

**VILLAGE OF BARTLETT**

**COMMITTEE AGENDA**

**OCTOBER 5, 2021**

**BUILDING & ZONING, CHAIRMAN HOPKINS**

Clover Communities Concept Plan

**FINANCE & GOLF, CHAIRMAN DEYNE**

Proposed 2021 Property Tax Levy



**PLANNING AND DEVELOPMENT SERVICES MEMORANDUM**  
**21-96**

DATE: September 21, 2021  
TO: Paula Schumacher, Village Administrator  
FROM: Roberta Grill, Planning & Development Services Director   
RE: **(CP #21-01) Clover Communities Concept Plan**

---

**PETITIONER**

Clover Group Inc.

**SUBJECT SITE**

West side of Route 59 approximately 0.1 mile north of Army Trail Road and 0.08 miles south of Schick Road.

**REQUEST**

***Concept Plan Review (A conceptual review of a proposed development project in which the Petitioner requests input and direction from the Village Board Committee prior to their full submittal of an application.)***

**SURROUNDING LAND USES**

	<u>Land Use</u>	<u>Comprehensive Plan</u>	<u>Zoning</u>
<b>Subject Site</b>	<b>Vacant</b>	<b>Commercial</b>	<b>B-3 PUD</b>
North	Commercial	Commercial	PD
South	SF Home/Church	Munic./Instit./Estate Res.	R-1*
East	Residential	Estate Residential	ER-3 PUD
West	Residential	Suburban Residential	SR-2 PUD

\*Unincorporated DuPage County Single Family Residence District

**DISCUSSION**

1. The petitioner is requesting a concept plan review for a 119-unit market-rate senior, independent-living development on a 10.05-acre property located on the west side of Route 59, directly south of the 7-11 at the corner of Route 59 and Schick Road. The property is zoned B-3 PUD (Neighborhood Shopping

- District). The building would contain four (4) 1-bedroom units and 115 2-bedroom units.
2. The proposed three-story building would consist of a combination of brick and siding on all building elevations with each unit having a patio or balcony.
  3. The site plan identifies 75 surface parking spaces, including six (6) handicapped accessible spaces and 40 spaces located within garages for a total of 121 spaces. This exceeds the Zoning Ordinance requirement of 40 spaces (1 space for every 3 senior dwelling units).
  4. The development proposal identifies a new right-in/right-out along Route 59 (which would require IDOT approval), a connection to the private drive to the north through the Illini Partners Subdivision, where the medical building and 7-11 are located and depicts a potential future cross access to the property to the south, as requested by Staff.
  5. If the petitioner chooses to move forward with a formal application, they would be requesting an amendment to the PUD, site/PUD plan approval, an amendment to the Future Land Use Plan, and special use permits to allow a building height over 25' and to allow senior housing at this location.
  6. Stormwater detention requirements would be determined at the time of a formal application submittal.
  7. The petitioner has submitted an impact analysis for the proposed use change from commercial to multi-family senior housing.

### **RECOMMENDATION**

1. If the Village Board Committee gives a favorable review of this concept plan, the petitioner could proceed with a full development application submittal.
2. A copy of the concept plan and additional background information are attached for your review.



# Location Map

CP 21-01 Clover Communities  
Concept Plan  
PIN: 01-16-400-013







# VILLAGE OF BARTLETT CONCEPT PLAN APPLICATION

(Please type or complete in blue or black ink.)

**For Office Use Only**

Case # - CP 21-01 -

RECEIVED

MAY 29 2021

PLANNING & DEVELOPMENT  
VILLAGE OF  
BARTLETT

**PROJECT NAME** Clover Commuities Bartlett LLC

**PETITIONER INFORMATION (PRIMARY CONTACT)**

**Name:** Michael Joseph

**Street Address:** 348 Harris Hill Road

**City, State:** Williamsville, NY

**Zip Code:** 14221

**Email Address:** bernat@clovergroupinc.com

**Phone Number:** 734-346-0246

**Preferred Method to be contacted:** Email

**PROPERTY OWNER INFORMATION**

**Name:** Bartlett Equities LLC

**Street Address:** 664 N Milwaukee, Suite 200

**City, State:** Prospect Heights, IL

**Zip Code:** 60070

**Phone Number:** 847-520-4200

**OWNER'S SIGNATURE:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
*(OWNER'S SIGNATURE IS REQUIRED or A LETTER AUTHORIZING THE PETITION SUBMITTAL.)*

**PROPERTY INFORMATION**

**Common Address/General Location of Property:** West side IL Rt 59 north of Army Trail S of S

**Property Index Number ("Tax PIN"/"Parcel ID"):** 01-16-400-013-0000

**Acreeage:** 10.16 **No. of Lots/Units:** 1

**Zoning:** Existing: B-2 PUD  **Land Use:** Existing: Vacant   
(Refer to Official Zoning Map)  
Proposed: B-2 PUD  Proposed: Residential

**Comprehensive Plan Designation for this Property:** Commercial   
(Refer to Future Land Use Map)

**APPLICANT'S EXPERTS** (If applicable, including name, address, phone and email)

**Attorney**

Teia Bui

---

348 Harris Hill Road, Williamsville, NY 14221

---

tbui@clovergroupinc.com 716-688-7460

---

**Engineer**

---

---

---

**Other**

---

---

---

**ACKNOWLEDGEMENT**

I understand that by signing this form, that the property in question may be visited by village staff and Board/Commission members throughout the petition process and that the petitioner listed above will be the primary contact for all correspondence issued by the village.

I certify that the information and exhibits submitted are true and correct to the best of my knowledge and that I am to file this application and act on behalf of the above signatures.

Any late, incomplete or non-conforming application submittal will not be processed until ALL materials and fees have been submitted.

SIGNATURE OF PETITIONER: \_\_\_\_\_  
*[Handwritten signature]*

PRINT NAME: MICHAEL L. Joseph

DATE: 5-20-2021

**REIMBURSEMENT OF CONSULTANT FEES AGREEMENT**

The undersigned hereby acknowledges his/her obligation to reimburse the Village of Bartlett for all necessary and reasonable expenses incurred by the Village for review and processing of the application. Further, the undersigned acknowledges that he/she understands that these expenses will be billed on an ongoing basis as they are incurred and will be due within thirty days. All reviews of the petition will be discontinued if the expenses have not been paid within that period. Such expenses may include, but are not limited to: attorney's fees, engineer fees, public advertising expenses, and recording fees. Please complete the information below and sign.

NAME OF PERSON TO BE BILLED: Claver Construction Mgmt West

ADDRESS: 348 Harris Hill Rd.  
Williamsville, NY 14221

PHONE NUMBER: 716. 688. 8640

EMAIL: ssimonick@clavergroupinc.com

SIGNATURE: *[Handwritten signature]*

DATE: 5-20-2021





September 27, 2021

Village of Bartlett, Community Development  
228 S. Main Street  
Bartlett, IL 60103

VIA Email

**RE: Concept Plan Review Application – PIN 01-16-400-013-0000, West side of Rt 59, North of Army Trail and South of Schick Road.**

To Whom It May Concern:

The attached package is being provided electronically. Clover Communities Bartlett LLC, has the property referenced above under contract and is seeking a concept review of the use and general layout of the property prior to proceeded with approvals.

#### **Clover Communities**

Clover Communities Bartlett LLC is a subsidiary of Clover Management West “Clover” and is proposing a 119-unit senior living complex. The proposed project is age restricted multi-family residential. If approved for construction the project would break ground in Spring, 2022. Clover Communities has been in business for over 35 years providing independent senior living with over 60 communities currently in operation in New York, Pennsylvania, Ohio, Indiana, Missouri and Kentucky. Clover is expanding its operations to Illinois, Michigan, North and South Carolina, and Tennessee. While many senior care facilities were devastated by COVID-19, Clover Communities continued operations with regulations and were able to continue with development and construction of new sites.

#### **Project Introduction**



Clover Communities Bartlett LLC has proposed 119-units of market rate senior (age-restricted 55 and older) independent living. The project would sit on approximately-10 acres and consist of rental units in a single 3-story wood frame building approximately 28 feet in height measured to the eave of the roof. The unit mix will consist of (4) 1 bedroom, 1-bathroom units, (97) 2-bedroom, 1-bathroom units, and (18) 2 bedroom, 1 and ½ bathroom units. The building includes 90 leasable interior storage units and 40 leasable exterior garage units. Each unit is fully equipped with a kitchen, dishwasher, and washer and dryer. The building includes a large service elevator, ample common space throughout including a Community Room, Common Patio area, Common garden/open space, Family Room, Fitness Area, Salon, Coffee Bar and Lounge.

### **Background Information**

Clover was started in 1987 by its current owner and President, Mr. Michael Joseph. Clover consists of development, construction, and property management and currently owns or manages more than 10 million square feet of property, including market rate, senior Independent Living communities, totaling over 6,500 units. Additionally, Clover manages many commercial spaces. The portfolio consists of more than 150 senior independent living properties in New York, Ohio, Indiana, Kentucky, Missouri, and Pennsylvania.

### **Aging in Place**

The U.S. Centers for Disease Control and Prevention defines aging in place as "the ability to live in one's own home and/or community safely, independently, and comfortably, regardless of age, income, or ability level". Census.gov estimates that by 2030 all baby boomers will be older than 65, accounting for 1 for every 5 residents in the United States.

Residents staying within their community and region as they age is identified by many organizations as an overall health benefit to the community. According to AARP in 2014, "In addition to preventing social isolation, allowing older people to stay involved in their communities [aging in place] has been found to have health benefits. Civic engagement and volunteering can reduce mortality; increase physical function, muscular strength, and levels of self-rated health; reduce symptoms of depression and pain; and increase life expectancy." An additional benefit for choosing to age in place with independent living is freeing up single family homes for new buyers creating market demand for existing housing stock and increasing population density without demand on the school districts.

Clover provides an independent living option to the aging population that is seeking to stay within its community. Providing rental units at market rate targets populations that do not qualify for income restricted properties and do not want or cannot afford full-service care type facilities with meals, housekeeping, and medical assistance. Additionally, rental units do not create legacy costs and burdens



to beneficiaries that may not qualify to occupy properties in a community with an age restricted Home Owners Association. Clover structures leases with several options for long- or short-term rental. All of Clover's leases have provisions that allow residents to move quickly if health declines and a medical care facility is needed. Clover has no "buy-in" costs that make aging in place restrictive to middle class aging populations.

### **Site Considerations**

Access and accessibility are major factors in selecting a Clover site. Residents who are aging restrict their driving and drive times to access shopping, worship, and healthcare independently. The proposed site is conveniently located for residents and provides little impact to the residential property to the west. The proposed orientation of the building would be toward Rt 59 with the west elevation consisting of patios and outdoor open space for residents. A detention pond would be located in the southwest corner of the property nearest the existing storm sewer connection. Utilities and primary access to the property would be from Schick Road utilizing the existing access road and easement. Due to the low impact independent senior living has on traffic counts this is an ideal entry point with the lighted intersection of IL 59 and Schick Road. At this point we intend to apply for a right-in, right-out curb cut on IL 59 as a secondary means of access subject to IDOT consideration.

There is existing wetland on the northeast corner of the lot. We intend to preserve this area with no need to cause disturbance.

### **Clover Survey**

Clover surveys its 10,000+ residents bi-annually to determine market trends and marketing philosophy. Through the survey important information is derived such as:

- The average age of Clover residents is 76 years or older.
- 27 percent of residents come from an existing apartment and 61 percent come from a single-family home (12% other).
- 97 percent of residents come from 1-5 miles of the property.
- 79 percent of residents live alone.
- 45 percent of residents chose Clover based on the location.

### **Impact Considerations**

The proposed project has the potential to bring up to 236 residents to Bartlett based on full capacity and double occupancy of all units. However, based on typical market trends and experience, 79 percent of residents in a Clover project are single occupants, therefore the expected increase in population would be 142 residents at full occupancy.





While no empirical data exists for age-restricted independent senior living emergency call generation, Clover estimates approximately one call for service weekly based on call history at over 60 locations. The majority of calls are medical assistance related. Call trends also increase with the age of the building as there is a direct correlation to the age of the residents within the building. The average Clover residents stays for 10 years.

Using the assumption of 1 additional Fire/EMS per week, the proposed development would generation approximately 52 additional calls per year. This does not assume that most of the residents are current Bartlett residents and would generate the same call volume in their current living situation.

#### **Site Specific Safety Features:**

Clover Communities Bartlett is an age-restricted senior independent living project. Independent living does not provide for medical care; residents are ambulatory. The proposed building in addition to being fully sprinkled with have emergency exit plans clearly labeled in each unit as well as hallways and common areas. Resident drills are conducted to re-enforce safe exit plans in case of a fire. The main elevator is full sized to accommodate a full-sized stretcher. The drive aisle around the exterior of the building is sized for full-turns for all fire apparatus. Each unit has a balcony or patio to access outdoors. There is no commercial kitchen on-site, reducing potential for large scale fires. Lastly, residents can quickly end lease terms when medical care becomes necessary because of decreased mobility.

#### **Community Living Benefits**

Clover communities are designed as retirement communities allowing for independent living in a community setting.

Individual units are equipped with the following:

- Fully equipped kitchen with breakfast bar
- In unit washer and dryer
- Central air conditioning
- Energy-saving appliances
- Sliding glass doors leading to private patio/balcony
- Walk-in shower available
- Emergency pull-cord system

The proposed building and all clover buildings are equipped with the following:

- On-site beauty salon/barber shop
- Community room with patio
- Community activities and planned trips





- Community lounge with fireplace
- Fully handicapped-accessible
- Centrally located elevator service
- Wide, well-lit hallways with handrails
- Secure building, TV-monitored entrance with controlled access
- Fitness center
- Indoor central mailbox system
- Indoor trash rooms
- Coffee room with seating
- Family room
- Game room
- Individual storage units
- Sprinkler system throughout building
- Smoke/CO detectors throughout building

The building amenities are included in every tenant lease and do not require additional deposits. Resident keys access all the amenities. This facility is not open to the public or rentable without a lease. These facilities are designed to be an extension of the individual tenant units specific to senior independent living.



## Apartment Interiors





## Apartment Interiors





## Common Areas



Patio  
&  
Reading Room





## Common Areas



Fitness Center  
&  
Coffee Bar



## Events





## Events

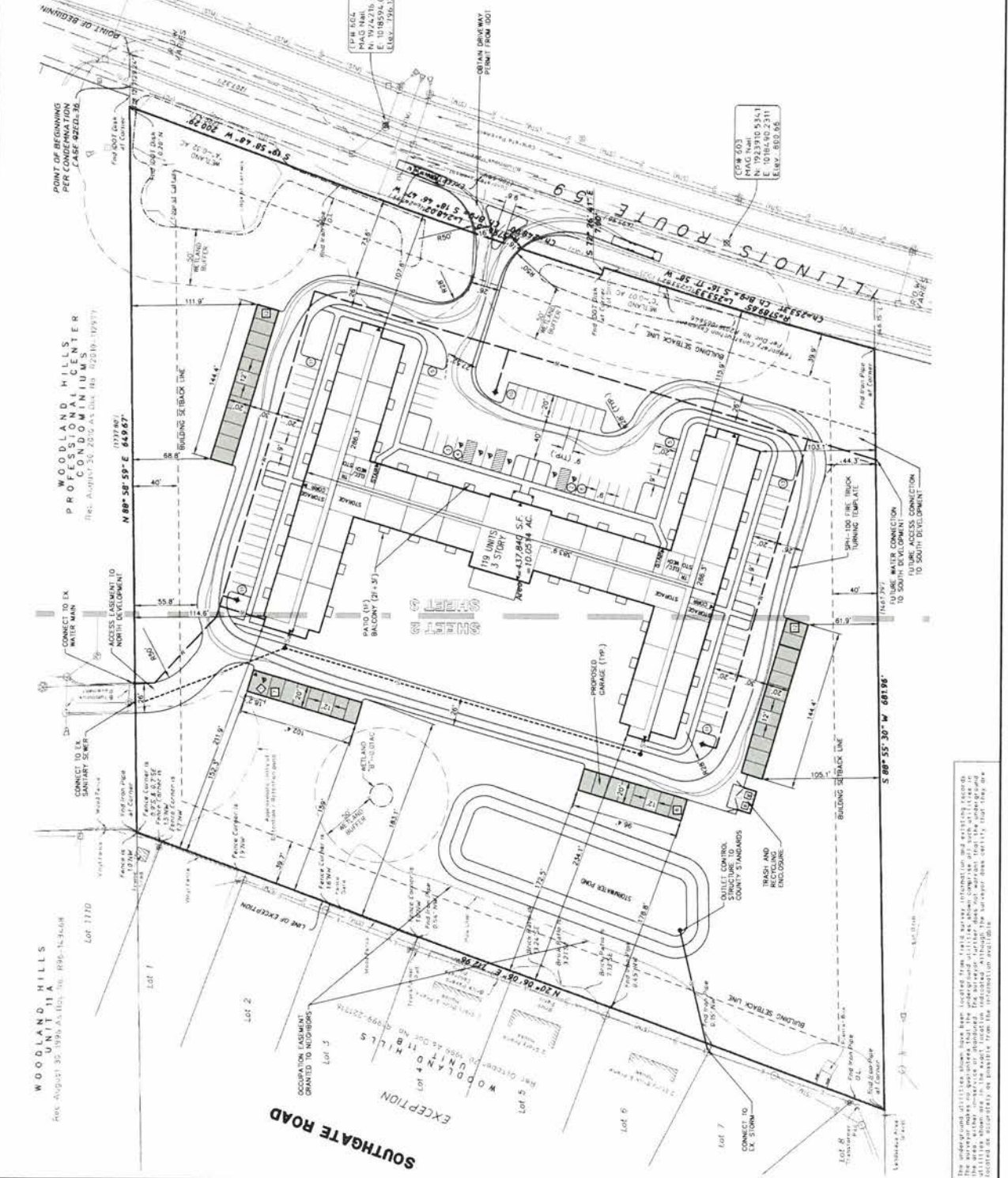




**CLOVER COMMUNITIES - BARTLETT**  
 RTE 59 & SHICK RD, BARTLETT, IL 60103  
 REVISED CONCEPT PLAN  
 CLIENT: CLOVER CONSTRUCTION  
 ARCHITECT: MARGARET HILL GROUP  
 1245 W. 145th Street  
 BLOOMINGTON, IL 61710  
 314-545-0248  
 MIDDLEWESTERN CONSULTANTS  
 2811 May Drive, Suite 200, Naperville, IL 60563  
 Tel: 630-334-9999, Fax: 630-334-9998  
 www.middlewestern-consultants.com

SITING DATA SHEET:	
NON-GARAGE BUILDING AREA	437,846 SF (10,000 AC)
TOTAL BUILDING AREA	44,250 SF (10.13 AC)
TOTAL GARAGE BUILDING AREA	54,002 SF (12.33 AC)
TOTAL BUILDING FLOOR AREA	98,252 SF (22.46 AC)
TOTAL GARAGE FLOOR AREA	142,200 SF (32.50 AC)
ADJ. PARKING SPACES	6 SPACES
STANDARD GARAGE SPACES	38 SPACES
TOTAL PARKING SPACES	44 SPACES
FLOOR AREA, WATER	0.33

**REQUIRED PARKING SPACES:** 1 UNIT PER BUILDING UNIT  
 119 UNITS OF SPACES - 40 SPACES REQUIRED  
 121 SPACES PROVIDED > 40 SPACES REQUIRED





---

# IMPACT ANALYSIS

September, 2021

---

Clover Group Inc.  
348 Harris Hill Road  
Williamsville, NY 14221



Live like you.

35100

# Executive Summary

Clover Communities Bartlett LLC, a subsidiary of Clover Construction Management West Corporation, “Clover” has proposed a 119-unit senior independent living complex to be located on the approximately 10 acre vacant parcel on the west side of IL Rt-59, south of Schick Road and north of Army Trail Road. The proposed project would be classified as age restricted multi-family residential. If approved for construction the project would break ground in 2022.

The property is currently zoned B-2 Planned Unit Development (PUD) and was previously approved for both retail and age restricted housing. Clover Communities Bartlett LLC is seeking a PUD amendment to allow the property to be used entirely for an independent, market-rate senior housing development.

## Considerations for the Village of Bartlett are:

- The desire to approve a development and amend the zoning for a development to provide an opportunity for residents of the community to age in place;
- The need for market rate senior independent living; and
- The financial impact of the proposed development to the overall Village budget.

The proposed development is a 55+ age restricted/active adult community with no medical amenities. The tenants are active with discretionary buying power and have strong ties to the community. The proposed site has been vacant for over 40 years and has not been developed as commercial due to its mid-block location with difficult access.



## PROJECT INTRODUCTION

Clover Communities Bartlett LLC has proposed 119-units of market rate senior independent living. Market rate means the cost of units are similar to other rental property in the vicinity and there are no “buy-ins” or additional upfront costs to enter the community; rents are not dependent on income restrictions or voucher programs. Senior living is considered 55 years or older per federal aging/housing guidelines. The project would sit on approximately 10 acres located on the vacant land on the west side of IL Rt-59, south of Schick Road and north of Army Trail Road and consist of rental units in a single 3-story wood frame building approximately 28 feet in height measured to the eave of the roof. The unit mix will consist of: (4) 1- bedroom, 1-bathroom units, (97) 2-bedroom, 1-bathroom units, and (18) 2-bedroom, 1-and ½-bathroom units. The building includes interior storage units and leasable exterior garage units. Each unit is fully equipped with a kitchen, balcony/patio, living area, and washer and dryer. The building includes a large service and passenger elevator, ample common space throughout, including additional storage units, commercial washer and dryers, community Room, communal patio area, common garden/open space courtyard, family room, game room, fitness area, salon, coffee bar and lounge.

## BACKGROUND INFORMATION

Clover was started in 1987 by its current owner and President, Mr. Michael Joseph. Clover consists of development, construction, and property management and currently owns or manages more than 10 million square feet of property, including market rate, senior Independent Living communities, totaling over 6,500 units. Additionally, Clover manages many condo associations, HOA’s and commercial spaces. The portfolio consists of more than 60 senior independent living properties in New York, Ohio, Indiana, Kentucky, Missouri, Michigan, and Pennsylvania.

### Community Information

Clover communities are designed as retirement communities allowing for independent living in a community setting.

Individual units are equipped with the following:

- Fully equipped kitchen with breakfast bar
- In unit washer and dryer
- Central air conditioning

- Energy-saving appliances
- Sliding glass doors leading to private patio/balcony
- Walk-in shower available
- Emergency pull-cord system

The proposed building and all clover buildings are equipped with the following:

- On-site beauty salon/barber shop
- Community room with patio
- Community activities and planned trips
- Community lounge with fireplace
- Fully handicapped-accessible
- Centrally located elevator service
- Wide, well-lit hallways with handrails
- Secure building, TV-monitored entrance with controlled access
- Fitness center
- Indoor central mailbox system
- Indoor trash rooms
- Coffee room with seating
- Family room
- Game room
- Individual storage units
- Sprinkler system throughout building
- Smoke/CO detectors throughout building

The building amenities are included in every tenant lease and do not require additional deposits. Resident keys access all the amenities. This facility is not open to the public or rentable without a lease. These facilities are designed to be an extension of the individual tenant units specific to senior independent living.



**Unit Layouts:**  
**1 Bedroom**



**2 Bedroom**



**Coffee Bar:**



**Game Room:**



**Community Room and Patio:**



**Library:**





## Patio:



## AGING IN PLACE

The U.S. Centers for Disease Control and Prevention defines aging in place as "the ability to live in one's own home and/or community safely, independently, and comfortably, regardless of age, income, or ability level". Census.gov estimates that by 2030 all baby boomers will be older than 65, accounting for 1 in every 5 residents in the United States.

Residents staying within their community and region as they age is identified by many organizations as an overall health benefit to the community. According to AARP in 2014, "In addition to preventing social isolation, allowing older people to stay involved in their communities [aging in place] has been found to have health benefits. Civic engagement and volunteering can reduce mortality; increase physical function, muscular strength, and levels of self-rated health; reduce symptoms of depression and pain; and increase life expectancy." An additional benefit for choosing to age in place with independent living is freeing up single family homes for new buyers creating market demand for existing housing stock and increasing population density without increased demand on the school districts.



Clover provides an independent living option to the aging population that is seeking to stay within its community. Providing rental units at market rate targets populations that do not qualify for income restricted properties and do not want or cannot afford full-service care or resort lifestyle type facilities with meals, housekeeping, and medical assistance. Additionally, rental units do not create legacy costs and burdens to beneficiaries that may not qualify to occupy properties in a community with an age restricted Home Owners Association. Clover structures leases with several options for long- or short-term rental. All of Clover's leases have provisions that allow residents to move quickly if health declines and a medical care facility is needed.

According to the Chicago Metropolitan Area for Planning (CMAP), "Planning for an aging population is also an investment in the well being of all community members ... creating healthy, sustainable places that livable for all residents".

## 55 AND OLDER INDEPENDENT LIVING

Independent living is also referred to as active adult communities or age restricted communities. The federal Department of Housing and Urban Development (HUD) regulates senior communities to ensure compliance with the Housing for Older Persons Act of 1995 (HOPA). To quote the Federal Register of 1999/Rules and Regulations:

***"There continues to be confusion concerning what is often referred to as the 80/20 split. HOPA states that the minimum standard to obtain housing for persons who are 55 years of age or older is that "at least 80%" of the occupied units be occupied by persons 55 years or older. There is no requirement that the remaining 20% of the units be occupied by persons under the age of 55, nor is there a requirement that those units be used only for persons where at least one member of the household is 55 years of age or older. Communities may decline to permit any persons under the age of 55, may require 100% of the units have at least one occupant who is 55 years of age or older, may permit up to 20% of the occupied units to be occupied by persons who are younger than 55 years of age, or set whatever requirements they wish, as long as at least 80% of the occupied units are occupied by one person 55 years of age or older...."***

Clover communities have adopted the HOPA guidelines, consistently maintaining our properties exclusively for seniors. We choose to require all residents to be 55 years of age, with the exception of a permanently, fully disabled person. For example – our buildings are handicapped accessible with an elevator; we would never turn someone away who is paralyzed but is under 55 years of age. This is a rare situation but is covered by HOPA:

***"The final regulation retains the provision that a unit occupied by a person or persons as a reasonable accommodation to the disability of an occupant need not be counted..."***

In order to keep the designation of a senior living community, HUD requires management to conduct an audit of its residents every two years and submit the age of each person living in the community to HUD.

## SITE CONSIDERATIONS

Clover performs a thorough review of every property sought for development based on a proprietary analysis of local conditions. Primary consideration is made based on the area demographics.

The current population of the Village of Bartlett as of 2020 is 41,105, of which 12.8% or 5,262 persons are over the age of 65. The 65+ population has grown 7.2% in the last 20 years. In the next five years, CMAP predicts Bartlett's 65+ population will increase 53 percent to 9,605. Clover's target market area is a three-mile radius. There is a population of 46,852 within three miles of the property and over 13% of the population is over the age of 65. Of that population, 60 percent are homeowners with the average income of \$94,443. Based on the average income, most seniors would be unable to qualify for income-restricted living facilities. If the average senior resident in the three-mile radius sold their home, they would be able to live with Clover for over 10 years without using income or savings other than the home sale. In order to income qualify for senior living the income cap for a 1-person household in DuPage County is 52,200.

Access and accessibility are major factors in selecting a Clover site. Residents who are aging restrict their driving and drive times to access shopping, worship, and healthcare independently. With frontage on the IL-59 corridor, the site is highly visible and easily accessible. According to IDOT, some 32,000 vehicles pass the property on a daily basis.

The mid-block location is ideal for access to the site for seniors as seniors tend to have limited trips during non-peak hours (ITE Handbook and GHA Traffic Impact Study 2021). The site which is currently identified for retail has been vacant for over 40 years with limited interest from retail due to the mid-block location and the right in right out movement on IL-59. Senior living will complement the well-established residential community to the west as it provides a buffer from the traffic of IL-59 but limited noise and activity such that a retail center would create.

There are no market rate independent senior living facilities currently in Bartlett. There is an age restricted continuum of care center and an assisted living geared toward dementia care. There are no market rate senior independent living within a 3 mile radius of Bartlett with other centers either being full care or low and moderate income restricted.

Given the maturity of the Bartlett area over the last 20 years, future residents of Clover would be within minutes of an abundance of daily consumer services, restaurants, recreation/entertainment options, religious institutions, and healthcare. In DuPage County there are 2 seniors for every 1 market rate senior unit.

### Clover Survey

Clover surveys its 10,000+ residents bi-annually to determine market trends and marketing philosophy. Through the survey important information is derived such as:

- The average age of Clover residents is 81 years or older.



- 27 percent of residents come from an existing apartment and 61 percent come from a single-family home (12% other).
- 97 percent of residents come from 1-5 miles of the property.
- 79 percent of residents live alone.
- 45 percent of residents chose Clover based on the location.

## VILLAGE OF BARTLETT

### Future Taxes

Clover Communities Bartlett LLC will pay full non-homestead property taxes and is not seeking any tax abatement for the project. Clover will pay all taxes and impact fees without generating any new school-aged residents. The following are the assumptions used in calculating potential taxes:

- The subject property was billed and paid \$15,767.52 for taxes on the vacant parcel in 2020.
- The Village of Bartlett levies 9.902% of the tax bill, which equals \$1,561.24 in 2020.
- The proposed project would start construction Spring, 2022 and would take 17 months to complete.
- The first full assessment would be no earlier than 2024.
- Project occupancy will be commensurate with full assessment.
- The Assumed Assessed Value of the project would be approximately \$12,817,600
- Average Rents will range from \$1550 to \$1800 per month and include utilities
- The project includes 119 units.
- The Assumed Equalized Value would be approximately \$4,274,670

Clover Estimated Real Estate Taxes	Projected Tax Bill (summer/winter combined)	Bartlett Share (9.902%)	Per Unit (118 units)
2024-2025	\$392,860	\$38,901	\$3,301

The net increase to Bartlett is \$37,340 at minimum annually. This does not include the spending power that continues with residents aging in place and freeing up single family homes for new residents with additional spending power.

The proposed project has the potential to bring 238 new residents to Bartlett based on full capacity and double occupancy of all units and/or sales and purchases of existing properties. However, based on typical market trends and experience, 79 percent of residents in a Clover project are single occupants, therefore the expected increase in population would be 143 residents at full occupancy.

## Commercial Comparison

The property has been vacant over 35 years awaiting a commercial development. The property has been identified as difficult for commercial development due to right-in, right-out only access from IL Rt 59 and the midblock location. In the past, both Mid-America and CBRE passed on marketing the site for retail as the location would not generate the interest.

Using Orchard Plaza at 962-980 Bartlett Road as a comparison, the site may hold up to 15,000 square feet of retail space accounting for detention, setbacks, and parking requirements. The Orchard Plaza site is approximately 14,500 square feet of retail. The Assessed value of the strip center development is \$474,950 according to 2020 DuPage County tax records. The taxes paid to the Village of Bartlett were \$4,305.88. Assuming \$1,000,000 annually of retail sales, Bartlett would capture approximately \$10,000. The total value would be estimated at \$52,938 with no vacancy.

The proposed senior development would net more to the Village of Bartlett in it's first fully-assessed year and would add additional spending power by adding new residents to the community either through the development or through the freeing up of single family homes for new residents.

## NOTES/QUESTIONS:





**Village of Bartlett  
Finance Department Memo  
2021 - 15**

**DATE:** September 27, 2021

**TO:** Paula Schumacher, Village Administrator

**FROM:** Todd Dowden, Finance Director

**SUBJECT:** 2021 Proposed Property Tax Levy

Below is a chart showing the proposed 2021 levy compared to the 2020 extension. The proposed property tax levy for 2021 totals \$11,667,364 and is \$5,877 or 0.05% less than the prior year extended amount. The General corporate levy is 0.44% less than the 2020 extension and is up \$86,000 from last year's actual levy amount. The increase is to fund the semi-annual brush pickup program. The proposed Police Pension levy is increasing 4.61% or \$97,047. The increase is due to the third year of lowering of the assumed rate of return by 0.125% to 6.875%. The Debt Service levy is lower from the prior year extended amount by \$73,963 or 2.45%.

<b>Proposed Levy Compared to Prior Year's Extension</b>				
	<b>2021</b>			
	<b>Proposed</b>	<b>2020</b>	<b>Increase</b>	<b>Percent</b>
	<b>Levy</b>	<b>Extension</b>	<b>(Decrease)</b>	<b>Change</b>
General Corporate	6,519,094	6,548,055	(28,961)	-0.44%
Police Pension	2,203,621	2,106,574	97,047	4.61%
Subtotal	8,722,715	8,654,629	68,086	0.79%
Debt Service	2,944,649	3,018,612	(73,963)	-2.45%
<b>TOTAL</b>	<b>11,667,364</b>	<b>11,673,241</b>	<b>(5,877)</b>	<b>-0.05%</b>

### Abatements

There are three abatements being proposed for the total amount of \$1,755,884. The 2017 bond issue requires an estimated payment in the amount of \$39,704 for the Fire District's share of bonds attributable to the construction of the fire station. Also, the amount of \$29,880 is to be transferred from the Brewster Creek TIF Municipal fund to the Debt Service fund to pay for its portion of the bonds. The second abatement of \$555,900 is the Sewer Fund's portion of the 2019 bond issue related to the Devon Avenue excess flow project. The third abatement of \$1,130,400 is the Water Fund's portion of the 2021A bonds for the DuPage Water Commission loan refunding. Abatement ordinances will be presented with the tax levy for final approval on December 7, 2021. The chart below itemizes the proposed debt service levy and abatement for 2021.

<b>Proposed Debt Service Levy and Abatements</b>			
<b>Bond Issue</b>	<b>2021 Levy</b>	<b>Proposed Abatement</b>	<b>Net Levy</b>
2016 GO Bonds	1,186,225	0	1,186,225
2017 GO Bonds	318,650	(69,584)	249,066
2019 GO Bonds	1,530,650	(555,900)	974,750
2021A GO Bonds	1,130,400	(1,130,400)	0
2021B GO Bonds	534,608	0	534,608
<b>TOTAL</b>	<b>4,700,533</b>	<b>(1,755,884)</b>	<b>2,944,649</b>

**2021A GO Bonds** – This bond issue was sold in January of 2021 to refinance the loan with the DuPage Water Commission for the construction of the Lake Michigan water transmission line and metering station. The issue will mature in 2039.

**2021B GO Bonds** – This bond issue was sold in January of 2021 to refund the 2012 GO Bonds. The 2012 bonds were used to fund street improvements and the Village's portion of flood mitigation along South Prospect Avenue. The issue will mature in 2031.

**2019 Sewer and 2009 Refunding** – This bond issue was sold in November 2019 to finance the Devon Avenue excess flow project and to refund the 2009 bonds issued that refunded the 2002 and 2005 bonds. The 2002 bonds were used to fund the ball fields, W. Bartlett/Naperville Road bike path, and W. Bartlett Road widening. The 2005 bonds were issued to finance the water meter change out program and most of the construction of the Village Hall. The issue will mature in 2039.

**2017 Fire Station Refunding** – This bond issue was sold in July 2017 to refund the 2007 bonds issued to finance the construction of a fire station on the west side. Abatements are based upon revenues from the Brewster Creek TIF Municipal Account and the Fire District’s share of the annual debt service. The issue will mature in 2026.

**2016 Police Station Bonds** – This bond issue was sold in November 2016. The 2016 bonds were used to fund the construction of the new Police Station. The final maturity on these bonds will be in 2036.

<b>Equalized Assessed Value (EAV) History</b>			
<b>Year</b>	<b>EAV</b>	<b>Change</b>	<b>% Change</b>
2011	1,188,318,865		
2012	1,097,765,218	(90,553,647)	-7.62%
2013	959,330,352	(138,434,866)	-12.61%
2014	950,037,843	(9,292,509)	-0.97%
2015	957,991,785	7,953,942	0.84%
2016	1,051,280,552	93,288,767	9.74%
2017	1,079,697,040	28,416,488	2.70%
2018	1,098,395,911	18,698,871	1.73%
2019	1,166,637,184	68,241,273	6.21%
2020	1,192,392,648	25,755,464	2.21%
*2021	1,235,994,426	43,601,778	3.66%

\*Estimate

**Equalized Assessed Value (EAV)**

Above is a chart showing the actual EAV for the last 10 years along with the estimate for 2021. The overall EAV estimate for 2021 assumes that EAV will increase by 3.66%.



In DuPage County, the estimate for EAV is an increase of 4%. In 2020, EAV increased in DuPage County by 3.38%. The estimate for Cook County assumes a 3% increase in EAV. This year will not be the tri-annual assessment. The last re-assessment in 2019 for the county resulted in a 11.88% increase.

**Estimated Tax Rates**

Below is a chart showing an estimate of the 2021 Cook County rate. The rate is anticipated to decrease in Cook County by 1.14 cents.

<b>Estimated 2021 Property Tax Rate - Cook County</b>				
Burden	39.07%			
EAV	427,517,357			
	<b>Total Levy</b>	<b>Loss Allowance</b>	<b>County Burden</b>	<b>Tax Rate</b>
General Corporate	6,519,094	195,573	2,623,420	0.6136
Police Pension	2,203,621	66,109	886,784	0.2074
Subtotal	8,722,715	261,682	3,510,204	0.8211
Debt Service	2,944,649	147,232	1,207,998	0.2826
<b>TOTAL</b>	<b>11,667,364</b>	<b>408,914</b>	<b>4,718,202</b>	<b>1.1036</b>
			2020 Rate	1.1150
			Rate Decrease	(0.0114)

The chart below shows the estimated 2021 tax rate for DuPage County. The DuPage County tax rate is anticipated to decrease by 1.82 cents.

<b>Estimated 2021 Property Tax Rate - DuPage County</b>				
Burden	60.50%			
EAV	802,520,881			
		<b>Loss</b>	<b>County</b>	
	<b>Total Levy</b>	<b>Allowance</b>	<b>Burden</b>	<b>Tax Rate</b>
General Corporate	6,519,094	65,191	3,983,492	0.4964
Police Pension	2,203,621	22,036	1,346,522	0.1678
Subtotal	8,722,715	87,227	5,330,014	0.6642
Debt Service	2,944,649	29,446	1,799,327	0.2242
<b>TOTAL</b>	<b>11,667,364</b>	<b>116,673</b>	<b>7,129,341</b>	<b>0.8884</b>
			2020 Rate	0.9066
			Rate Decrease	(0.0182)

The chart below shows the total EAV for the entire Village along with the total levy for all funds (General, Police Pension and Debt Service). The proposed dollar levy along with the estimate for the 2021 EAV will decrease the combined rate 1.54 cents.

<b>Estimated 2021 Property Tax Rate - Total</b>			
EAV	1,235,994,426		
		<b>Loss</b>	
	<b>Total Levy</b>	<b>Allowance</b>	<b>Tax Rate</b>
General Corporate	6,519,094	65,191	0.5327
Police Pension	2,203,621	22,036	0.1801
Subtotal	8,722,715	87,227	0.7128
Debt Service	2,944,649	29,446	0.2406
<b>TOTAL</b>	<b>11,667,364</b>	<b>116,673</b>	<b>0.9534</b>
			2020 Rate
			Rate Decrease
			(0.0154)

**Schedule**

In order to comply with state statute regarding deadlines to file a tax levy with the County Clerk's office of each county, I am recommending the time table below. The schedule includes a public hearing on October 19, 2021. The Village is not required to hold a public hearing because our increase over the prior year's extension is less than 5%. However, the Village has traditionally held a public hearing to allow for public input and I recommend we continue to do so.

Advertise public hearing	10/06/21
Hold public hearing	10/19/21
Village Board reviews estimated levy	10/19/21
Adopt levy	12/07/21
File levy - on or before	12/28/21

# Village of Bartlett



# 2021 Property Tax Levy



# Village of Bartlett

## 2021 Property Tax Levy Background

- Village levies a Property Tax for 3 purposes:
  - ✓ To help fund General Fund operating expenditures
  - ✓ To pay for Principal and Interest on General Obligation Bonds
  - ✓ To pay for the Villages contribution to the Police Pension Fund
  
- Village is a multi-county municipality and levies a tax that is distributed to 3 counties.
  - ✓ Cook (39.07% of “burden”)
  - ✓ DuPage (60.50% of “burden”)
  - ✓ Kane (0.43% of “burden”)

# Village of Bartlett

## 2021 Property Tax Levy Background

- The current years budget process drives the tax levy. The following chart shows the timeline for this tax levy:

Date	Levy Cycle
April 2021	Village Board approves budget
May 1, 2021	Budget year begins
Fall 2021	Village Board conducts public hearing and approves tax levy
March 2022 through December 2022	Village receives Cook County taxes
June 2022 through November 2022	Village receives DuPage and Kane County taxes

- The tax levy **MUST** be filed with the County Clerks office by no later than the last Tuesday in December.

# 2021 Property Tax Levy



	2021			Percent Change
	Proposed Levy	2020 Extension	Increase (Decrease)	
General Corporate	6,519,094	6,548,055	(28,961)	-0.44%
Police Pension	2,203,621	2,106,574	97,047	4.61%
Subtotal	8,722,715	8,654,629	68,086	0.79%
Debt Service	2,944,649	3,018,612	(73,963)	-2.45%
<b>TOTAL</b>	<b>11,667,364</b>	<b>11,673,241</b>	<b>(5,877)</b>	<b>-0.05%</b>

## Village of Bartlett

# 2021 Property Tax Levy



Proposed Levy Compared to Prior Year's Levy				
	2021			
	Proposed	2020	Increase	Percent
	Levy	Levy	(Decrease)	Change
General Corporate	6,519,094	6,433,094	86,000	1.34%
Police Pension	2,203,621	2,067,903	135,718	6.56%
Subtotal	8,722,715	8,500,997	221,718	2.61%
Debt Service	2,944,649	2,942,475	2,174	0.07%
<b>TOTAL</b>	<b>11,667,364</b>	<b>11,443,472</b>	<b>223,892</b>	<b>1.96%</b>

Village of Bartlett





# 2021 Property Tax Levy

## Proposed Debt Service Levy and Abatements

2021

Proposed  
Levy

Proposed  
Abatement

Bond Issue

Net Levy

2016 GO Bonds	1,186,225	0	1,186,225
2017 GO Bonds	318,650	(69,584)	249,066
2019 GO Bonds	1,530,650	(555,900)	974,750
2021A GO Bonds	1,130,400	(1,130,400)	0
2021B GO Bonds	534,608	0	534,608

**TOTAL**                      **4,700,533**                      **(1,755,884)**                      **2,944,649**

## Village of Bartlett



# 2021 Property Tax Levy

## Levy History

Year	General	Police Pension	Debt Service
2011	7,058,094	1,235,728	1,003,677
2012	7,058,094	1,208,649	1,524,538
2013	6,558,094	1,152,526	1,680,000
2014	6,433,094	1,231,270	1,680,000
2015	6,433,094	1,152,049	1,680,334
2016	6,433,094	1,254,636	2,866,547
2017	6,433,094	1,377,155	3,122,938
2018	6,433,094	1,583,071	3,133,855
2019	6,433,094	1,730,426	3,085,405
2020	6,433,094	2,067,903	2,942,475
2021	6,519,094	2,203,621	2,944,649

# Village of Bartlett

# 2021 Police Pension Tax Levy



Levy History		
Fiscal Yr	\$ Amount	Annual Return
2011	1,235,728	4.60%
2012	1,208,649	9.20%
2013	1,152,526	8.90%
2014	1,231,270	7.70%
2015	1,152,049	7.25%
2016	1,254,636	4.18%
2017	1,377,155	7.75%
2018	1,583,071	6.06%
2019	1,730,426	8.87%
2020	2,067,903	4.36%
2021	2,203,621	25.68%

## Village of Bartlett



# 2021 Police Pension Tax Levy

- Annual Required Contribution \$2,203,621:
  - ✓ Total increase of \$135,718
  - ✓ \$126,977 increase due to assumed investment rate reduction
  - ✓ No retirements
  - ✓ Four new hires to Tier 2
  - ✓ Very good return on investments offset new members





# 2021 Property Tax Levy

## Equalized Assessed Value (EAV) History

Year	EAV	Increase	% Change
2011	1,188,318,865		
2012	1,097,765,218	(90,553,647)	-7.62%
2013	959,330,352	(138,434,866)	-12.61%
2014	950,037,843	(9,292,509)	-0.97%
2015	957,991,785	7,953,942	0.84%
2016	1,051,280,552	93,288,767	9.74%
2017	1,079,697,040	28,416,488	2.70%
2018	1,098,395,911	18,698,871	1.73%
2019	1,166,637,184	68,241,273	6.21%
2020	1,192,392,648	25,755,464	2.21%
*2021	1,235,994,426	43,601,778	3.66%

\*Estimate

# Village of Bartlett



# 2021 Property Tax Levy

Estimated 2021 Property Tax Rate - Cook County		County		
Burden	39.07%	Loss Allowance	Burden	Tax Rate
EAV	427,517,357	Total Levy		
General Corporate	6,519,094	195,573	2,623,420	0.6136
Police Pension	2,203,621	66,109	886,784	0.2074
Subtotal	8,722,715	261,682	3,510,204	0.8211
Debt Service	2,944,649	147,232	1,207,998	0.2826
<b>TOTAL</b>	<b>11,667,364</b>	<b>408,914</b>	<b>4,718,202</b>	<b>1.1036</b>
			2020 Rate	1.1150
			Rate Decrease	(0.0114)

Cook County

Rate Estimate

Village of Bartlett

# 2021 Property Tax Levy



## DuPage County

Estimated 2021 Property Tax Rate - DuPage County		County		
Burden	60.50%	Loss	Burden	Tax Rate
EAV	802,520,881	Allowance	County Burden	
General Corporate	6,519,094	65,191	3,983,492	0.4964
Police Pension	2,203,621	22,036	1,346,522	0.1678
Subtotal	8,722,715	87,227	5,330,014	0.6642
Debt Service	2,944,649	29,446	1,799,327	0.2242
<b>TOTAL</b>	<b>11,667,364</b>	<b>116,673</b>	<b>7,129,341</b>	<b>0.8884</b>
			2020 Rate	0.9066
			Rate Decrease	(0.0182)

## Rate Estimate

## Village of Bartlett

# 2021 Property Tax Levy



## Estimated 2021 Property Tax Rate - Total

EAV	1,235,994,426		
		<b>Loss</b>	
	<b>Total Levy</b>	<b>Allowance</b>	<b>Tax Rate</b>
General Corporate	6,519,094	64,331	0.5326
Police Pension	2,203,621	20,679	0.1800
Subtotal	8,722,715	85,010	0.7126
Debt Service	2,944,649	30,983	0.2407
<b>TOTAL</b>	<b>11,667,364</b>	<b>115,993</b>	<b>0.9534</b>
		2020 Rate	0.9688
		Rate Decrease	(0.0154)

Rate Estimate

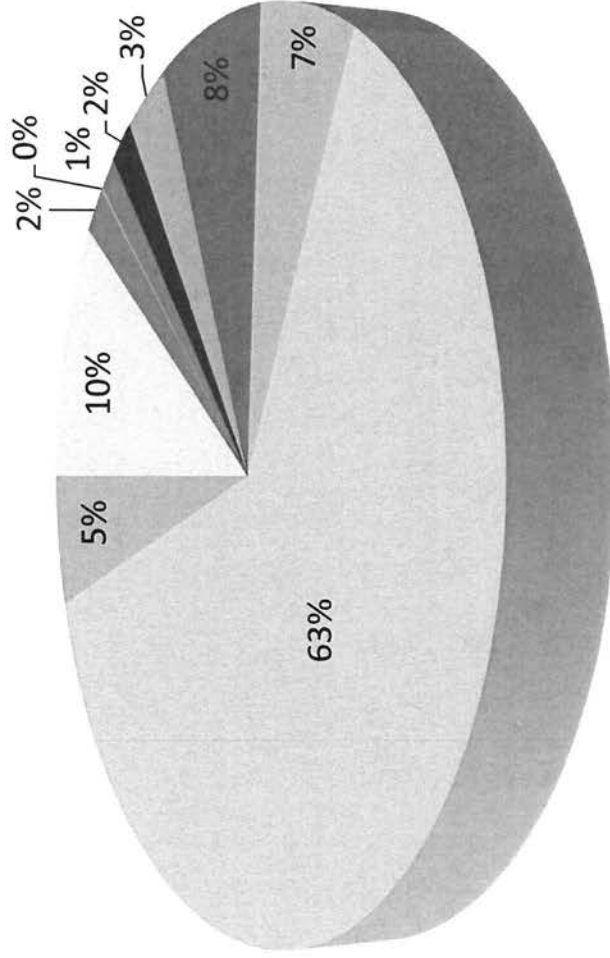
Village of Bartlett



# 2021 Property Tax Levy



**DuPage Tax Rates**



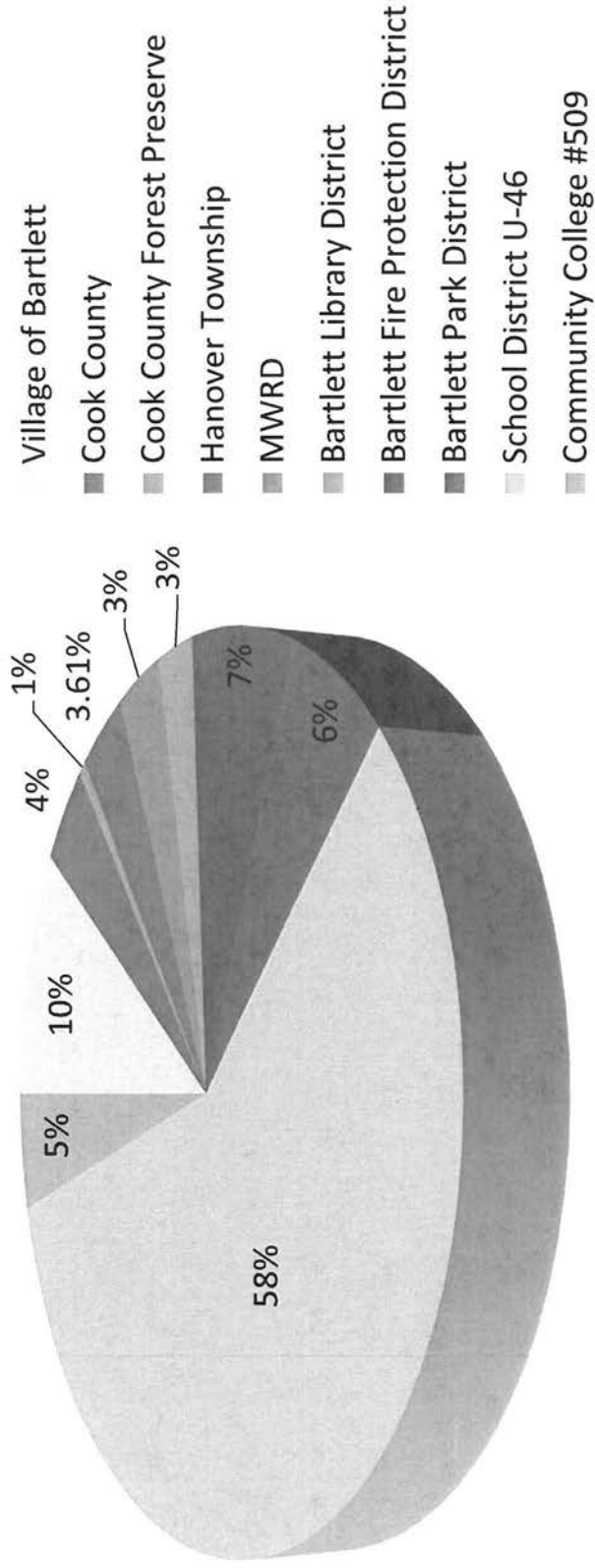
- Village of Bartlett
- DuPage County
- DuPage Airport
- Forest Preserve District
- Wayne Township
- Bartlett Public Library District
- Bartlett Fire Protection District
- Bartlett Park District
- School District U-46
- Community College #509

## Village of Bartlett

# 2021 Property Tax Levy



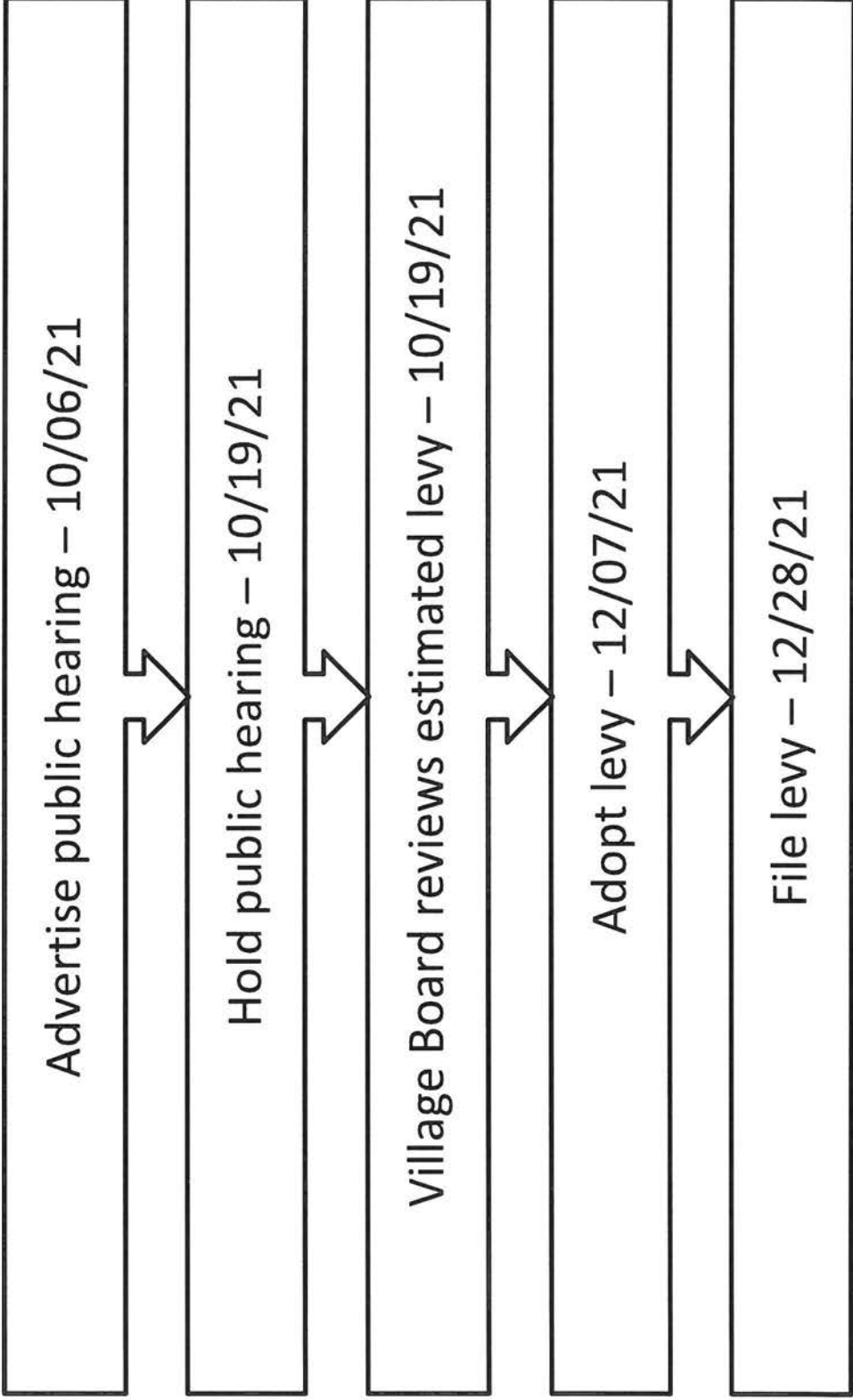
## Cook Tax Rates



# Village of Bartlett



# 2021 Property Tax Levy



**Village of Bartlett**