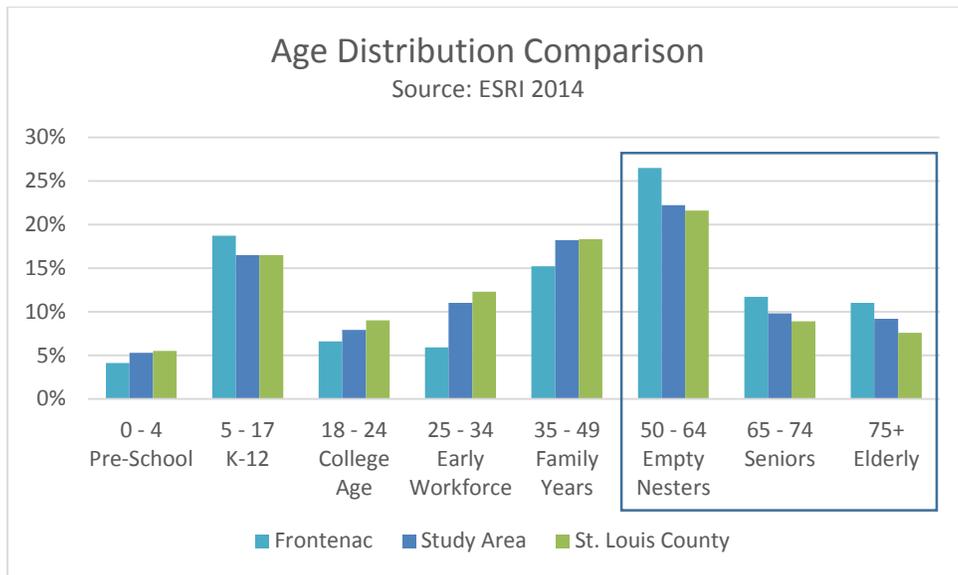
Like most of St. Louis County,

Frontenac has plateaued in terms of population growth, with a population that will remain largely stable over the next five years. The five mile radius around the development site (the study area) is home to 184,853 people in over a dozen municipalities. Since 2010, the population of the city and the study area have remained largely unchanged, decreasing by one percent in Frontenac and increasing by less than one percent in the study area. In the absence of any major development, the population of Frontenac is expected to decrease by a handful of residents over the next five years, while the PMA will grow by one percent, adding approximately 1,000 residents. Despite this overall population stability, the composition of the population within these two geographies is expected to change as a result of demographic trends, leading to shifting consumer preference.

The two types of housing proposed for Frontenac Square are designed to appeal to different types of consumers. Villas ranging in size from nearly 1,900 square feet to 2,500 square feet will be designed to appeal to upscale empty nesters looking to downsize from a larger home to a smaller home with less required maintenance but still remain in or near their community. Townhomes ranging in size from approximately 1,900 to 2,000 square feet will be designed to appeal to younger, upwardly mobile professionals, many of whom will be first time homebuyers and new residents of Frontenac. Demographic trends for the specific markets for each type of development are discussed below.

Villas

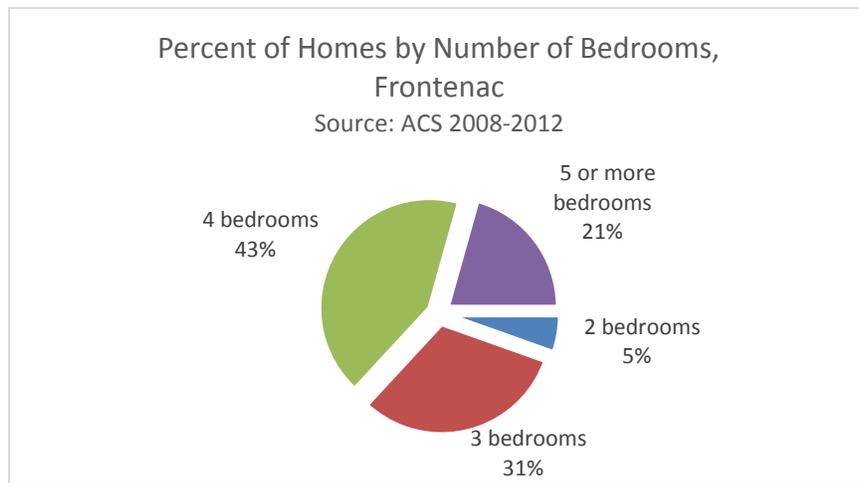
Villas are a housing type for upscale empty nesters who are looking to move from a larger home to a smaller home with less intensive maintenance needs. These homeowners tend to be married with adult children, meaning that they are typically in their 50s or older. Comparing the age distribution in Frontenac, the study area, and in St. Louis County shows that Frontenac has a higher proportion of residents ages 50 or older. In fact, nearly half (49 percent) of Frontenac residents are age 50 or older, compared to 41 percent in the study area and 38 percent in St. Louis County.



Of Frontenac’s population of residents 50 and older, who number about 1,700, approximately half are between the ages of 50 and 65 (27 percent of the total population of the municipality), and about half are 65 and older (22 percent of the total population). Over the course of the next five years, the percentage of residents ages 50 and older is expected to remain largely unchanged. In 2019, it is projected that 1,719 Frontenac residents will be age 50 or older.

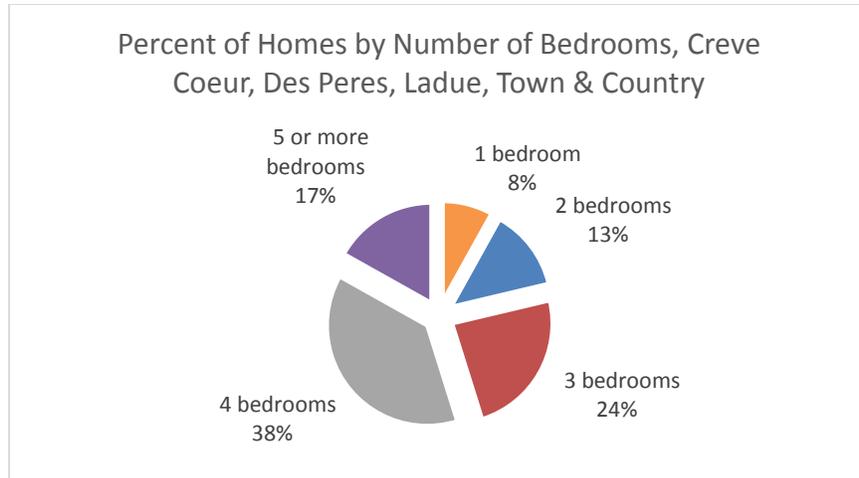
Compared to Frontenac, the overall proportion of study area residents 50 and older is smaller, but in absolute numbers, there are 76,061 residents ages 50 and older. Over the next five years, this number is expected to increase by about 2,500 people, for a total of 78,403 residents ages 50 or older within five miles of the development site by 2019.

A 2012 article in the Wall Street Journal detailed how many members of the Baby Boomer generation are choosing to move to smaller homes once their children have left home.¹ The same article refers to research that found that nearly 60 percent of Americans over the age of 50 who change residence move to a new home within 20 miles of their origin. Data about housing size in Frontenac indicates that there are not many homes available for older homeowners who wish to downsize to a smaller house in Frontenac. For example, two-bedroom homes only make up five percent of Frontenac's housing stock, while there are no one-bedroom homes. Three-bedroom homes make up nearly one third of the housing stock (31 percent), and larger homes with four or more bedrooms make up 64 percent of the housing stock.

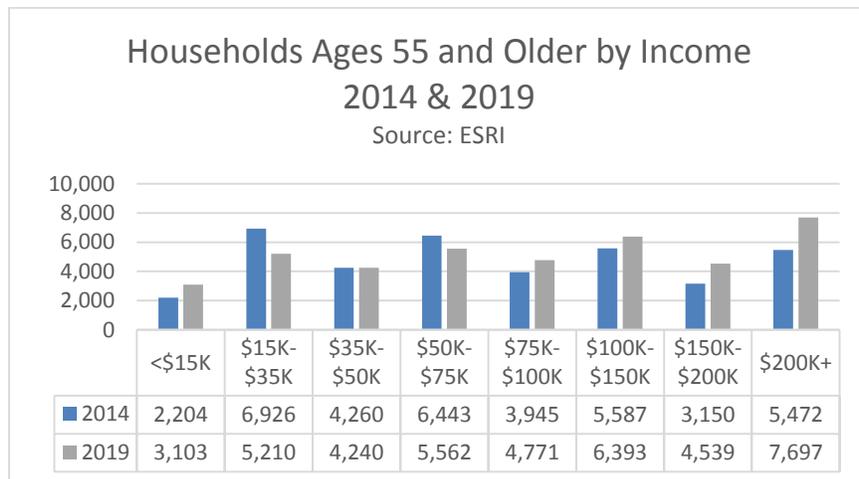


The four municipalities adjacent to Frontenac (Creve Coeur, Des Peres, Ladue, and Town and Country) offer a more balanced range of housing options. Homes with four or more bedrooms still make up the majority (55 percent), but there are more homes in the one to three bedroom range.

¹ <http://online.wsj.com/articles/SB10001424052970204005004578080561639348492>



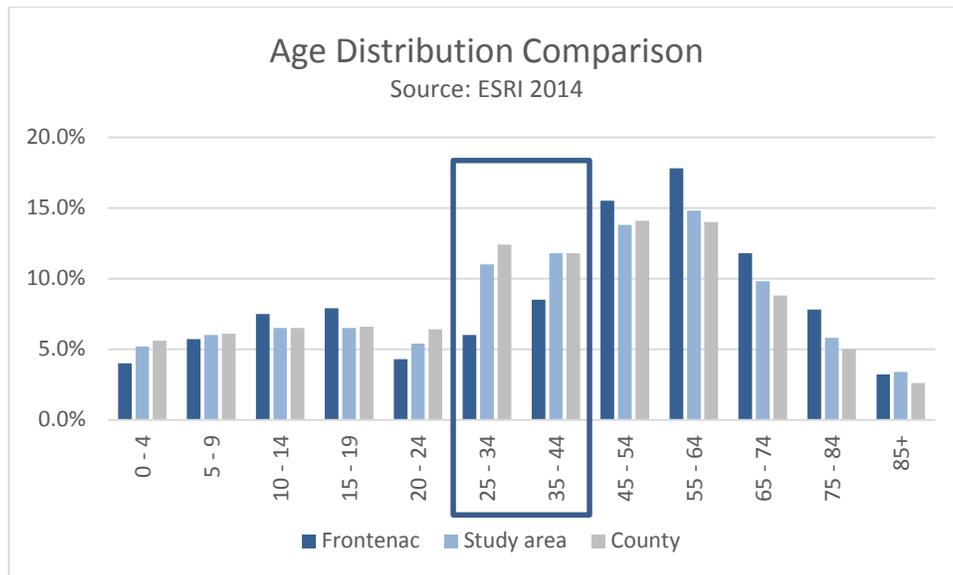
Data about incomes in empty nester households shows that Frontenac and the neighboring communities are home to a large number of high income households. The table below shows the income profile for households where the head of household is 55 or older for the five mile radius study area. Over one third of these households (36 percent) have an annual income of \$100,000 or more. It is predicted that the median household income of residents 55 and older will grow by over five percent in both areas over the next five years and by 2019, 45 percent of older households will have an annual income of \$100,000 or more.



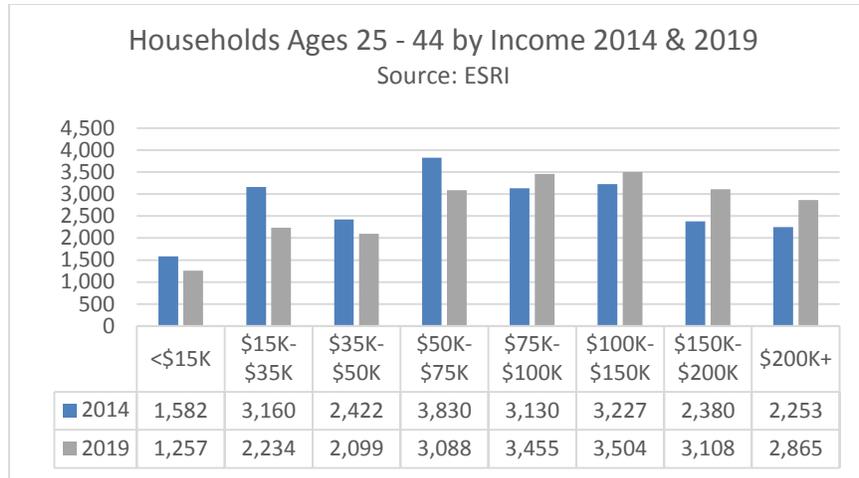
In summary, the areas surrounding Frontenac are home to approximately 76,000 residents ages 50 or older (about 1,700 of whom live within Frontenac), and this number is expected to grow by 2,500 over the next five years as the Baby Boomer generation ages. An analysis of household income shows a high percentage of high-income older households. Though Frontenac and the surrounding areas are home to a large number of large and high value homes, options are limited for residents of Frontenac and the surrounding areas who wish to move to a smaller home but live in Frontenac.

Townhomes

Townhomes are designed to appeal to high-income, professional young adults, the majority of whom are college educated and married, either without children or with young children. A look at the overall age distribution in Frontenac compared to the study area and the county shows that Frontenac is home to a much smaller proportion of adults ages 25 to 44 (15 percent), the target demographic for townhomes, than the study area and the county (23 and 24 percent, respectively). Therefore, adults ages 25 to 44 are living in the communities around Frontenac, but far fewer are residing within the city of Frontenac.

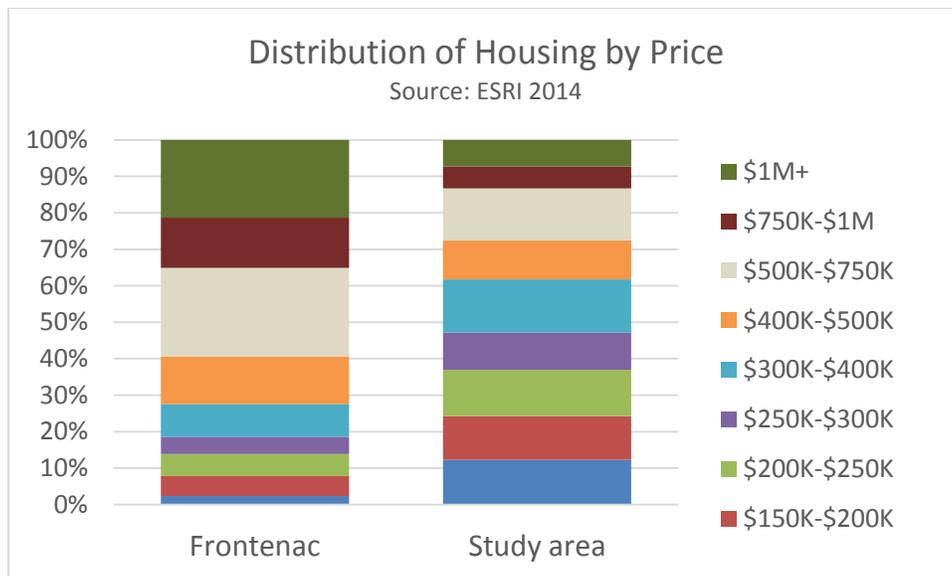


Looking specifically at the income levels of this demographic reveals a number of high income young professionals living within five miles of the development site. Households earning over \$50,000 annually make up 67 percent in this age group and households earning over \$100,000 annually make up 36 percent of this age group. Very high income households, earning over \$150,000 annually, account for more than two in ten of the households in this age group (21 percent). Overall, the communities within five miles of the development site are currently home to 7,860 households ages 25 to 44 that earn more than \$100,000 per year, only 117 of whom are currently living in Frontenac. Looking at projections for 2019, the number of households ages 25 to 44 earning \$100,000 or more per year will increase to 9,477 (increasing from 36 to 44 percent of this age group's households); however, the number of these residents living in Frontenac will only increase by about 40, for a total of 161 households in 2019.

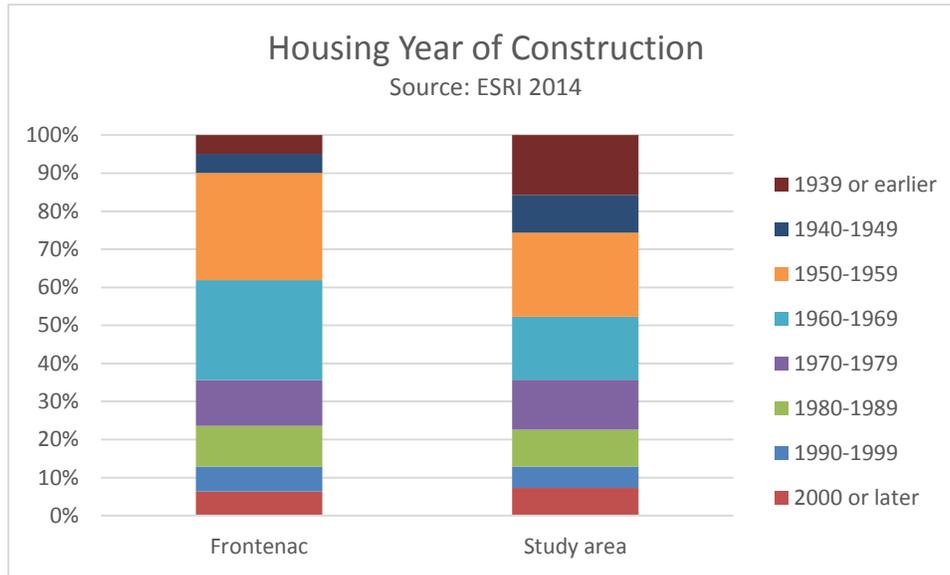


A look at the age distribution of Frontenac compared to the surrounding areas shows that there are relatively few young adults who live in Frontenac. While Frontenac had only 157 owner occupied housing units owned by a person age 25 to 44, there were 13,745 such households in the wider study area. The number of high income young professionals is expected to grow in the study area, indicating that there is a strong market for housing products designed to appeal to younger homeowners.

As seen in the chart below, 24 percent of Frontenac homes have a value between \$500,000 and \$750,000 and 13 percent have a value between \$400,000 and \$500,000. By diversifying the number of housing units at the lower end of the \$500,000 to \$750,000 range, Frontenac could attract young professional residents who are interested in living in Frontenac, but who are currently limited to locations in West County outside of Frontenac.



Overall age of housing



One note about housing that applies to both demographic groups is that housing in both Frontenac and the study area developed very rapidly along with the growth of St. Louis County in the mid-20th century. Given that growth generally slowed as county municipalities reached build-out, the renewal of housing stock moving forward will take place in the form of redevelopment rather than greenfield development. The chart below shows the relative age of housing in Frontenac and the study area. In Frontenac, over half of the housing units were built between 1950 and 1969, and over three fourths of housing in both the study area and Frontenac was built before 1980, meaning that the majority of housing in this part of St. Louis County is 35 years old or older. Only six percent of housing in Frontenac has been built since 2000. Strategies to increase the supply of new housing will help municipalities to meet residential demand for diverse housing products as well as mitigate against the effects of a large proportion of existing stock reaching obsolescence simultaneously.

Parking Adequacy

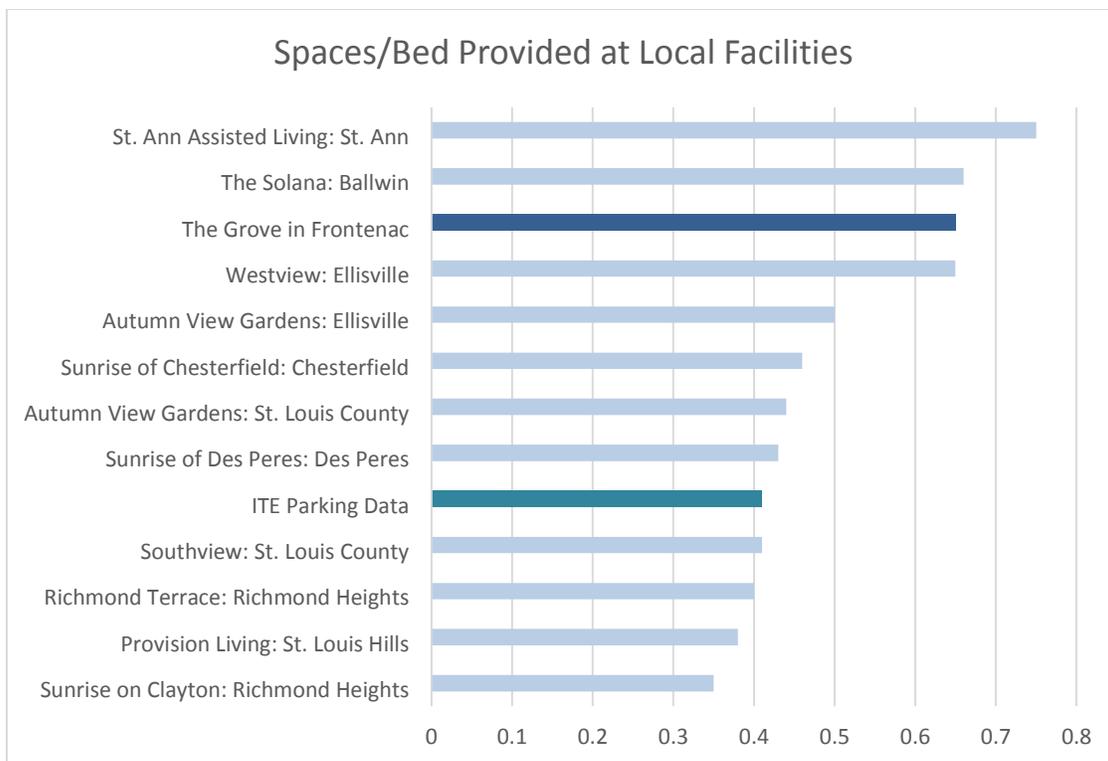
Based on a review of the site plan provided by the developer, adequate parking is available for both villas and townhomes. All units have a two-car garage, which is equal to the Frontenac parking requirements for an “R-2” District. In addition, the driveways to the garages could accommodate additional resident or visitor parking. Finally the proposed width of the streets can accommodate on-street visitor parking in front of many villas, along the approach to the cul-de-sac, and along the east-west legs of the townhomes drive. Assuming parking on only one side of these legs, twelve visitor parking spaces are possible, which would represent an additional .5 spaces per townhouse unit.

THE GROVE IN FRONTENAC PARKING ANALYSIS

Summary

Development Strategies undertook an analysis to understand the parking requirements of assisted living facilities in the St. Louis metropolitan area to determine the adequacy of the proposed level of parking for The Grove in Frontenac. Three research activities were undertaken: (1) a review of industry data about the provision of parking at assisted living facilities, (2) the collection of quantitative data about the amount of parking provided at operating facilities, and (3) the collection of qualitative data from assisted living management about whether the number of spaces is adequate for daily and special-event operations.

Data from facilities operating in the St. Louis area ranged from a low of 0.35 spaces per bed to a high of 0.75 spaces per bed, with the majority of properties grouped in the 0.40 to 0.50 space per bed range. The Grove in Frontenac proposes 57 parking spaces to serve the visitors, guests, and employees of an 88-bed facility, for a total of 0.65 spaces per bed. As seen in the chart below, this level of parking exceeds the parking provided at many area facilities, as well as average peak parking demand as recorded by the Institute of Transportation Engineers. Parking at area facilities was generally described as adequate for day-to-day use, but could be inadequate during some holidays and special events. However, each facility developed strategies to handle excess parking demand on these days.



Background

Assisted living facilities occupy a middle place on the continuum between independent living and nursing home facilities. Residents of assisted living typically live in private units but have access to 24-hour staffing, personal and health services, opportunities for socialization, and transportation. Because assisted living facilities provide residents with aid in accomplishing activities of daily living such as bathing, preparing food, and housework, most residents, if not all, are unable to operate motor vehicles and have no need to store a car on site. The provision of parking at these facilities is typically for the benefit of visitors, guests, employees, and deliveries, rather than for the personal use of residents.

Review of industry standards

The Institute of Transportation Engineers provides empirical data about peak parking demand using data submitted by volunteer observers from different locations in the United States. The 4th Edition of Parking Generation, released in 2010, contained data from 33 assisted living facilities with an average size of 82 units. The survey found average peak parking demand that ranged from 0.22 to 0.76 vehicles per dwelling unit between 9:00 a.m. and 3:00 p.m., with an average of 0.41 units per dwelling unit. As detailed below, this average is consistent with the amount of parking provided at a majority of St. Louis area assisted living facilities.

Review of parking provided at local facilities

Property staff and managers were contacted by phone to ask about the number of parking spaces and whether or not the number was sufficient for daily and event needs. As seen in the table below, the number of provided parking spaces varies by facility. The lowest number of parking spaces per bed is offered at Sunrise on Clayton; however, this site is also positioned adjacent to a street that offers approximately 29 additional public spaces. On-street parking is also available near Provision Living and Richmond Terrace, potentially mitigating the need for on-site parking. The greatest number of spaces are provided by St. Ann Assisted Living, at 0.75 spaces per bed.

In some cases, the number of provided parking spaces varies within the same municipality, such as in the case of Richmond Heights (Sunrise on Clayton and Richmond Terrace), where one facility (Sunrise on Clayton) provides 0.35 spaces per bed and the other (Richmond Terrace) provides 0.40 spaces per bed. In unincorporated St. Louis County, Southview in Affton provides 0.41 spaces per bed, while Autumn View in a different part of unincorporated St. Louis County near Maryland Heights provides 0.44 spaces per unit. In Ellisville, Autumn View Gardens provides 0.5, while Westview provides 0.65. Overall, the majority of facilities provide between 0.4 and 0.5 parking spaces per bed. It is clear that there is no universal rubric used to determine the necessary amount of parking for a certain number of beds. Contextual factors, such as those discussed in the section below, can also greatly influence whether parking is adequate or not.

Facility	Location	# of units or beds	# of parking spaces	Spaces/bed or unit	Adequacy of parking
Sunrise on Clayton	Richmond Heights	82 beds	29	0.35	No comment. Map shows approximately 30 on-street spaces in front of building, and an office building with approximately 270 spaces immediately to the west, both of which could potentially accommodate additional parking needs on holidays and weekends.
Provision Living St Louis Hills	City of St Louis	105 beds	40	0.38	There are "at least" 40 spaces, although developers should "go high" when planning parking because there is "never enough parking at assisted living." Have purchased a second lot in their time at the building.
Richmond Terrace Senior Living	Richmond Heights	99 beds	40	0.40	About 40 spaces, which is "plenty sufficient" for their needs. Not always sufficient for holidays, though people have parked at nearby shopping center and in on-street spaces.
South-view Assisted Living & Memory Care	Affton (Unincorporated St. Louis County)	116 beds	48	0.41	No comment.
Sunrise of Des Peres	Des Peres	102 beds	44	0.43	No comment. Plumbing store to the north has approximately 80 spaces, and Sam's Club across street has at least 500 spaces, both of which might informally potentially provide overflow parking.
Autumn View Gardens	Unincorporated St. Louis County	90 units	40	0.44	Adequate except for when there are events. If all staff drove, there probably wouldn't be enough parking, but since they are on a bus line, and some people take the bus, it's enough.
Sunrise of Chester-field	Chester-field	95 beds	44	0.46	No comment. Vision center/ medical facility across the street has 125 spaces that might be used for overflow parking if necessary.
Autumn View Gardens	Ellisville	84 units	42	0.5	No comment. Located next to a closed "Family Fun" center that might provide overflow parking on holidays.
Westview Assisted Living	Ellisville	80 units	52	0.65	No comment.
The Solana West County	Ballwin	98 beds	65	0.66	There are 65 spaces for guests and staff, which is "almost adequate" for day to day operations, though they "could have 15 more." On Monday and Friday, there are heavier parking needs. Monday is from 3 rd party providers and Friday is from family visits. On big event days like Thanksgiving, staff usually park along the curb to the rear of the site so that more parking spaces are available up front.
Saint Ann Assisted Living	St Ann	40 beds	30	0.75	There is "plenty of parking."

Adequacy of provided parking

Staff and managers were asked whether the amount of parking provided on site was sufficient for day-to-day operations as well as for holidays and other special events. Of the companies who were willing to talk about the adequacy of their parking, the majority reported that parking was adequate for day-to-day operations, although one respondent from the Solana said that their parking was “almost adequate” and that they “could have 15 more” spaces to meet daily needs, which would bring their optimum number of space to 0.82 per bed. Provision Living, with 0.38 spaces per bed, reported that the facility had to purchase a second lot to handle parking and that they would advise developers to “go high” when estimating the amount of necessary parking. Richmond Terrace, with 0.40 spaces per bed, considers their parking “plenty sufficient” for daily operations, and Autumn View Gardens in St. Louis County, with 0.44 spaces per apartment, also reported sufficient parking. The contact credited their location on a bus line, speculating that if every employee drove, parking would not be sufficient.

Nearly all surveyed staff reported inadequate parking for events and for holidays. However, the presence of street parking, a location for employees to park temporarily, or a large nearby lot not owned by the facility were cited as methods of handling overflow parking on these days. A scan of the placement of assisted care facilities reveals a number of nearby uses with parking lots that visitors could easily use on Sundays and holidays without disrupting business operations, such as a plumbing showroom, a vision care center, an office building, a bank building, and a car dealership. Though it is unlikely that formal shared-parking agreements exist between assisted living facilities and nearby large-parcel developments, the site of some facilities does create opportunities to explore this option as a potential parking-management strategy.

Conclusion

A review of industry standards, local cases, and qualitative data reveals a wide range of approaches for determining the amount of parking needed to serve assisted living facilities. A review of local facilities showed a distribution of between 0.35 and 0.75 spaces per bed. Data collected through phone interviews indicated that parking was generally adequate for daily needs but deficient during major events or holidays. However, the presence of on-street public parking or large, privately owned lots mitigated the impact of the lack of on-site parking. The Grove in Frontenac, as proposed, would not have any on-street parking available, so it would need to have arrangements for nearby parking, perhaps using their shuttle or arranging with nearby lot owners to accommodate special events.