

APPLICANT'S EXPLANATION AND PROPOSAL



Loren Shapiro AICP
Planning Manager
City of Carrollton
Development Services
1945 E. Jackson Road
Carrollton TX 76006

December 17, 2019

RE: Heritage at Creek Valley
4320 Creek Valley Blvd
Carrollton, TX

Dear Mr. Shapiro,

We are pleased to present a new Senior Living Community to the City of Carrollton, please contact me with any questions.

PROJECT SCOPE OF WORK:

This new 140 unit Independent Living, Assisted Living and Memory Care Community will be building at the northwest corner of Creek Valley Boulevard and Indian Run Drive in Carrollton, Texas. The building will be 2 stories to the east and 3 stories to the west to fit the scale of buildings in the neighborhood. The building occupancy will be I-2 condition 1. The assumed construction type is II-A non-combustible.

The exterior of the building will be a mixture of brick and stone with accents of wood and metal.

The existing site is Zoned LR-2 (Local Retail District) we are requesting a Planned Development Permit from the City of Carrollton for the site. The building must be three stories for the appropriate mix of residents and amenity space.

The site and building will include the follow spaces: (conceptual design phase)

- Approximately 150,000 sf total
- Amenity spaces for resident use: Living, Dining, Activity, Spa, Library, etc....
- Food Service spaces including a Main Kitchen and two serving kitchens
- Offices and staff spaces
- Maintenance, housekeeping and storage areas
- Outdoor areas for resident use
- Independent Living Units 54
- Assisted Living Units 62
- Memory Care Units 24
- Total Units 140
- Total parking 108

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ABOUT HERITAGE COMMUNITIES:

Over the last 17 years, the owners of Heritage Communities have developed and successfully operated several senior housing communities; all of which have continued to operate under the organization's leadership. Our communities offer services ranging from independent living to assisted living and specialized memory care programs. At each location we establish a reputation for exceptional care, and our facilities become an integral part of the communities they serve. Heritage Communities is a member of NIC, Argentum, and the state associations where their properties reside.

In 2019, Heritage Communities was "Great Place to Work" certified. The company's original book, *In a Good Place*, won a Best of the Best Innovation Award at the national Argentum conference. Heritage operates using The Entrepreneurial Operating System (EOS) which promotes discipline, accountability and systematic improvement as the company grows.

HERITAGE COMMUNITIES CORE VALUES:

Living Better at Heritage Communities with:

TRUST: We will follow through with what we say we'll do.

RESPECT: We will be courteous and thoughtful in words and actions.

FUN: We will create opportunities to make life more enjoyable.

COMPASSION: We will treat everyone as if they are part of our family

All while maintaining the highest degree of excellence.

Farhan Khan, Owner CEO - Mr. Khan has over 25 years of commercial and residential real-estate experience with a particular focus on healthcare. He began his real estate career as an intern in 1992 working to develop town-home developments for seniors and medical office buildings. Mr. Khan is a principal and co-founder of Heritage and a graduate in architecture from the University of Nebraska-Lincoln. Mr. Khan has been involved in the successful development and operation of over 1300 units of senior housing. Mr. Khan's senior housing experience allows him to provide insight from inception (design, construction and financing) through completion (operations and marketing).

Nate Underwood, Owner President - Mr. Underwood began his career in senior housing in 2002 as a developer after spending some time in commercial real estate development. A graduate of the University of Nebraska-Lincoln, Underwood was a co-founder of Heritage. Mr. Underwood's expertise is in evaluating facility financial performance, overseeing developments and asset management. He has been involved in the successful development and operation of over 1300 units of senior housing. Mr. Underwood works in all aspects of a senior housing project from development and construction to marketing and operations.

HERITAGE COMMUNITIES PORTFOLIO:

Shalimar Gardens Assisted Living and Memory Care, Fremont, NE (81 units)
Northern Hills Assisted Living, Sioux City, IA (64 units)
Northern Hills Independent Living, Sioux City, IA (71 units)
Fox Run Assisted Living, Council Bluffs, IA (66 units)

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College View Assisted Living and Memory Care (58 units)
Meridian Gardens, Columbus, NE (83 units)
Heritage Pointe Assisted Living and Memory Care Omaha, NE (100 units)
Heritage Ridge Retirement Community Bellevue, NE (146 units)
Independent Living, Assisted Living, and Memory Care
Orchard Pointe Assisted Living and Memory Care, Surprise, Arizona (106 units)
Heritage at Sterling Ridge, Omaha, Nebraska (108 units)
Heritage at Legacy Omaha, Nebraska (121 units)
Orchard Pointe at Arrowhead, Glendale, Arizona (100 units)
Heritage at Sagewood, Grand Island, NE (87 units)
Orchard Pointe at Terrazza (116 units), Peoria, AZ

CURRENTLY UNDER CONSTRUCTION

Heritage at Fountain Point (90 Units), Norfolk, NE
Fox Run Independent Living and Memory Care (78 units), Council Bluffs, IA

For more information please visit www.heritage-communities.com

Sincerely,

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