



CHARTER TOWNSHIP OF

West Bloomfield MICHIGAN

West Bloomfield, Michigan Housing Market Study

Final Report

March 12, 2019



Prepared by:



LandUseUSA
UrbanStrategies

Table of Contents

Narrative Report

<u>INTRODUCTION</u>	Page 1
<u>EXECUTIVE SUMMARY</u>	Page 4
Market Supply and Demand	Page 4
Market Gaps and Potential	Page 6
Missing Housing Formats	Page 8
Real Estate Analysis	Page 10
Target Market Analysis	Page 12
Target Market Profiles	Page 14
Contract or Cash (Net) Rents	Page 16
Continuing Care Facilities	Page 18
<u>LEADERSHIP ADVISORY REPORT</u>	Page 20
<u>DEVELOPER ADVISORY REPORT</u>	Page 23

Residential Market Study and Target Market Analysis

West Bloomfield Township, Michigan | 2019

Prepared by LandUseUSA | Urban Strategies

INTRODUCTION

West Bloomfield is a Charter Township located in Oakland County, Michigan. It is a primarily residential, developed, suburban community that is home to 28 lakes, 150 ponds, more than 3,500 acres of protected wetlands, and three (3) major watersheds: the Huron, Clinton, and Rouge River watersheds. It contains many unique natural features with over 2,500 acres of protected woodlands, wildlife habitats, walking trails, paths and other environmental resources. A Township Center District is the heart of the business community where the Township encourages a mix of uses and cohesive design so that the Orchard Lake Road Corridor located within the Township Center District will contain authentic, timeless, and vibrant places, in both the built and natural environment.

The Charter Township of West Bloomfield has had a long standing history of community planning in Michigan. The Township adopted its first zoning ordinance as early as 1942 and the first Master Plan in 1963. Between 1960 and 1970, the Township experienced rapid growth and in response, a land use plan was compiled. In 1975, the Master Land Use Plan was updated and again in 1990, 1994, 2005 and 2010.

The West Bloomfield Master Plan guides the future development of the Township. It provides the opportunity for comprehensive planning based on the community's stated goals. The community has expressed its intention to preserve natural resources while encouraging land use development; balance the desires and needs of residents, businesses, and property owners; and establish a pattern of land use which will provide a sustainable community.

A sustainable community manages its resources and balances competing interests. This includes protecting the Township's natural resources; providing recreational opportunities; promoting community health and physical activity by providing parks, trails, community aquatic centers, and walkable areas; preserving the character and desirability of the community to attract new residents, retain existing residents, support community businesses and attract new businesses.

In 2010, the Master Plan identified the West Bloomfield vision to be a highly sought after environmentally and business friendly timeless community; providing an exceptional quality of life with safe neighborhoods and desirable schools, award winning services, abundant leisure opportunities, diverse businesses and world class healthcare.

In 2015, the Planning Commission reaffirmed the overall planning policies of the Master Land Use Plan, however, identified that sections of the Township's Master Land Use Plan were in need of update. Before embarking on revising the Master Land Use Plan and preparing ordinance amendments, the Township engaged LandUseUSA | Urban Strategies to conduct a comprehensive study that could serve as a basis for development of sustainable contemporary land use and housing policies.

Note: The Introduction on the preceding page is a refined narrative originating from the Master Plan and Code of Ordinances for the Charter Township of West Bloomfield. That original composition was prepared by the planning consultants of Giffels Webster.

The scope of the Residential Market Study and Target Market Analysis was to provide a detailed comprehensive analysis of the residential market encompassing the following:

- current and projected local housing needs
- supply-demand and gap analysis
- local and regional home-ownership and rental demands by housing product
- residential target market analysis of housing preferences
- demands for new product types; existing products; affordable housing; senior housing and missing housing products
- assessment of potential impacts on Township services associated with each housing type including utility and emergency services infrastructure.

The comprehensive residential market study is completed. An analysis of conventional supply and demand variables was conducted. In addition, LandUseUSA utilized an innovative approach to understanding total in-migration and out-migration within the Township and within Oakland County including assessing movership rates of renters and owners within the Township and the lifestyle preferences of migrating households to gain an understanding of the housing market, including current and projected housing needs.

The study also included measuring the market potential for attainably-priced choices; urban housing formats that might be missing from the current market, such as attached townhouses and row houses; and identification of urban formats that may be appropriate for mixed-use projects, such as lofts above street-front retail. Finally, the study also intended to identify the magnitude and market need for the different housing formats including continuing care housing formats.

The study has identified areas of market opportunities, areas where the market is saturated, and areas where housing products are completely missing. The Township's land use and housing policies should be updated, including updating the Township Master Land Use Plan and amending the Zoning Ordinance with sustainable contemporary land use and housing policies that will promote diversity in housing stock, support economic development, and result in sustainable growth to implement the Township's vision of West Bloomfield as a timeless community.

The Residential Market Study and Target Market Analysis EXECUTIVE SUMMARY includes the following subsections; and this is followed by a LEADERSHIP ADVISORY REPORT and a DEVELOPER ADVISORY REPORT. Here is a complete outline of the report contents:

EXECUTIVE SUMMARY

- A. Market Supply and Demand
- B. Market Gaps and Potential
- C. Missing Housing Formats
- D. Real Estate Analysis
- E. Target Market Analysis
- F. Target Market Profiles
- G. Contract or Cash (Net) Rents
- H. Continuing Care Facilities

LEADERSHIP ADVISORY REPORT

DEVELOPER ADVISORY REPORT

THE EXECUTIVE SUMMARY

A. MARKET SUPPLY AND DEMAND

The Flawed Approach to Supply and Demand – Conventional approaches to housing studies involve direct comparisons of supply and demand within the existing local market. A straight-forward and direct comparison of supply and demand is made to measure the gaps. In other words, $\text{Gap} = (\text{Demand}) - (\text{Supply})$. In this model, demand is traditionally based on the attributes of households currently living within the market – even if they are settled and disinclined to move.

Conventional supply-demand models are flawed because they rely on the assumption that the form and style of current supply is a good indicator of what new buyers and renters will want. In other words, they assume that Developers have accurately gauged market preferences and that what is built (and sold or rented) is an accurate reflection of what households want, and will continue to want.

This approach is advocated by lending institutions, which often require local market comparables as evidence of a proposed project's appropriateness for the existing market. Unfortunately, it fails to consider that residents would make other choices *if* they were available. Following this approach can also contribute to redundancy in the housing market, and blandness between neighborhoods throughout the market.

With this perspective, the housing study for West Bloomfield Township does include data typically used in the conventional approach to supply and demand and gap analyses, however, applies a more comprehensive approach to understanding total in-migration and out-migration to capture a more accurate reflection of the current and projected housing needs. Industry-accepted methodologies, data sources, and models have been applied in the work, with some geographic comparisons between the Township, Oakland County, and the State of Michigan.

Demand: Population and Households – West Bloomfield Township is slowly growing in total population and households. Based on the 2016 and 2017 American Community Survey (5-year and 1-year estimates), the Township is approaching 65,800 residents and has about 24,600 households. The average household size is about 2.7 persons, with little change in the past decade.

Demand: Households by Tenure – Across Oakland County, about thirty percent (30%) of all households are renters and they are gaining in their share of the total over time. In comparison, only twenty percent (20%) of West Bloomfield Township's households are renters, with little change over time. Oakland County should be viewed as a reasonable standard, and the comparison suggests that West Bloomfield Township is falling behind in its ability to attract renters with diverse incomes and lifestyle preferences for attached housing formats in urban places.

Demand: Income by Tenure – Owner households almost always have higher incomes than renters, and West Bloomfield is no exception. Compared to Oakland County averages, the Township has an exceptionally high share (33% v. 22%) of owner households earning one-hundred and fifty thousand dollars (\$150,000) or more. It also has a higher share (56% v. 40%) of renters earning fifty thousand dollars (\$50,000) or more.

Supply: Owner-Occupied Housing Values – In West Bloomfield Township, seventy percent (70%) of the owner-occupied housing units are priced above county averages. There is a need to provide more attainable prices, and particularly in the one-hundred and fifty thousand dollar (\$150,000) to two-hundred thousand dollar (\$200,000) value bracket. Any projects involving infill on single lots, rebuilds, or cottages arranged around courtyards should focus on smaller footprints and for-sale prices no higher than two-hundred thousand dollars (\$200,000).

Supply: Renter-Occupied Contract Rents – Affluent renters in the Township can certainly support market rate rents that are higher than averages for Oakland County. Regardless, the local market is currently over-priced. In fact seventy-eight percent (78%) of all for-lease choices in the Township are already priced at one-thousand dollars (\$1,000) or more per month. New choices are needed among attainably priced one-bedroom lofts with rents of one-thousand dollars (\$1,000) or less. The typical size would be 800 square feet or less.

Smaller units are also supportable, and micro-units could be as small as 400 to 450 square feet. This would typically be a carriage-style loft above a garage, guest suite expanded onto an existing house, or micro-loft above street-front retail. Rents could be as low as seven-hundred and forty-five dollars (\$745) per month for the smallest units; and they probably would qualify as “affordable” by HUD standards. NOTE: These observations are consistent with the findings of the Target Market Analysis.

In-Migration and Out-Migration – This study also includes a geographic comparison of the sources of in-migration into Oakland County and the destinations of out-migration. In general, most households moving into and from the county stay close to home. Macomb County is the biggest contributor of in-migration into West Bloomfield Township and it benefits the most from out-migration.

Migration from Other Countries – Although West Bloomfield Township is homogeneous with an over-prevalence of affluent home owners settled in detached houses, it is culturally diverse. It has, among other cultural populations, a large Jewish population, Chaldean population, and the third largest Japanese national population in the State of Michigan. With this diversity in mind, the housing study includes a comparison of total in-migration and out-migration from other countries. In-migration from other countries has fallen off sharply since the Great Recession; whereas out-migration has continued and is steadily out-pacing in-migration. This information has no direct bearing on the study results, and is intended only to inform the Township on the need for continued diversification. Again, this can be partially achieved by providing affordably-priced, for-lease units in missing building formats like townhouses and lofts.

See Exhibits in Section G

B. MARKET GAPS AND POTENTIAL

Market-Wide Gaps – Within West Bloomfield’s housing market, there are sufficient detached houses to meet the needs of new households seeking choices to buy that building format. Out-migrating households will sell their houses to in-migrating households and existing home owners will also shuffle between existing houses. There is no need to build more choices to accommodate in-migrating households seeking to buy houses.

Market Potential - In contrast, there is a pronounced gap and community need for attached for-lease alternatives, particularly among buildings with five (5) or more units in the structure. Migrating households of all ages and incomes are seeking attainably-priced townhouses and lofts that are available for-lease rather than for-sale. There is a specific need to introduce more attached housing formats in the Southeast Quadrant, especially near the Township Center at the intersection of Orchard Lake and Maple Roads.

Market Potential Township-Wide – Based on the total number of new households moving into West Bloomfield Township, there is a market-wide capacity to add at least one-hundred and sixty (160) new-build units in missing and attached building formats annually and over the next five (5) years under a conservative approach. NOTE: If a more aggressive approach is implemented this figure could be increased to no more than 385 new units annually. However, the aggressive approach includes risks, including higher vacancy rates, slower absorption rates, and lower rents.

Market Potential by Quadrant – Using a conservative approach, there is a market potential for ten (10) new units annually in the Northwest Quadrant; one-hundred (100) new units in the Southwest Quadrant; and fifty (50) new units in the Southeast Quadrant, for a total of one-hundred and sixty (160) units per year. The units in the Northwest Quadrant may be concentrated around and near the lakes, ideally across the street from detached, lakefront houses. Units in the Southwest Quadrant may be allocated throughout the quadrant area. Units introduced into the Southeast Quadrant should be attached housing formats and be concentrated in and near the Township Center District.

Market Potential by Tenure – Over the next five years, all new-build housing units should be designed and built for rental, rather than ownership. This recommendation is intended to provide balance in the lease/own housing stock and address the pent-up demand for attached for-lease choices. It is also recommended that the Township ensure that the Township’s few redevelopment sites, with the exception of single lots, be developed into missing housing formats, rather than being subdivided into more detached houses for affluent owners.

In the event Developers continue proposing detached houses and if those formats are approved on tracts of land larger than a single lot, then land will be lost to development opportunities for other missing formats that are in demand and the community will become increasingly homogenous with the prevalence of detached houses that are attainable only to affluent home buyers. The Township will lose the opportunity to promote diversity in housing stock, support economic development, and achieve sustainable growth to implement the Township’s vision of West Bloomfield as a timeless community. Therefore, it is recommended that development be encouraged for attainably priced choices for low and moderate income households and workers.

Potential for Infill – There are opportunities for the development of new, owner-occupied, detached houses under the following circumstances:: a) replacing houses that are lost to fires or other disasters; or b) infill on single-unit vacant lot that is adjacent to existing detached houses, or the lot is located within a neighborhood comprised entirely of detached houses. In fill should be applied only in the circumstances listed above.

Conservative v. Aggressive Approach – The annual market potential of one-hundred and sixty (160) attached units for West Bloomfield Township is a conservative approach, and is the recommended annual goal, which can be pursued each year over the next five (5) years. This conservative approach is based on in-migration into the Township, and is unadjusted for out-migration. It does not include households that are already living in and moving within the Township.

An aggressive approach represents a maximum or not-to-exceed threshold based on current migration patterns both into and within West Bloomfield Township, and unadjusted for out-migration. It assumes that every household moving within the Township would prefer to trade-up into a fully refurbished or remodeled unit, rather than simply shuffle between outdated units. The aggressive approach suggests a maximum market potential of three-hundred and eighty-five (385) refurbished units including new for-lease units in attached formats. This is 2.4 times higher than the conservative approach. More realistic is the conservative approach which indicates a market potential of up to one-hundred and sixty (160) new-builds annually (namely townhouses and lofts); whereas the aggressive approach would support an additional 225 rehabs, remodels, or upgrades to existing units could be supported ($160 + 225 = 335$) per year.

See Exhibits in Section A and Section B

C. MISSING HOUSING FORMATS

Missing Middle Housing – West Bloomfield Township has a limited amount of undeveloped land remaining, but there are good opportunities for urban infill along some corridors, and redevelopment of underutilized land. Housing development in West Bloomfield has traditionally been focused on detached houses, with the newest choices being conventional formats that typically do not appeal to diverse target markets migrating throughout Oakland County.

Townhouses and Lofts – Moderate and low-income households tend to have higher movership (migration) rates, and most are seeking attainably-priced attached units that are available for-lease. They are also seeking alternatives to conventional apartments, and they are gravitating toward urban that are walkable to community amenities, including dining, shopping, entertainment, lakefronts, and trails.

Migrating renters tend to be looking for townhouses or row houses integrated into mixed-use projects that include restaurants, retail, and entertainment venues. Many will also choose lofts above street-front retail, and/or integrated into urban town centers that include new restaurants, conveniences, and personal services. If detached houses are the only for-lease options, then they may accept that compromise or more likely will seek for-rent alternatives in other nearby communities.

Avoid Redundant Apartment Buildings – To be clear, the market potential for attached for-lease units in West Bloomfield Township should not be addressed by building more apartment buildings that are conventional in format and redundant to existing choices. Instead, new developments should include modern-day three-story, urban townhouses and lofts arranged around town squares, courtyards, or along commercial corridors, such as Orchard Lake Road. Consequently, ideal locations for townhouses and lofts include: a) commercial corridors; b) adjacent to established apartment buildings; c) transitional places between commercial areas and surrounding neighborhoods; and d) across the street from lakefront homes.

Recommended New Formats – It is recommended the Township encourage the following new housing formats:

- 1) Duplexes (side-by-side and stacked) – mansion-style houses
- 2) Triplex, Fourplex (side-by-side and stacked) – mansion-style houses
- 3) Fourplex, Sixplex (side-by-side and stacked) – townhouses with private entrances, patio homes
- 4) Three-level Twelve Plex Walkups (with courtyards) 3-story stacked lofts
- 5) Mixed-Use – lofts above retail or in mixed-use projects
- 6) Accessory Dwellings – guest suites or carriage units above garages

New housing formats should also incorporate the following design guidelines:

Side and Rear-Loaded Parking Only – The Township and Developers should be cautioned against building more attached townhouses or “condos” with protruding garages. Most existing townhouses and condos throughout the Township have front-loaded garages that dwarf the front of the housing unit and the front entrance.

This style is intended to optimize the interior living space of each unit, plus optimize the density within project. Unfortunately, protruding garages undermine the character and livability of neighborhoods. They tend to result in building designs that create social isolation while undermining the community environment and sense of place. Alternatives must be demanded by the Township. This can include driveways that lead to side-loaded garages, or alleys that enable rear-loaded garages. Another alternative is that a row of garages could be developed on the other side of a new alley or narrow street - *behind* the new townhouses or lofts.

Accessory Dwelling Units – The Township may consider new formats that include some accessory dwelling units (ADUs). ADU refers to suites added as expansions to existing houses, or carriage style lofts above garages. In Michigan, these formats are well received by renters seeking walkable access to lakefront amenities; views of the lakes; and even a lake breeze from a courtyard, balcony, or rooftop patio. The best locations include in established homes across the street from the lake, and any place that offers a second story view or breeze.

See Exhibits in Sections A and B

D. REAL ESTATE ANALYSIS

The real estate analysis includes a study of housing unit vacancies, seasonality, available choices, age of housing stock, and building permit activity over time. The study of these variables is used to gain perspective on local market trends. The results are also used to gauge the market potential by value and rent bracket.

Vacancy Rates – Including all seasonally-occupied units, West Bloomfield Township appears to have a high vacancy rate of about nineteen percent (19%), which is slightly higher than average for Oakland County. However, after adjusting for seasonally occupied units, this figure falls to just five percent (5%). For perspective, most markets across Michigan tend to strive for adjusted vacancy rates of six percent (6%) to eight percent (8%).

The number of seasonally occupied and vacant units in West Bloomfield Township has remained generally stable over time with minor fluctuations year-to-year. There were over two-hundred and eighty (280) seasonal and vacant units in 2017 and at the time of American Community Survey. This figure could be twice as large if accounting for seasonal units that were occupied during the survey. The two-hundred and eighty (280) units are also about fifteen percent (15%) lower than the peak level of three-hundred and forty (340) units reported in 2013.

For Sale vs. For Lease Choices – The analysis also includes a comparison of available for-sale and for-lease choices throughout West Bloomfield Township. Data has been gathered on values, contract rents, and unit sizes (square feet). Results have been used to demonstrate the relationships between prices and unit sizes; and to help verify market gaps and opportunities.

Moderate Home Values – West Bloomfield is an affluent market and its home values are higher than statewide averages. Although high, local home values are significantly lower than Birmingham, and on-par with other places in Oakland County. As expected, there is a direct relationship between home values and rents relative to the unit size in square feet.

Price in Perspective – In West Bloomfield Township, an existing 1,300 square foot house might be available for two-hundred thousand dollars (\$200,000); a 2,000 square foot house might have a price approaching four-hundred thousand dollars (\$400,000); and a 3,000 square foot house could command a price of five-hundred thousand dollars (\$500,000). Although pricey by most standards, these figures are nevertheless much lower than the prices in the City of Birmingham, where existing houses with 2,000 square feet of space or more will capture a price of at least eight-hundred thousand dollars (\$800,000).

Cottages on Courtyards – Based on analytic results, LandUseUSA does not recommend the proactive development of detached houses in significant numbers. However, there does appear to be an absence of choices among small houses that have 950 to 1,200 square feet. In carefully selected locations, a small number of cottages might be supportable and moderately priced at two-hundred thousand dollars (\$200,000) or less. The ideal cottage project would be located in a place that is walkable to lakefront amenities.

Generous Apartment Sizes – Based on the study of existing for-lease choices, the smallest apartments in West Bloomfield appear to have at least 750 square feet, and there are many choices with up to 1,400 square feet. There is a need for small one and two-bedroom lofts with open floor plans and less than 800 square feet. Small lofts might have a minimum of 550 square feet; and some accessory dwelling units are sometimes even smaller.

Building Permit Activity – Based on data reported by the Census Bureau and American Community Survey (ACS), there appears to be a dearth of activity among attached housing formats. The one exception is the new Town Court Apartments under construction along Orchard Lake Road, which will add one-hundred and ninety-two (192) new apartments. Although this will help meet some of the need, other developments are needed to introduce for-lease townhouses and lofts.

Comparison to Oakland County – Building Permit data for Oakland County is studied to demonstrate the differences between activity among detached and attached housing formats, and the differences in average investment per unit. For Oakland County overall, thirty-five (35) new attached units are being built for every one-hundred (100) new detached houses.

West Bloomfield Township is not keeping pace with the local trend. 2018 was the first year that any measureable number of approved building permits were reported among attached units in the Township. Specifically, 192 attached units were approved in that year. In comparison, over 3,000 attached units have been developed in other parts of Oakland County and since 2013.

Regardless of the year, throughout Oakland County, the average investment into an attached unit is half that of detached houses. This relationship is important for developers to consider when seeking ways to manage construction costs and maximize profits.

[See Exhibits in Section E](#)

E. TARGET MARKET ANALYSIS

The Target Market Analysis uses data based on definitions provided by Experian Decision Analytics, the vendor of demographic data used in this study. The data is categorized based on seventy-one (71) lifestyle clusters, referred to as Mosaics, living throughout the United States. Experian's definitions of these lifestyle clusters are based primarily on a) geographic region in the United States; b) household density; c) household income; d) tenure (owner and renter-occupancy); d) consumer behavior (credit and debt); and e) a wide variety of other socio-economic variables – of which ethnicity is just one factor.

Request for access to the Experian data portal can be accessed at the following URL: www.experian.com/marketing-services/mosaicportal.html

Data Sorted by Income – Experian Decision Analytics has assigned codes to the seventy-one (71) mosaic lifestyle clusters that are based on income, with the highest income cluster having a code of A01, and the lowest income cluster having a code of S71. The income rankings hold up in large geographies like states and most counties, but variances may appear in relatively small cities and villages.

Target Markets Based on Lifestyle Cluster – The first exhibit in Section C of this report serves as an introduction to the lifestyle clusters that migrate into and within Michigan and seek attached housing formats to lease in urban places. These lifestyle clusters represent the ideal target markets for Developers interested in building new choices in West Bloomfield Township.

Among the seventy-one (71) lifestyle clusters living across the nation, about thirteen (13) are most inclined to seek attached housing formats to lease in Michigan. The most predominant target lifestyle cluster is the Striving Singles target market, with 45,800 urbanites migrating into and within Michigan every year and seeking attached housing formats to rent. The Striving Singles have an assigned Experian Mosaic code of O54, which generally means that the households in this group take 54th place out of 71 on the basis of household income (A01 is generally the most affluent group and S71 is the poorest).

Other urban target markets, based on lifestyle cluster that will be most tolerant of market rate rents in West Bloomfield Township include, Family Troopers, Digital Dependents, Urban Ambition, Bohemian Groove, Full Steam Ahead, Wired for Success, Status Seeking Singles, Urban Edge, and Booming and Consuming. Target markets seeking relatively affordable choices in West Bloomfield include Hope for Tomorrow, Dare to Dream, and Striving Forward.

Most Prevalent Current Lifestyle Clusters – West Bloomfield Township is an affluent market and its established households tend to have relatively similar lifestyle preferences. The most prevalent current lifestyle clusters include American Royalty (A01), Silver Sophisticates (C13), Platinum Prosperity (A02), Generational Soup (B07), and Aging of Aquarius (C11). Collectively, these five groups represent over 12,000 households and nearly half of the Township's established households.

Affluent home owners tend to have very low movership rates, and West Bloomfield is no exception. The households listed above tend to be very settled into their upscale houses, and are disinclined to move. Those who do move will shuffle between houses within the market, or they move to another jurisdiction. The houses that they sell collectively meet the demands of other home buyers migrating into and within the Township.

Oakland County Perspective – The current profile of households living in Oakland County is more diverse than West Bloomfield Township overall. The County is attracting households that have relatively moderate incomes and who are seeking market rate rents among new attached housing formats. They are not necessarily low-income, but rather include upwardly-mobile, young professionals, and singles of all ages. Lifestyle cluster examples include Wired for Success (K37), Full Steam Ahead (O50), Digitally Dependent (O51), Urban Ambition (O52), and Striving Singles (O54).

Lifestyle Diversification – West Bloomfield's prevalent and settled lifestyle clusters are a sharp contrast to the profile of urban target markets with much higher movership rate. A direct comparison reveals a need to diversify the incomes and lifestyle attributes within the Township. Within the context of this study, this means diversification by income, tenure, urbanicity, and preference for building formats. These lifestyle preferences can span all cultures, languages, ethnicities, political affiliations, and religions.

[See Exhibits in Section C](#)

F. TARGET MARKET PROFILES

Identifying Target Markets – When lifestyle clusters are identified as candidates for attached formats in urban places, they become target markets for new units within the Missing Middle Housing typologies. They are selected based on their known propensity to choose attached housing formats in small and large urban places, communities, and/or downtown settings. They tend to be young singles and renters with high movership rates, but also include empty-nesters, early retirees, active seniors, and singles of all ages. The selection criteria is also described in the following list.

Rural and Prevalent Clusters – In relatively rural townships, small cities, and villages, the most prevalent lifestyle clusters are often settled into detached houses with low inclinations to choose other formats. Through their sheer numbers they might collectively generate a moderate market potential for attached units. However, targeting these households with new attached formats intrinsically comes with higher risk.

Movership Rates – The share of households that move each year is a critical variable in completing the Target Market Analysis. In most markets renters will almost always have lower incomes than owners. However, renters are also far more likely to move in any given year. Also, mature adults are more likely to be home owners. Once they settle, even renting seniors are disinclined to move again. Movership rates vary between Mosaic lifestyle clusters and target markets. There is also a direct relationship to tenure and income effects on movership rates.

Per Capita Income – In most markets across the nation, renters almost always have lower incomes than owners, and Michigan is no exception. Among all existing households migrating within the State, owners have a per capita income of sixty-five thousand dollars (\$65,000), whereas the renters have a per capita income of thirty thousand dollars (\$30,000). Among all new households migrating into the State, owners have a per capita income of forty thousand dollars (\$40,000), compared to twenty thousand dollars (\$20,000) for renters.

The distinction between incomes by tenure is important when testing the market tolerances for rents. Assuming that the average migrating renter should spend no more than thirty percent (30%) of its income on rent, this implies a market-rate average of seven hundred and fifty dollars (\$750) per capita. In comparison, new renters moving into the State are more likely to seek lower rents of five hundred dollars (\$500) per month. These are statewide averages intended only to provide some general perspective. Rents in West Bloomfield Township are discussed on page 12.

Household Behavior – The typical behaviors and lifestyle preferences of each lifestyle cluster has been studied based on averages for the group and across the nation. Each cluster has a unique profile based on their inclination to move (movership rate); buy a house versus rent; choose a newly built unit rather than a pre-existing one; tolerate mortgages or rents based on their income; choose detached houses versus attached formats; and live in an urban versus a relatively rural location.

Some Examples – To elaborate, “Platinum Prosperity” (A02) is the third most prevalent lifestyle cluster in West Bloomfield Township (see exhibits in Section B). Based on national averages reported by Experian, we know that ninety-five percent (95%) of the cluster’s households are owners; only three percent (3%) of those owners move in any given year, if they move at all, almost all will choose a house. In comparison, “Wired for Success” (K37) represents fewer households in the Township. However, seventy-nine percent (79%) are renters; ninety-two percent (92%) of this lifestyle cluster move every year; and eighty percent (80%) would choose an attached unit if it were available.

See Exhibits in Section D

G. CONTRACT OR CASH (NET) RENTS

HUD Income Limits – Based on standards established by the U.S. Department of Housing and Urban Development (HUD), the Area Median Income (AMI) for a four (4) person household is set at seventy-thousand and nine-hundred dollars (\$70,900) annually in the Detroit-Warren-Livonia HMFA, which is HUD's Metro Fair Market Area. For clarification, this geography includes Wayne, Macomb, St. Clair, Lapeer, and Oakland Counties; and neighboring Livingston County is a separate area. This translates into a median household income of nearly fifty-thousand dollars (\$50,000) for a one-person household; and about fifty-seven thousand dollars (\$57,000) for a two-person household.

For a typical one-person household that spends no more than thirty percent (30%) of its income on rent, the average market-rate rent could be one-thousand two-hundred and fifty dollars (\$1,250). For a low-income, one-person household earning eighty percent (80%) of AMI or less, the market rate rent should be no higher than one-thousand dollars (\$1,000) per month.

Price Tolerance – Some low-income households earning eighty percent (80%) of the Area Median Income or less might have a tolerance for higher rents in premium markets like West Bloomfield – especially if new for-lease units are introduced in missing formats. Assuming that a one-person household could actually tolerate spending up to forty-five (45%) of its annual income on contract rent, a maximum contract rent of one-thousand four hundred and ninety-five dollars (\$1,495) per month could be supported for West Bloomfield. NOTE: Ideally, low-income households should be spending no more than forty-five percent (45%) of their annual income on gross rents (including utilities) combined with the cost of transportation (car payments, fuel, parking, and/or public transit).

Affordable Housing – About forty percent (40%) to forty-five percent (45%) of the units could be developed for the affordable housing market; or about seventy (70) units annually. Affordable units should be targeted at households earning sixty percent (60%) to eighty percent (80%) of the Area Median Income (AMI) for one-person households, including singles of all ages. The market could support units with one-bedroom studios or one-bedroom lofts with 400 to 700 square feet of space, and contract rents of seven hundred dollars (\$745) to one-thousand and eighty five dollars (\$1,085) per month.

Market Rate Housing – At least fifty-five percent (55%) of the units could be developed for market rate housing and for households earning at least eighty percent (80%) of the Area Median Income (AMI). Contract rents should be based on the unit sizes and building location; and should not be based on the building format. The market could support units designed for one-person households (i.e., singles of all ages) with 700 to 1,000 square feet and contract rents in the range of nine-hundred and ninety-five dollars (\$995) to one-thousand four hundred and fifty dollars (\$1,450); and two-person households with 1,000 to 1,400 square feet and contract rents in the range of one-thousand two hundred and seventy-five dollars (\$1,275) to one-thousand six hundred and fifty-five dollars (\$1,655).

Larger Household Sizes – Very few rental units should be designed for three or four-person households. In West Bloomfield Township, larger households are likely to include two wage earners, plus at least one child. Based on their known lifestyle preferences, they are also inclined to seek detached houses available for purchase within the Township. These may include existing houses offered by out-migrating families, or a small number of infill houses on vacant single lots.

See Exhibits in Section A

H. CONTINUING CARE FACILITIES

National Nomenclature – Based on national standards for data reporting, Continuing Care Facilities includes two key components: 1) Residential Care Communities (RCC), including independent and assisted living with some memory care; and 2) Nursing Homes (NH), including rehabilitation; physical and occupational therapy; and specialized Alzheimer care. West Bloomfield Township is significantly over-saturated in the first subset, but not the second.

RCC Market Saturation – West Bloomfield is currently saturated with independent and assisted living facilities, collectively known as Residential Care Communities (RCC). It has a disproportionately high number of beds per capita relative to its population aged 65 years, 85 years, and better. Specifically, there are over ten (10) beds for every one-hundred (100) seniors over the age of 65 years; and fifty (50) beds for every one-hundred (100) elderly residents (85+ years). These figures are *twice* the average for Michigan and the nation.

Age-In-Place Hype – The concept of age-in-place housing is receiving much media coverage, particularly as census data demonstrates that Americans are living longer as seniors, while young adults are postponing marriage; postponing starting their own families; and having fewer children. These trends are being leveraged to develop (and sometimes over-develop) independent and assisted living communities in many markets.

Simply Put, Seniors are Settled – Although age-in-place housing is an attractive concept, the reality is that older adults have exceptionally low movership rates. As affluent home owners, West Bloomfield Township's seniors will be especially disinclined to change addresses. Empty nesters might seek to downsize, but most will still choose a smaller house over an apartment. Many are working and staying active later in life, and will resist moving into an apartment just because they are "seniors". Many will seek age-at-home solutions that enable them to remain in their existing house for as long as possible.

Age-in-Place Strategies – Meeting the needs of West Bloomfield's seniors should certainly be addressed. However, the ideal strategy is to focus on providing front door services direct to seniors and the elderly; plus assistance that enables them to remain in their current houses for the duration of their life. The focus should not be on building attached apartments for seniors to move into; or independent and assisted living facilities that serve the needs of surrounding jurisdictions.

Guest Suites, Accessory Dwellings – Alternative solutions for age-in-place housing can include subdividing existing mansions into an owner in the main house and a renter in the adjoining duplex. It can also include allowing expansions that add guest suites for single children, caregivers, or aging parents. Guest suites could also be added as new accessory dwelling units, built as attachments to existing houses (perhaps with breezeways), and in carriage-style suites above existing garages.

Michigan Perspective – Some statewide data has been studied to gain some understanding of trends among Continuing Care Facilities, including both Residential Care Communities (RCC), and Nursing Homes. In general, the data shows that over eighty percent (80%) of all RCCs in Michigan are for-profit operations. They are almost equally split between chains and independent operators.

Over eighty percent (80%) of all Continuing Care Communities in Michigan are Residential Care Communities (independent and assisted living communities); and less than twenty percent (20%) are Nursing Homes. This is disproportionately high compared to national averages (65% to 35% split).

Continuing Care is Expensive – The average monthly gross rent for residential care in Michigan is about three thousand eight-hundred and twenty-five dollars (\$3,825). This typically includes a one-bedroom apartment with all utilities; most if not all meals; an hour or two of nurse assistance with daily needs; occupational therapy; and some group activities geared toward socialization, wellness and fitness, memory care, and continued learning. Prices can be two-to-three times higher a) in upscale markets; b) for larger apartments in the newest facilities; and/or c) for 24-hour nursing care.

See Exhibits in Section F

LEADERSHIP ADVISORY REPORT

Share the Housing Study Results. This housing study should be posted online at the Township's website and under its planning division. The Township's planning staff could also prepare verbal summaries that accurately reflect key findings and results of the study. Several inter-related examples are provided below.

1. *Residential Care Community Housing is Over-Built* - The market is currently over-built with independent and assisted living apartments. The Township is carrying more than its share of the load for the county and region. There may be a need and justification for a longer-term moratorium on these super-sized building formats.

2. *Detached Formats* - The current demand for detached houses is met, partly because established home owners have low movership rates and tend to be settled. There is a need to avoid over-building super-sized, detached houses for new households wanting to migrate into the Township.

3. *Attainably Priced Housing* - There is a need for attainably-priced, small houses on infill, single lots, with prices of \$200,000 or less. These could also be some cottages around shared courtyards. These formats should be offered in age-integrated and income-integrated neighborhoods, with community-wide access to family and senior services.

4. *Design* - Developments with sidewalks and side-loaded or rear-loaded garages are preferred, and garages could also be accessed from alleys or narrow streets. No more than six (6) units should be attached in any given townhouse type of structure, and every townhouse must have a private entrance, plus a porch, patio, and/or balcony. In addition, some twelve-plex structures may be developed with shared entrances, including four units on each of three levels. Each unit should be designed as a corner loft and with windows on two sides.

5. *Missing Formats* - There is a profound need for attainably-priced, income-integrated choices among attached, for-lease units. This means focusing on missing formats that are comparatively less expensive to build, such as townhouses, row houses, and lofts above street-front retail. This strategy can also help ensure that the existing supply of detached houses can be occupied by owners, instead of being subdivided for renters.

6. *Contract Rents* - There is a profound need for attainably-priced for-lease units with rents of one-thousand dollars (\$1,000) or less. These are likely to be one bedroom lofts with no more than 800 square feet. These units will help meet the needs of migrating singles seeking for-lease choices. They might bypass the Township altogether if the gap cannot be met. Intercepting them with new choices will help the Township diversify among lifestyle preferences – as well as culturally.

Financial Institutions – The Township staff and leadership could consider meeting with local financial institutions and ask them to offer low-interest loans and negotiable terms for developers that finance local projects in alignment with Missing Middle Housing formats. Personally ask the lenders to advertise the incentives, broadcast upcoming public meetings, and attend related events.

Hard and Soft Incentives – The Township could consider assembling a list of hard and soft incentives, and ensure that they are clearly conveyed on local websites. Hard incentives may include special loans from lenders, investment partnerships with non-profit organizations, etc. Soft incentives may include flexible terms, infrastructure improvements, brownfield remediation, collaborative marketing, streamlined review and approval processes, educational seminars with state agencies and associations, etc.

Update the Master Plan - The 2010 Master Plan and Zoning Ordinance (including density limits) must be updated and revised to ensure that the development of missing middle housing formats are allowed. Address topics like minimum lot sizes, parking ratios, densities, building heights, build-to lines, porches, balconies, and garage placements; and streamlined review and approval processes.

Township Center Overlay District - Incorporate form-based language that encourages urban building formats (attached v. detached), rather than use-based designations (multi-family v. single-family). Streamline the permit review process as much as possible; and offering bonuses for urban formats, pedestrian amenities, contributions to placemaking, and enhancement of the public realm.

Media Outreach – Write media releases and event invitations internally, and then ask the media to print them as written. Writing media releases internally can help ensure thorough and accurate coverage of the master planning process, housing study results, community-wide goals and objectives, moratoriums, stakeholder engagement processes, and successes.

State Agency Collaboration – Initiate dialogues with the Michigan Economic Development Corporation, Michigan State Housing Development Authority, and Michigan Municipal League. Research and tap into their technical assistance programs; have discussions with key staff (such as RRC managers and CATeam members); attend conferences; and then inform the local investment community on statewide trends and initiatives.

State of Michigan Organizations, Associations, and Programs - 2019

Title	Acronym
<u>Michigan Talent and Economic Development</u>	TED
Michigan Economic Development Corporation	MEDC
Community Development Division MEDC	CD
Michigan Community Action Team MEDC	CATeam
Project Rising Tide MEDC	PRT
Redevelopment Ready Communities Program MEDC	RRC
Redevelopment Ready Sites Fellowship Program MEDC	RRC
Michigan Main Street Center MEDC	MMSC
Detroit Metro Prosperity Region 10	PR-10
Michigan Land Bank Fast Track Authority	MLBFTA

State of Michigan Organizations, Associations, and Programs – 2019 (continued)

Title	Acronym
<u>Michigan Municipal League</u>	MML
PlacePlans Program MML	PlacePlans
Great Places Program - Redevelopment Ready Sites	MML
<u>Michigan State Housing Development Authority</u>	MSHDA
Technical Assistance Programs MSHDA	TA
Building Michigan Communities Conference MSHDA	BMCC
<u>The State of Michigan – Other Associations</u>	Acronym
Community Economic Development Assoc. of Michigan	CEDAM
Michigan Association of Counties	MAC
Michigan Association of Planning	MAP
Michigan Community Development Association	MCDA
Michigan Downtown Association	MDA
Michigan Economic Developers Association	MEDA
Urban Land Institute Michigan Chapter	MI-ULI
The Congress of the New Urbanism Michigan Chapter	MI-CNU
27 th Congress for the New Urbanism - Louisville	CNU 27.Louisville
Michigan Local Government Managers Association	MLGMA
International Council of Shopping Centers	ICSC
Incremental Development Alliance	IncDev

DEVELOPER ADVISORY REPORT

Discovery and Research – Read the complete study. Contact the Township Planning Department or LandUseUSA with questions or concerns regarding the study results, findings, conclusions, and recommendations. It is recommended that developers propose new projects that align with the recommendations for attached, for-lease units, and in missing building formats.

Public-Private Partnerships – Engage Township planning staff early rather than later; have frequent discussions that help facilitate collaboration; and explore opportunities for public-private partnerships.

Senior Housing Complexes – Re-evaluate existing development sites and consider alternatives to senior independent and assisted living communities which are currently overbuilt based on beds per population 65+ years of age. There is a more profound need and larger market potential for missing middle housing formats like townhouses and row houses.

Mixed-Income Projects – Strive for attached units that are targeted at migrating single renters of all ages, with a range of incomes. Corner units with the best views can be priced at market rates and above; whereas inside units with alley views can be "attainably" priced for singles with relatively moderate incomes.

Site-Specific Market Studies – This Target Market Analysis is not a substitute for a site-specific studies and pro-forma analyses, which are essential for underwriting purposes and to qualify for loans, grants, tax rebates, or other incentive programs. Each new project's success will depend on a wide variety of site-specific attributes, including location, building placement, adjacent uses, visibility, access and egress, project amenities, management, and marketing.

Pro-Forma Analyses – Developers will inevitably and unavoidably need to prepare site-specific pro forma analyses for underwriting purposes and to qualify for loans, grants, tax rebates, or other incentive programs. Underwriting requirements will probably include specification on the following: a) building format, size, scale, height, mix of uses, and amenities; b) unit sizes, tenures, prices, and amenities; c) parking, access, and related impacts on infrastructure; d) ownership, zoning, land use regulations, and related planning implications; e) taxes revenues and related fiscal impacts; and f) labor, materials, taxes and fees, and related costs.

Form-Based Branding – Assuming that the urban transect and missing middle housing typologies are used as guides, product types recommended in this Target Market Analysis may be refined by Developers and Builders, and to fit the appropriate context of place.

Avoid labeling projects as "multi-family", "market rate", or "senior" housing. Instead, follow a form-based typology like "lofts", "condos", "townhouses", "row houses", and "waterfront". For example, consider "attached waterfront townhouses for-lease" instead of "multi-family apartments for-rent". Projects should be described according to their format and function, which will help diversify developer risk, optimize the market potential, and support socio-economic diversity within the community. A few qualifiers are listed on the following page.

Form-Based Approach to Project Branding includes:

- Use: residential, mixed-use; live/work; above retail, civic, and/or office space.
- Tenure: renter-occupied, for-lease, owner-occupied, lease-to-own, and mixed tenures.
- Scale: building height, footprint, number of levels, total units, units along building sides.
- Format: detached units, mansion style houses (comprised of duplexes and triplexes), cottage courts, and accessory dwelling units (not “single-family”).
- Format: attached formats like townhouses, row houses, multiplexes, walk-ups, low-rises, and flats and lofts (not “multi-family”).

End of Final Report

Table of Contents

Attachments

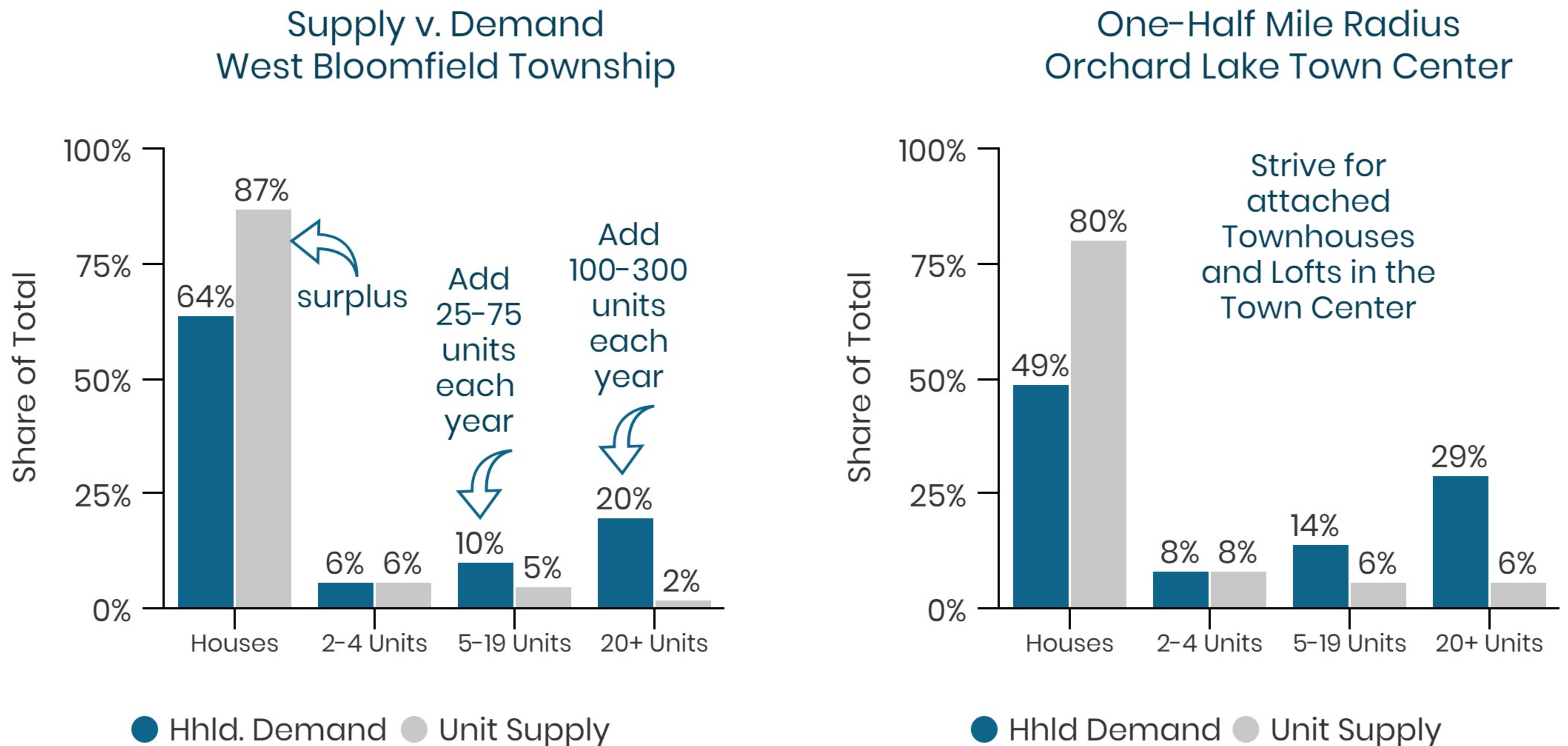
Summary & Next Steps	Section A
Missing Housing Formats	Section B
Mosaic Lifestyle Clusters	Section C
Target Market Profiles	Section D
Real Estate Analysis	Section E
Continuing Care Facilities	Section F
Market Supply and Demand	Section G
Economic Assessment	Section H

Section A

Summary & Next Steps

Demand v. Supply | West Bloomfield

A comparison of household demand and existing supply by building size.



Observations: Demand as shown in these charts is derived from the migration patterns of households moving into and within each respective geography, aligned with their known inclination to choose various building sizes (based on national averages).

Across all of West Bloomfield Township and as a blended average, only 13% of the existing housing units are attached, whereas over 26% of all migrating households would choose attached units if they were available. This indicates a significant "mismatch" between building formats and lifestyle preferences.

Existing residents and new households have different movership rates and expectations. In general, there is a surplus of detached houses; adequate supply of duplexes and four-plexes; and not enough choices in larger buildings with at least 10 unit.

Additional analyses completed as part of this same housing study indicate a market saturation among apartments targeted at seniors inclined to choose independent and assisted living communities. For seniors 65 years of age and better, the number of beds per capita vastly exceed averages for the region, state, and nation. Therefore, the results shown on this infographic must not be used to support or defend the development of additional senior housing communities over the next five years.

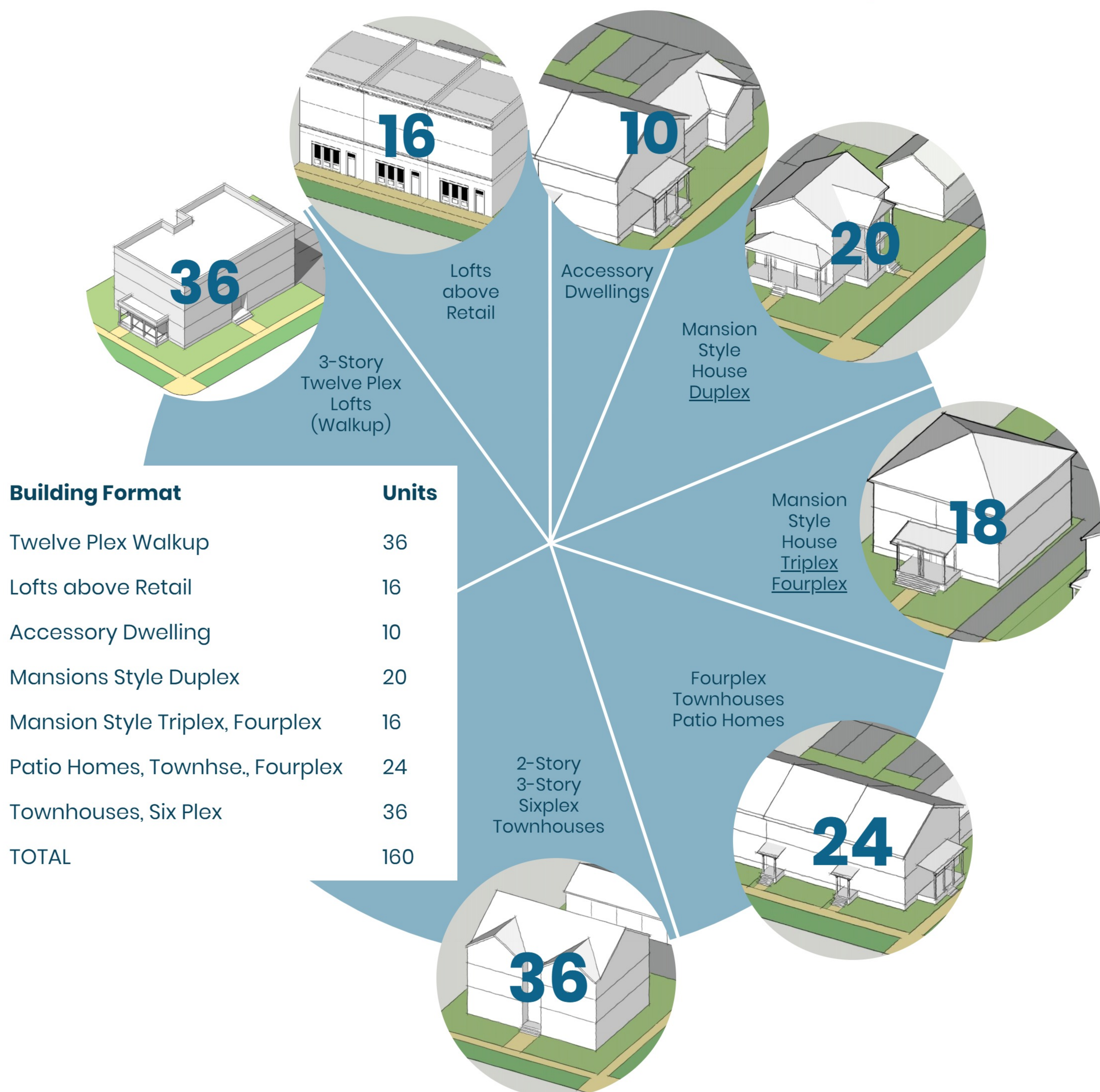


Underlying data generated by the supply-demand and target market analysis models; 2017 data. Analysis and exhibit prepared by LandUseUSA on behalf of West Bloomfield Township, Oct. 2018.

Annual Market Potential | New Builds Only

For-Lease Units | Missing Housing Formats

West Bloomfield Township

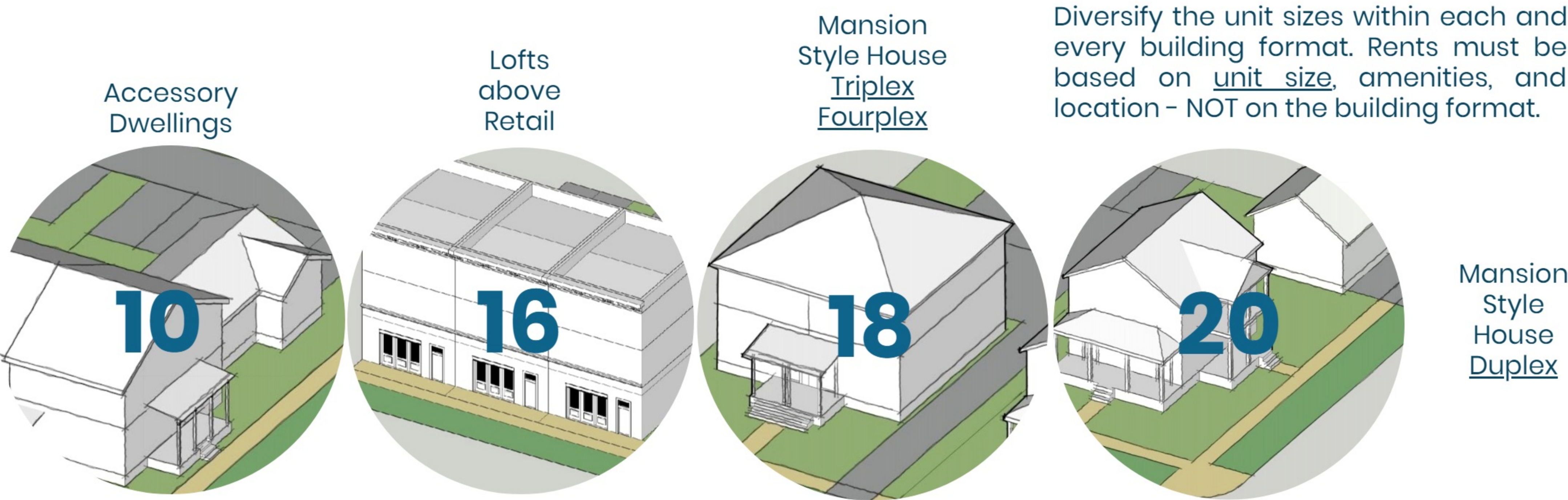


Annual Market Potential | New Builds Only

For-Lease Units | Missing Housing Formats

West Bloomfield Township

Diversify the unit sizes within each and every building format. Rents must be based on unit size, amenities, and location - NOT on the building format.



KEY

➔

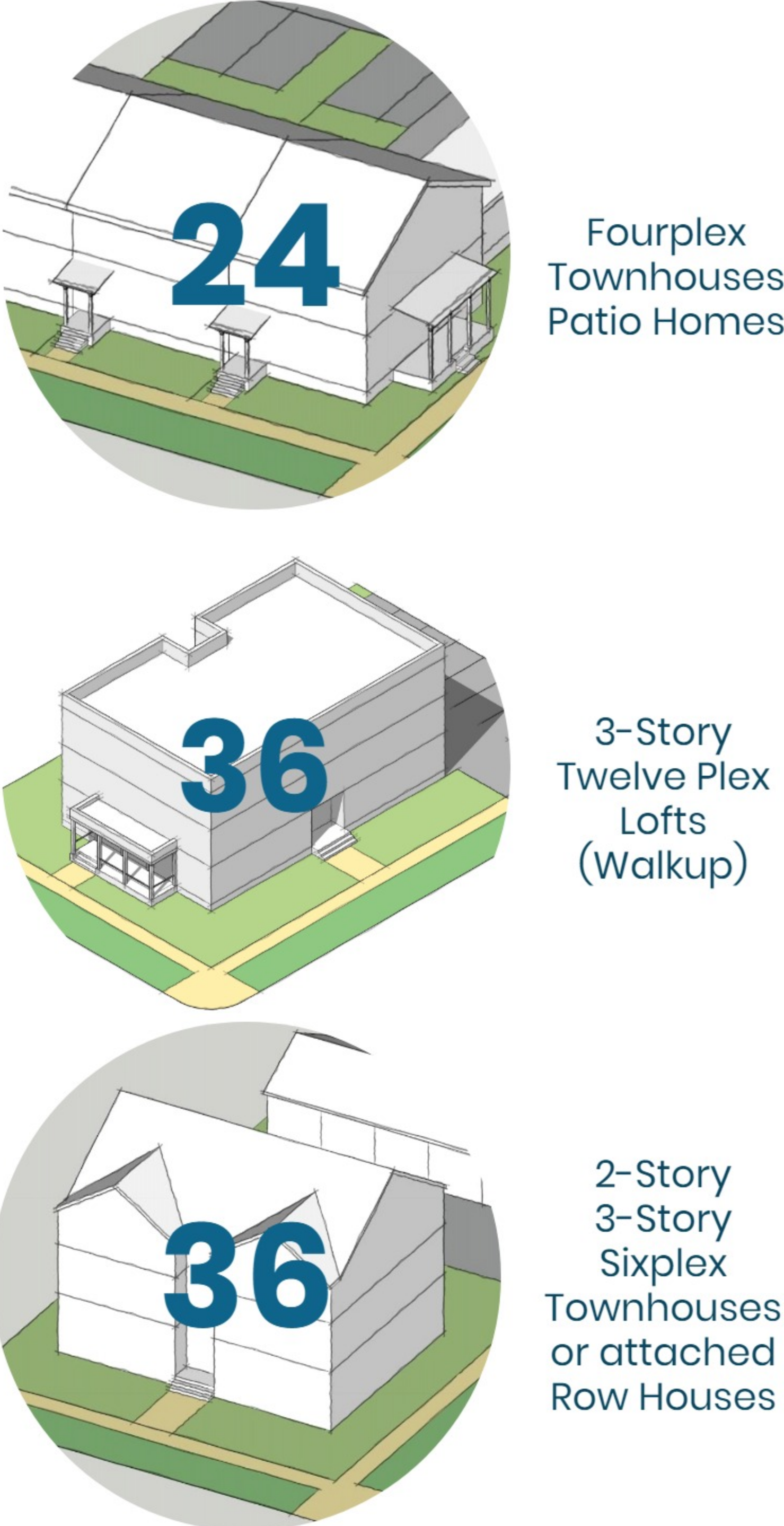
LMI = HUD's Low to Moderate Income limits, 2018. 80%+ is market rate; and <80% is low-income.

Size = Numbers of Persons, aligned with HUD limits.

Units = Annual Market Potential for New-Builds Only.

Rent range is based on 30% to 35% of income limit.

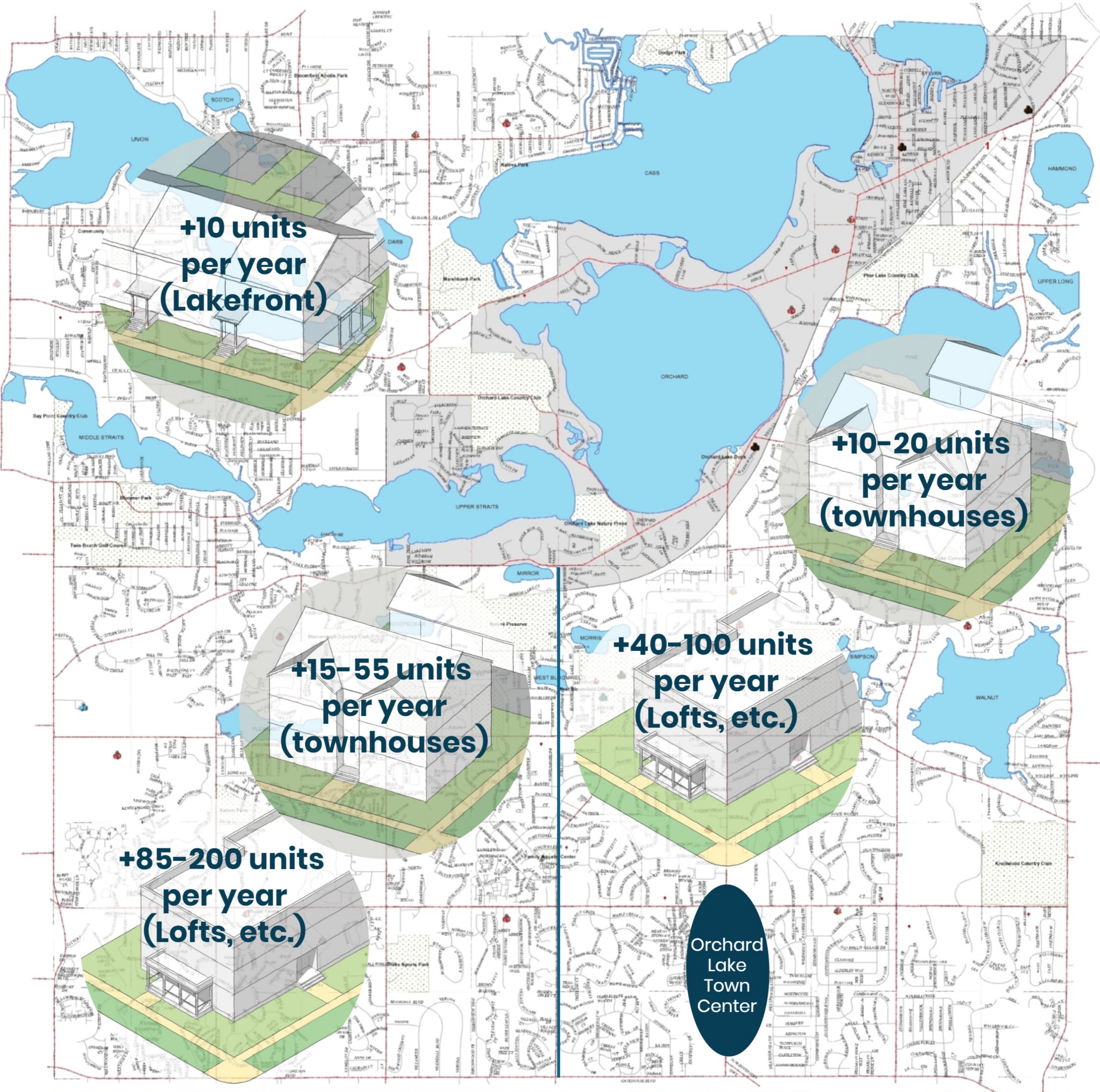
LMI	Size	Cash Rent	Sq. Ft.	Units
60%	1	\$745-\$870	400-450	20
65%	1	\$805-\$940	450-500	20
70%	1	\$870-\$1,015	500-600	15
75%	1	\$930-\$1,085	600-700	15
80%	1	\$995-\$1,160	700-800	15
90%	1	\$1,115-\$1,300	800-900	10
100%	1	\$1,240-\$1,450	900-1,000	10
90%	2	\$1,275-\$1,490	1,000-1,100	10
93%	2	\$1,320-\$1,540	1,100-1,200	10
96%	2	\$1,360-\$1,590	1,200-1,300	10
100%	2	\$1,420-\$1,655	1,300-1,400	10
90%	3	\$1,435-\$1,675	1,400-1,500	5
95%	3	\$1,515-\$1,770	1,500-1,600	5
100%	3	\$1,595-\$1,860	1,600-1,700	2
96%	4	\$1,700-\$1,950	1,700-1,800	1
98%	4	\$1,735-\$1,975	1,900-2,000	1
100%	4	\$1,775-\$2,000	2,000+	1
TOTAL				160



Numbers indicate the Annual Market Potential for New Builds

Annual Potential, New-Builds | West Bloomfield

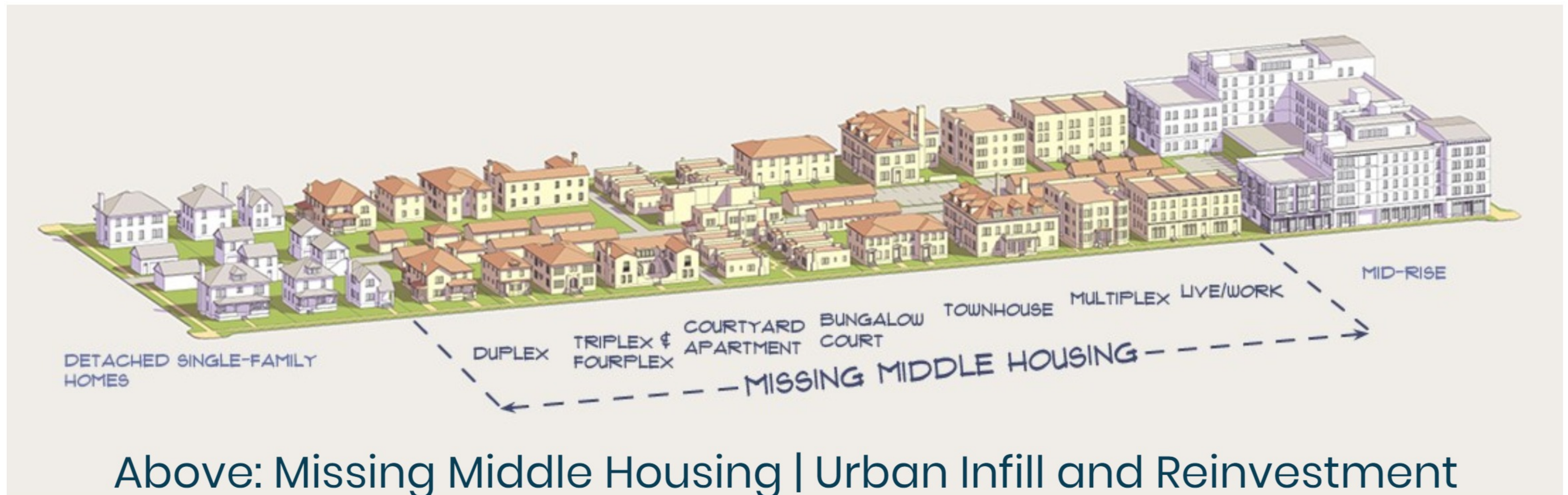
Market potential for new attached units in missing formats for three subareas.



Underlying data generated by the supply-demand and target market analysis models; 2017 data.
Analysis and exhibit prepared by LandUseUSA on behalf of West Bloomfield Township, 2018.

Missing Middle Housing

A typology of urban building formats being sought by migrating households.

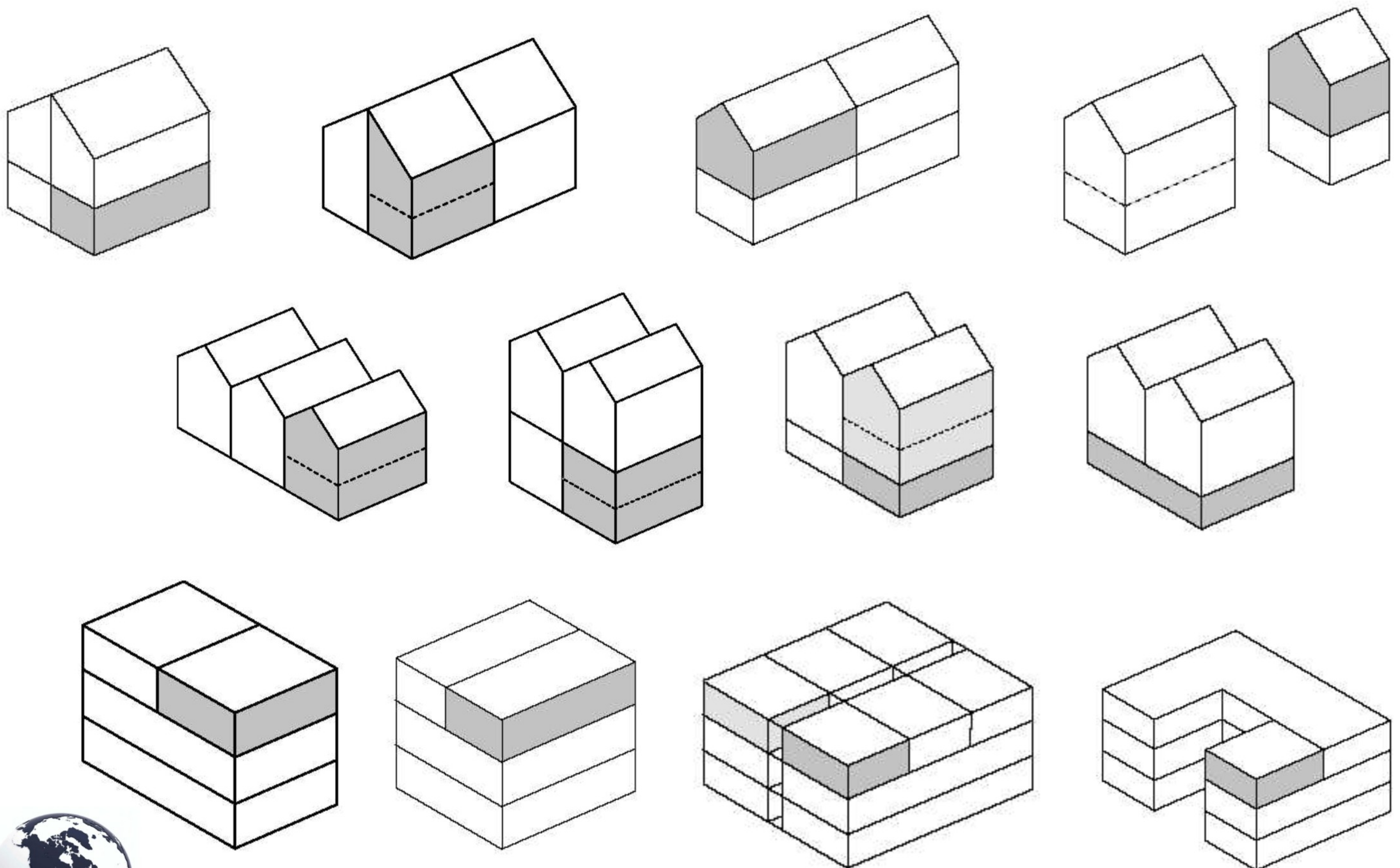


Above: Missing Middle Housing | Urban Infill and Reinvestment

Source: Dan Parolek and Opticos Design Group

Below: Building Blocks for Diverse Unit Sizes Across All Formats

Developers should diversify the unit sizes within each and every new attached building format. Rents must not be assigned based on the building format. Rather, they must reflect the unit size first (square feet and number of bedrooms and bathrooms); unique building and unit amenities; and the location with walkability and convenient access to shopping, eateries, and other community amenities.



LandUseUSA
UrbanStrategies

Exhibit prepared by LandUseUSA, LLC with permission from the contributors, 2018.

Implementation Plan | List of Suggested Improvements
West Bloomfield Township, Michigan

Updated
02/07/19

count check Township - Planning for Great Neighborhoods

- 1 ☐ Issue an RFQ and then an RFP for a town planner to update the Master Plan, Zoning Ordinance, and project approval process.
- 2 ☐ Expand items that the township planning staff is authorized to make decisions on, without waiting for a planning commission meeting.
- 3 ☐ Within the plan and ordinance, clarify the intents of "density" and explain that it is ideally balanced with preservation of the public realm.
- 4 ☐ Within the zoning ordinance, ensure that accessory dwelling units are allowed, such as guest suites or carriage-style lofts above garages.
- 5 ☐ Throughout the township, encourage the development of attached units that include private entrances and garages for 60% of the units.
- 6 ☐ Within the plan and/or ordinance, prevent future development of front-loaded or protruding garages, with some minor exceptions by place.
- 7 ☐ Within the plan and/or ordinance, identify locations where all new developments could ideally include alleys with rear-loaded garages.
- 8 ☐ Ask for Fiscal Impact Studies for some proposed uses, addressing school enrollment, traffic volumes, public services, and revenues.
- 9 ☐ Throughout the township, encourage new projects with attached housing to include sidewalks, courtyards, stoops, patios, and/or balconies.
- 10 ☐ Throughout the township, encourage new projects with attached housing to have the parking placed at the rear of the building - not in front.
- 11 ☐ Retain a professional town planner to review the 2017 Amended Zoning Ordinance, and suggest revisions based on this Implementation Plan.
- 12 ☐ Allow refinement to these suggestions by professional town planners with the appropriate qualifications, credentials, and expertise.
- 13 ☐ Deputize and authorize planning staff to refine the suggestions listed in this Implementation Plan, as needed to continue with the progress.

Implementation Plan | List of Suggested Improvements
West Bloomfield Township, Michigan

Updated
02/07/19

count check Town Center - Planning for a Great Place

- 1 ☐ Issue an RFQ and then an RFP for another (other) town planner to design a discrete Sub Area, Corridor, or District Plan for the Town Center.
- 2 ☐ Integrate the Brand, Design, and Character goals; plus the Design Study/Zoning Framework into the new Sub Area, Corridor, or District Plan.
- 3 ☐ Consider retaining a town planner to determine whether it is appropriate to establish a TIF District or Corridor Improvement Authority (CIA).
- 4 ☐ Consider retaining a town planning firm that can also write a form-based code (or hybrid) for the TIF District, CID, or Overlay District.
- 5 ☐ Within the Town Center Plan, clearly identify the priority development areas, pivoting at 14 Mile Road (south end) and Maple Road (north).
- 6 ☐ Collaborate with Oakland County on preparation of a detailed Transportation Improvement Plan for the Orchard Lake Road corridor.
- 7 ☐ At Maple and 14 Mile Roads, add monument signs, landscaping, and other features that effectively create a Gateway into the Town Center.
- 8 ☐ To address existing deep set-backs, consider slip-streets that include angle parking in front of new mixed-use projects, and fewer curb-cuts.
- 9 ☐ In the zoning ordinance, revisit height & density maximums, plus lot size minimums that might impede development of a compact, urban place.
- 10 ☐ Instead of parking minimums, consider maximums that encourage shared parking. Allow for parking decks behind multi-story buildings.
- 11 ☐ Evaluate the 100' right of way on county-controlled Orchard Lake Road, and identify strategies for improving the pedestrian environment.
- 12 ☐ Identify traffic-calming strategies that slow traffic and help convey a safer environment for shoppers, pedestrians, and bicyclists.
- 13 ☐ If there are any public parking lots along Orchard Lake Road, then ensure that they are clearly marked and evident to vehicular traffic.
- 14 ☐ Consider commissioning a retail market strategy that identifies specific anchors for new mixed-use project in a town center format.

Implementation Plan | List of Suggested Improvements
West Bloomfield Township, Michigan

Updated
02/07/19

count check Town Center - Land Uses and Building Scale

- 1 ☐ Pursue development of two-level projects with missing housing formats, such as for-lease townhouses and lofts, perhaps above retail.
- 2 ☐ Pursue two-level projects to both sides of Orchard Lake Rd, such as English Gardens & Orchard Mall with harmonious projects.
- 3 ☐ Identify the ideal location for a new or relocated cinema, theater, playhouse, performing arts, and/or cultural arts center.
- 4 ☐ Identify the ideal location for a pavilion for a summer concerts and special events; plus a seasonal farmers market. Provide public restrooms.
- 5 ☐ Strive for the development of buildings that are at least two levels in scale and that embrace Orchard Lake Road with minimal setbacks.
- 6 ☐ Support development of a pedestrian-friendly environment with sidewalks, cross-walks, wayfinding, seating, and similar amenities.
- 7 ☐ Ensure that auto-oriented features such as drive-throughs are designed to be architecturally compatible with a Town Center character.
- 8 ☐ Design any detached or free-standing retail tenants and restaurants to include common or shared vehicular access, plus sidewalks.
- 9 ☐ Consistently use language and review projects based on merits for building format, and avoid terminology that excludes any age or income.
Avoid labeling or debating the merits of housing designed as "worker housing", "senior housing", "low-income housing", "luxury lofts", etc.
Instead, focus on townhouses, lofts, mixed use, and other missing housing formats designed for migrating singles of *all* ages and incomes.
Avoid labeling new projects as "single-family" or "multi-family", and instead focus on formats like "houses", "lofts", and "sixplexes".

count check Town Center - Incentives and Pro Formas

- 1 ☐ Identify, create, and promote incentives for development of mixed-use, multi-story projects with an urban design that supports a Town Center.
- 2 ☐ Retain a qualified town planner to determine whether a Tax Increment Financing (TIF) district could be established for the Town Center.
- 3 ☐ Attend conferences hosted by the MDA and Michigan Main Street Center, and focus on training for Tax Increment Financing tools.
- 4 ☐ Meet with local financial institutions like Huntington and PNC banks, ask them to work together to fund reinvestment into the Town Center.
- 5 ☐ Hard incentives may include special loans from lenders, investment partnerships with non-profit organizations, etc.
- 6 ☐ Soft incentives may include flexible terms, infrastructure improvements, brownfield remediation, and collaborative marketing.
- 7 ☐ Soft incentives might also include streamlined review and approval processes, educational seminars with state agencies & associations, etc.
- 8 ☐ Encourage property owners to attend pro forma training by the MEDC; and workshops provided by the Incremental Development Alliance.

Implementation Plan | List of Suggested Improvements
West Bloomfield Township, Michigan

Updated
02/07/19

count check Town Center - Public Private Partnerships, Collaboration

- 1 ☐ Collaborate with stakeholders on a Town Center Vision; clarify goals for creation of an enjoyable place for living, shopping, working, etc.
- 2 ☐ Collaborate with Farmington Hills to ensure that the Orchard Lake Road Corridor Plan aligns with their adjacent goals and objectives.
- 3 ☐ Collaborate with existing property owners on redevelopment of largest parcels at Orchard Lake & Maple Roads into mixed-use urban projects.
- 4 ☐ Proactively contact the owners/property managers for Orchard Mall Shopping Center, English Gardens, and Shoppes at Old Orchard.
- 5 ☐ Encourage councilmen and planning commissioners to review new projects with mindful listening, trust, flexibility, and collaborative spirit.
- 6 ☐ Actively seek good-will investors and angel foundations affiliated with major employers, anchor institutions, and diverse cultural communities.
- 7 ☐ Engage property owners, prospective investors, and developers in interviews, forums, workshops, and/or studios during the planning process.
- 8 ☐ Encourage developers, property owners, and investors to collaborate on joint projects to share skills, equity, debt, profits - and potential risks.
- 9 ☐ In email correspondence with developers, include direct URL links to the Master Plan, Zoning Ordinance, Signage Study, and Housing Study.
- 10 ☐ Retain a real estate broker to prepare one-page summaries on each available parcel, and post them on the township and chamber websites.
- 11 ☐ Identify retail gaps based on supply and demand, plus optimal retail anchors for new mixed-use project. Conduct outreach to those retailers.
- 12 ☐ Encourage property owners and developers to use the Housing Study as a platform plus conduct due diligence for their unique projects.
- 13 ☐ Contact the following property owners to explore opportunities for mixed-use projects with balanced scale on both side of Orchard Lake Rd.

Orchard Mall Shopping Center
NIA Mid-America Real Estate, Inc.
38500 Woodward Avenue, Ste 100
Bloomfield Hills, MI 48304

Daniel Stern, Managing Broker
dstern@midamericagr.com
(248) 855-6800

Jared Gell, CCIM, Vice President
jgell@midamericagr.com
(248) 855-6800 x110

Shoppes at Old Orchard
RPT Realty
6526 Orchard Lake Road
West Bloomfield, MI 48322

Rick Anthony, Leasing Agent
ranthony@rptrealty.com
(248) 592-6436

Carol Rutz, Property Mgr.
crutz@rptrealty.com
(248) 592.6528

English Gardens
English Gardens
6346 Orchard Lake Road; Ste 2017
West Bloomfield, MI 48322

Kevin Lowman, Special Projects Mgr.
klowman@englishgardens.com
(248) 851-7506

Bob Walker, B2B Development Mgr.
bwalker@englishgardens.com
(248) 396-7326

Implementation Plan | List of Suggested Improvements
West Bloomfield Township, Michigan

Updated
02/07/19

count check Marketing - Suggestions for Website Improvements

- 1 ☐ "Current projects" - This page is empty; consider combining it with "Planning Projects" to avoid giving the impression that nothing is underway.
- 2 ☐ "Searchable database of available properties" - URL link is broken and could easily be repaired. Follow up with regular testing of all links.
- 3 ☐ "Available Space" - Consider listing reinvestment opportunities directly on the Township's website to avoid diverting visitors to other sites.
- 4 ☐ "Available Space" - The Township could consider acquiring land and properties for reinvestment, and then marketing them on this site.
- 5 ☐ Consider creating a separate dedicated website for the West Bloomfield Town Center to promote all of its tenants and businesses.
- 6 ☐ "Things to Do" - Could be significantly improved with items like a farmers' market, theaters and cinemas, plus items listed on the next line below.
- 7 ☐ "Things to Do" - Consider moving these from "Community Information": swim, skate, parks & rec, golf, comm. centers, library, historical society.
- 8 ☐ "A Great Place to do Business" - Ready for an update, and reinvestment incentives could be added to help attract prospective developers.
- 9 ☐ "Planning and Zoning" - Consider replacing the rendering with photos of existing buildings that demonstrate the vision for the Town Center.

count check Marketing - Suggestions for Collaboration

- 1 ☐ Chamber of Commerce Membership - Collaborate on a merchant membership drive; consider offering first year discounts to new members.
- 2 ☐ Chamber of Commerce Website - Ask that "Grocery" stores and "Restaurants" be much easier to find in the membership listing.
- 3 ☐ Chamber of Commerce Website - Create and provide a simple map showing location of grocery stores, restaurants, and similar amenities.
- 4 ☐ There is a need to add many more Facebook followers and promote placemaking, shopping, events, and community assets - not just safety. Nearly 6,000 Facebook members have "Liked" West Bloomfield on Google - but less than 300 have found and "Liked" its Facebook page.
- 5 ☐ Use Walk Score application on hand-held devices to register as many amenities as possible along Orchard Lake Road, to increase the score.
- 6 ☐ Write news releases for regional newspapers and radio stations, focused on the Town Center subarea plan, or Orchard Lake corridor plan.
- 7 ☐ Attend conferences provided by MEDC, Michigan Main Street Center, MDA, MTA, MIRD, MML, MSHDA, MEDA, MCDA, ICSC, and/or ULI.
- 8 ☐ Post the Housing Study on the township website, email electronic copies to developers, and provide printed copies at meetings.
- 9 ☐ Promote the Town Center in ShoppingCenterBusiness.com, SiteSelection.com, ICSC.org/news-and-views/sct-magazine, ChainStoreAge.com

PlaceScore™ | West Bloomfield

An assessment of Town Center placemaking, progress, and strategies.



Total PlaceScore = 10
Population ~ 66,000

Progress and Strategies

West Bloomfield Township's Town Center has an overall PlaceScore of just 10 points, which is low given the jurisdiction's resources supported by affluent taxpayers and size (about 66,000 residents). A number of strategies are needed over the next five years to improve its score, ideally to 16 points or higher.

PlaceScore Strategies

1. Design a discrete Sub Area, Corridor, or District Plan for the Town Center.
2. Consider a form-based code (or hybrid) for the Town Center.
3. Prepare a Transportation Improvement Plan for Orchard Lake Road.
4. Consider slip-streets with angle parking, with care for walkability.
5. Ensure that public parking is clearly marked and evident to shoppers.
6. Consider commissioning a retail market strategy for the Town Center.
7. Add a cinema, theater, playhouse, or cultural arts center.
8. Add a pavilion and summer concert series and farmers' market.
9. Develop two-level buildings balanced on both sides of Orchard Lake Rd.
10. Create a freestanding, dedicated website for the Town Center.
11. Add many more Facebook followers and promote placemaking progress.
12. Register amenities in the Town Center to increase the Walk Score.
13. Post the Housing Study on the township website where it is easy to find.



LandUseUSA
UrbanStrategies

The PlaceScore methodology, concept, and name are trademarked by LandUseUSA 2013 – 2018.
Analysis and exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018.

PlaceScore™ Criteria & Results

Used to track Placemaking progress and formulate downtown strategies.

PlaceScore Criteria | 30-Point System

Local-Level Planning Documents

1. Local or Municipal Master Plan (not County)
2. Adopted Zoning Ordinance
3. Pursuing a Form-Based Code or Hybrid
4. Parks & Recreation Plan or Commission

Downtown, Town Center Planning Progress

5. Established BID, CID, or Similar District
6. Downtown, Town Ctr. Subarea, District Plan
7. Streetscape, Transport. Improvement Plan
8. Facade, Rehab, Design/Brand Goals
9. Retail Market Study and Strategy
10. Residential Market Study and Strategy

Downtown Organization and Marketing

11. Participating in State Assistance Programs (RRC)
12. Recipient of Special Designations ("Cool Cities")
13. Uses the Main Street 4-Point Approach
14. Has an Active Facebook Page, Social Media

Unique Amenities & Destinations

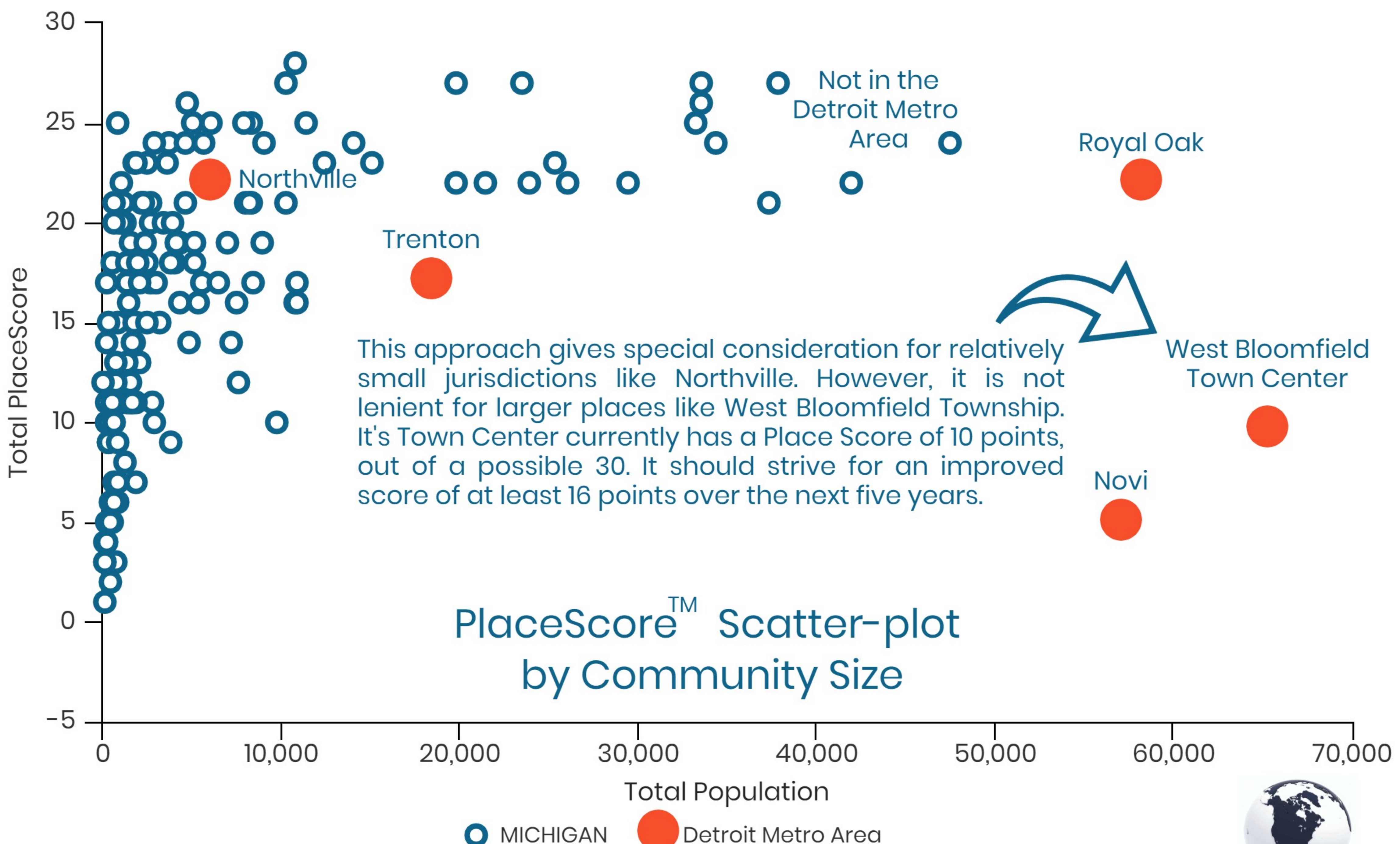
15. Waterfront Access Park and/or Paths
16. Established Farmers' Market
17. Summer Concert Series
18. National or Other Major Festival
19. Cinema, Theater, Playhouse, Cultural Ctr

Downtown Street and Environment

20. Total Reported Walk Score is 50+
21. Walk Score per 1,000 Population is 40+
22. Pedestrian Cross-Walks at Signaled Lights
23. On-Street Angle Parking (not parallel)
24. Off-Street Public Parking is Evident & Signed
25. Two-Level Scale of Historic Buildings
26. Balanced Scale on Both Sides of the Street
27. Two-Way Traffic Flow, not One-Way

Listings or Maps of Merchants & Amenities

28. Listing or Map on Municipal Website
29. Listing or Map on BID, CID, Similar Website
30. Listing or Map on Chamber or CVB Website



PlaceScores™ - Local Placemaking Initiatives and Amenities
(As evident through Online Search Engines)
Selected Places | Oakland County and DM Prosperity Region 10

Place Name	West Bloomfield Town Center	City of Royal Oak	The City of Novi	City of Trenton	The City of Northville	The City of Plymouth
2015 Population (ACS 5-yr)	65,646	58,689	57,577	18,522	5,990	8,952
City/Village-Wide Planning Documents						
1 Local Master Plan (not county)	1	1	1	1	1	1
2 Has a Zoning Ordinance Online	1	1	1	1	1	0
3 Seeking Form-Based Code, Hybrid	0	0	0	0	0	0
4 Parks & Rec. Plan or Commission	1	1	1	1	1	1
Downtown Planning Documents						
5 Established DDA, BID, or Similar	0	1	0	1	1	1
6 DT Master Plan, Subarea Plan	0	0	0	0	1	0
7 Streetscape, Transp. Improv. Plan	0	0	0	0	1	0
8 Retail Market Study or Strategy	0	1	0	0	1	0
9 Residential Market Study, Strategy	1	1	0	1	1	0
10 Façade Program, Design/Brand Goals	1	1	0	1	0	0
Downtown Organization and Marketing						
11 Redevelopment Ready Community	0	0	1	0	0	0
12 Michigan Cool City Designation	0	1	0	0	0	1
13 Member of Michigan Main Street	0	0	0	0	0	0
14 Facebook Page	1	1	0	1	1	1
Listing or Map of Merchants and Amenities						
15 Township or City Main Website	0	0	0	0	0	0
16 CID, BID, or Town Center Website	0	1	0	1	1	1
17 Chamber or CVB Website	1	1	1	0	1	1
Subtotal Place Score (17 points possible)	7	11	5	8	11	7

This PlaceScore assessment is based only on internet research, and has not been field verified.
Analysis and assessment by LandUseUSA © 2017 with some 2018 updates; reflects some stakeholder input.
If a community's amenities and resources are not listed, then the challenge is to improve marking efforts,
and ensure that the resources are available and easy to find through mainstream online search engines.
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PlaceScores™ - Local Placemaking Initiatives and Amenities
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Selected Places | Oakland County and DM Prosperity Region 10

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2015 Population (ACS 5-yr)	65,646	58,689	57,577	18,522	5,990	8,952
Unique Downtown or Town Center Amenities						
1 Cinema/Theater, Playhouse, Cultural	0	1	0	1	1	1
2 Waterfront Access, Waterfront Park	0	0	0	1	1	1
3 Established Farmers' Market	0	1	0	1	1	1
4 Summer Concert Series, Pavilion	0	1	0	0	1	1
5 National or Other Major Festival	0	1	0	0	0	1
Downtown or Town Center Sense of Place						
6 Angle <u>On-Street</u> Parking (not parallel)	0	1	0	1	1	1
7 Total Reported Walk Score is 50+	1	1	0	1	1	1
8 Walk Score/1,000 Pop is 40+	0	0	0	0	0	0
9 Off Street <u>Public</u> Parking is Evident	0	1	0	1	1	1
10 2-Level Scale of <u>Historic</u> Buildings	0	1	0	1	1	1
11 Balanced <u>Scale</u> Both Sides of Street	0	1	0	1	1	1
12 Pedestrian Crosswalks, Signaled	1	1	0	0	1	1
13 Two-way Traffic Flow	1	1	0	1	1	1
Subtotal Place Score (13 points possible)	3	11	0	9	11	12
Total Place Score (30 Points Possible)	10	22	5	17	22	19
Reported Walk Score (avg. = 42)	64	93	49	60	79	62
Walk Score per 1,000 Population	1	2	1	3	13	7

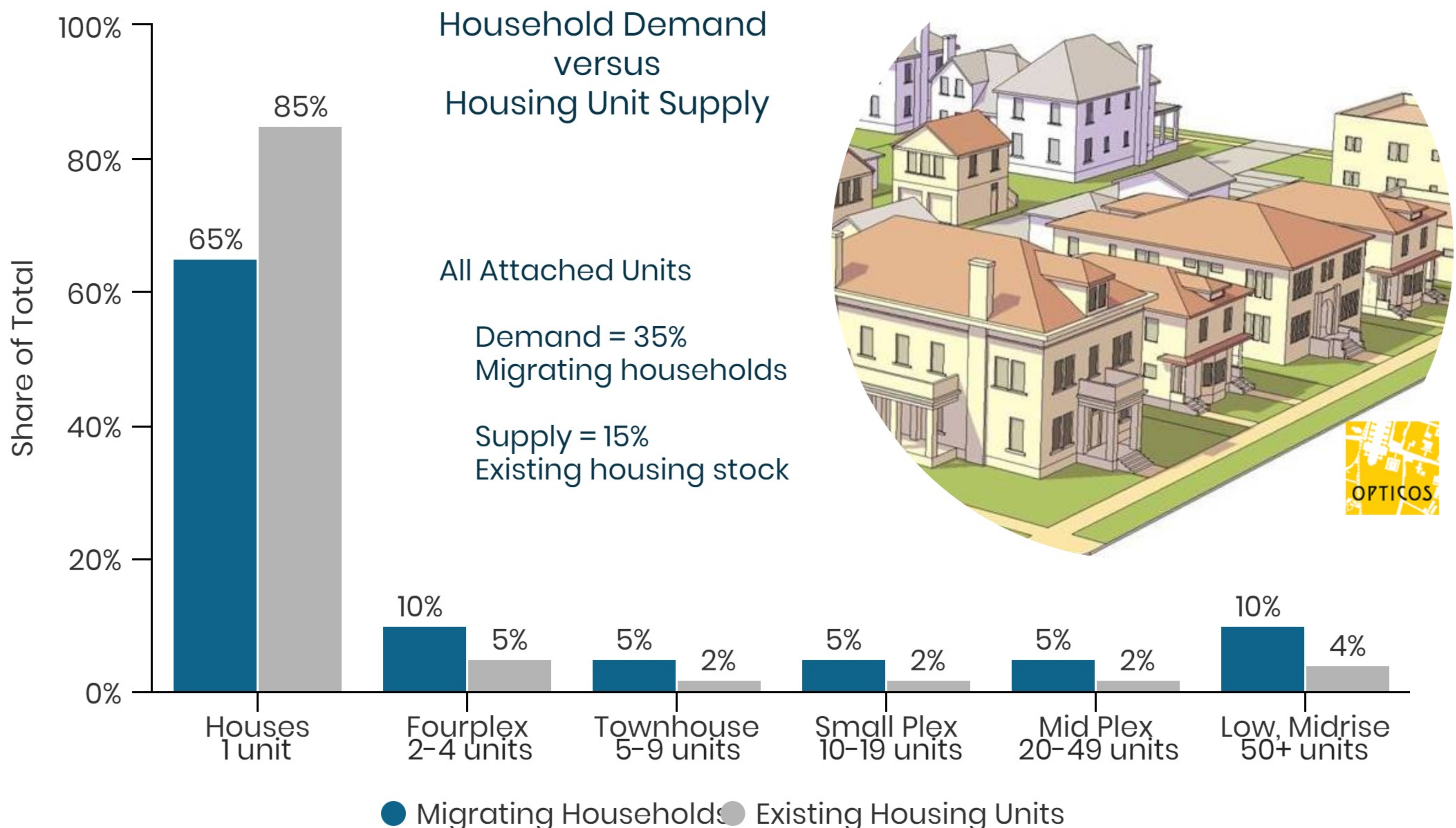
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Section **B**

Missing Housing Formats

The Housing Mismatch | MICHIGAN

A comparison of household demand and housing unit supply by building size.



Introduction – Across the state, cities and developers are beginning to respond to the market gaps and missing housing formats – particularly in the urban places and waterfront settings. Analytic results from countless studies across the state support what most developers know instinctively – the demand for new housing is being driven by singles of all ages who are on the move and seeking for-lease, attached formats located in the downtowns and urban neighborhoods.

With remarkable consistency place-to-place and across the state, there is a mismatch between the preferences of migrating households and the formats of available housing choices. Renters in particular are seeking new housing formats in urban places, and particularly attached units that offer spectacular views of a downtown or natural amenities (lakes, rivers, bluffs, etc.). When they are unable to find choices, then they compromise by renting detached houses.

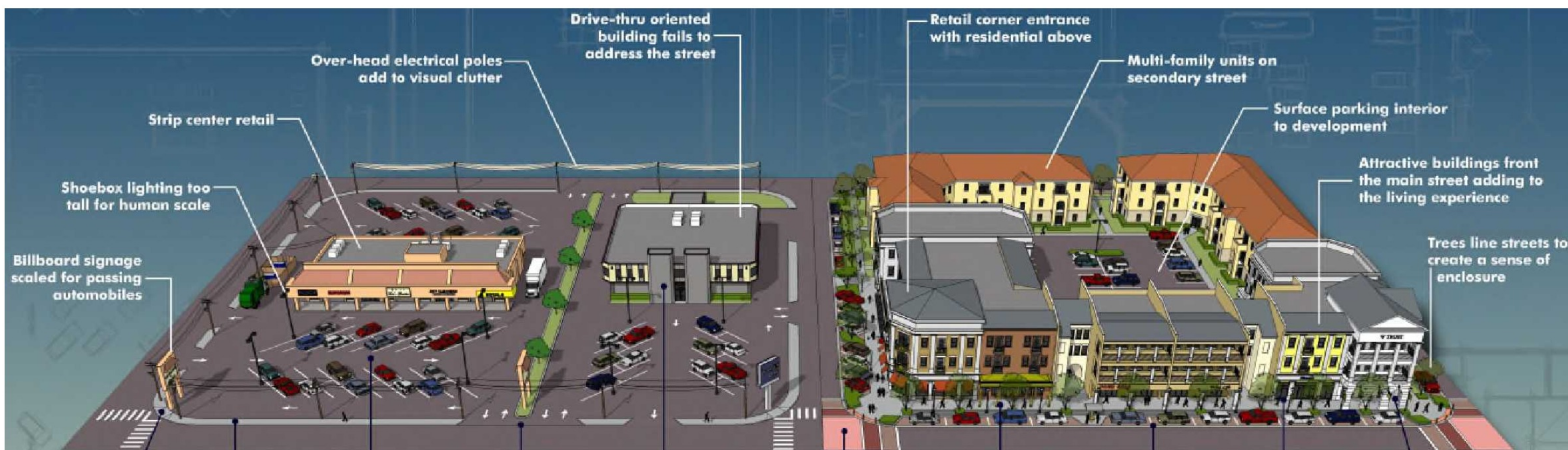
Statewide, only 65% of migrating households are seeking detached houses, and 35% are seeking attached units. However, attached choices represent only 15% of the housing supply. This reinforces the need for more attached for-lease housing formats in urban places. This does not mean that there is a need for more “apartments” at the fringe of the communities. Rather, there is a need for ongoing reinvestment into downtowns with the rehab of lofts above street-front retail, and the addition of townhouses and other transitional formats nearby.

Every Place is Unique – This information represents state-wide averages and generally applies to individual cities, villages, and townships. However, each place has a unique profile, including geographic setting, household composition, tenure, migration, lifestyle clusters (target markets), and existing housing formats. Therefore, the magnitude of market gaps will vary greatly from place to place.



Mixed-Use Development Guides

An introduction to formats preferred by urban target markets & shoppers.



Above: TownMaker's Guide to Healthy Building Placement

Source: Walkable and Livable Communities Institute



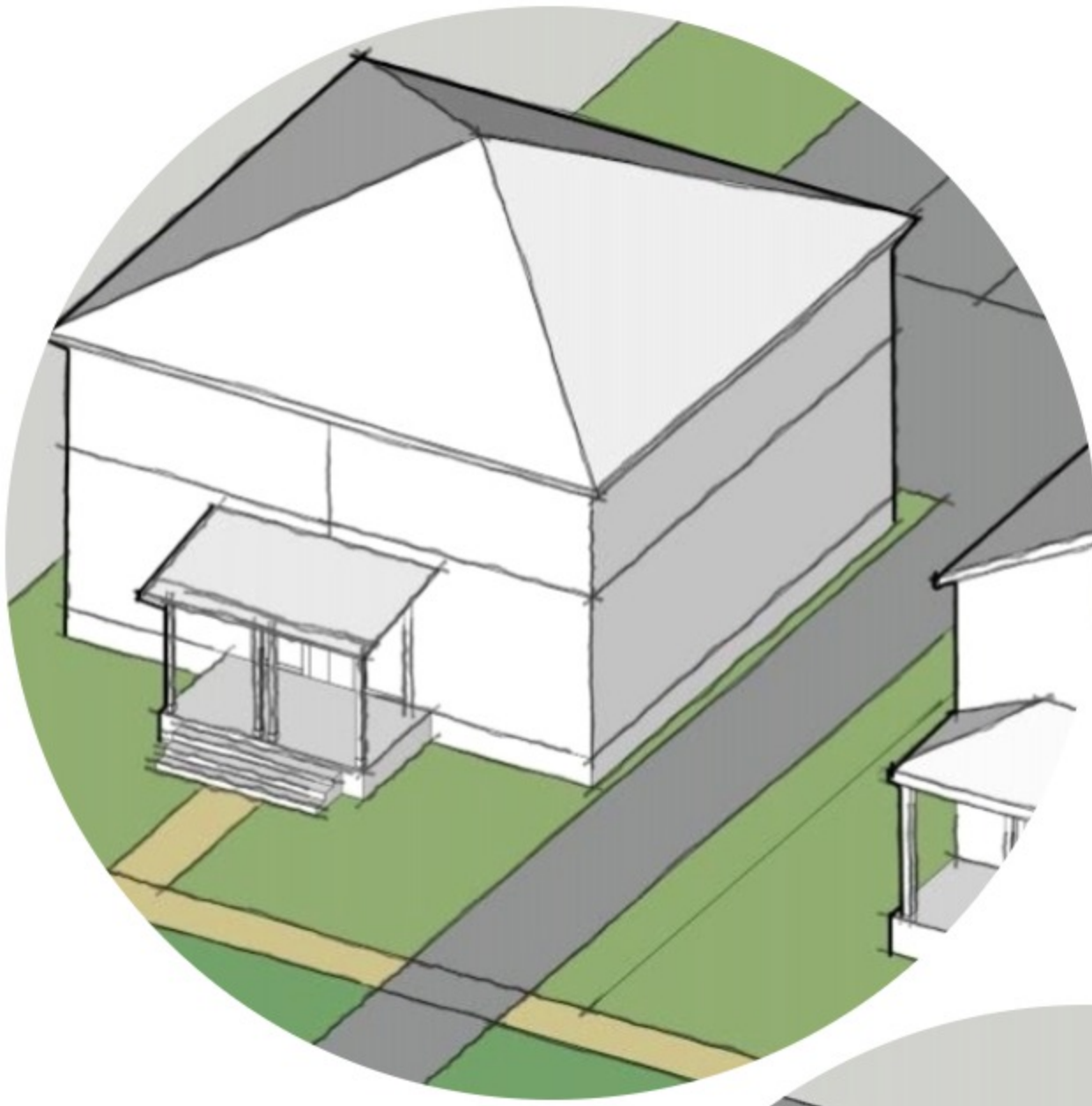
Above and Below: Downtowns and Urban Edges

Source: Dan Parolek and Opticos Design Group



Formats for Incremental Development & Urban Infill

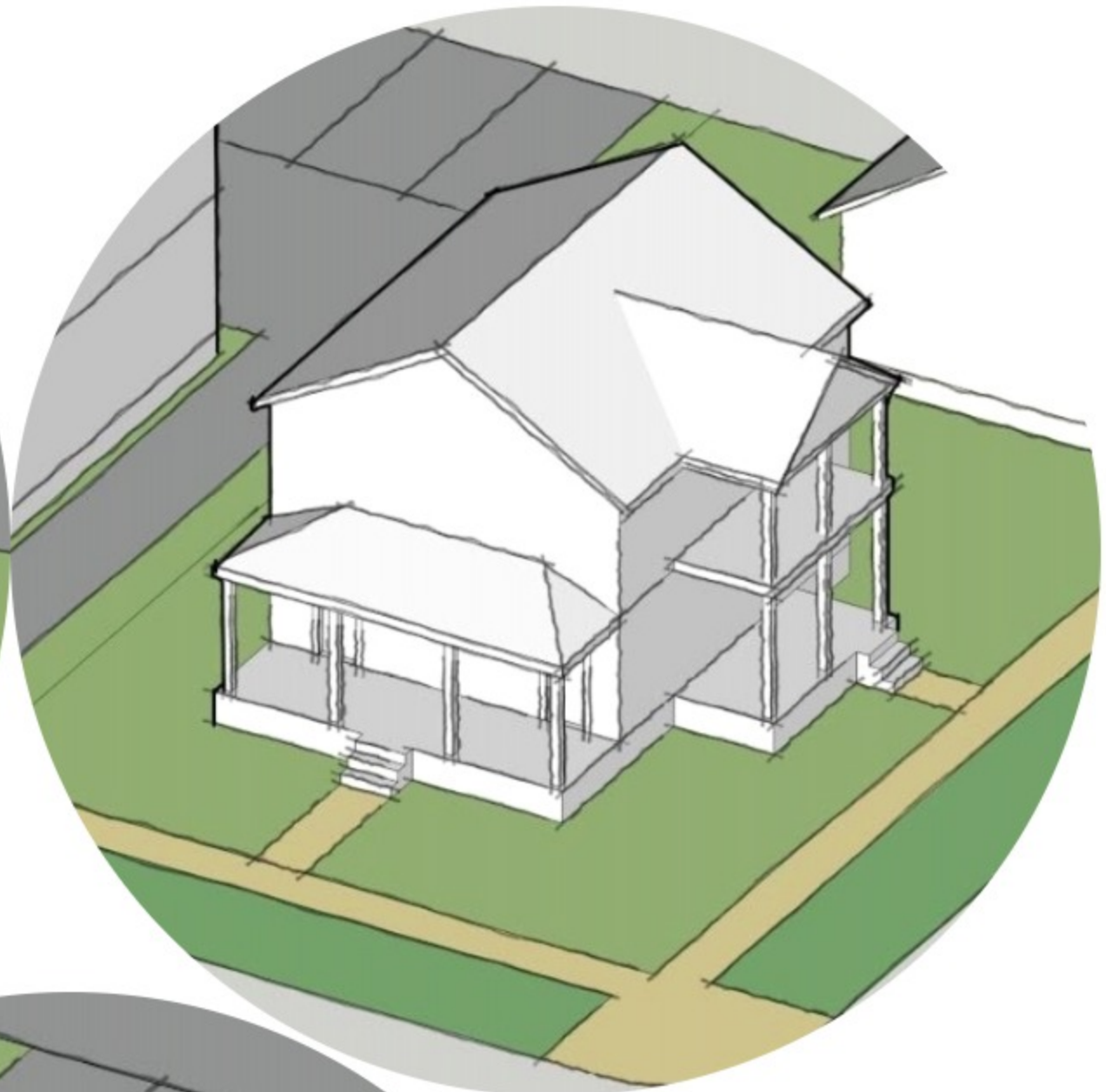
Mansion-
Style
House
2-6 Private
Entrances
For Lease



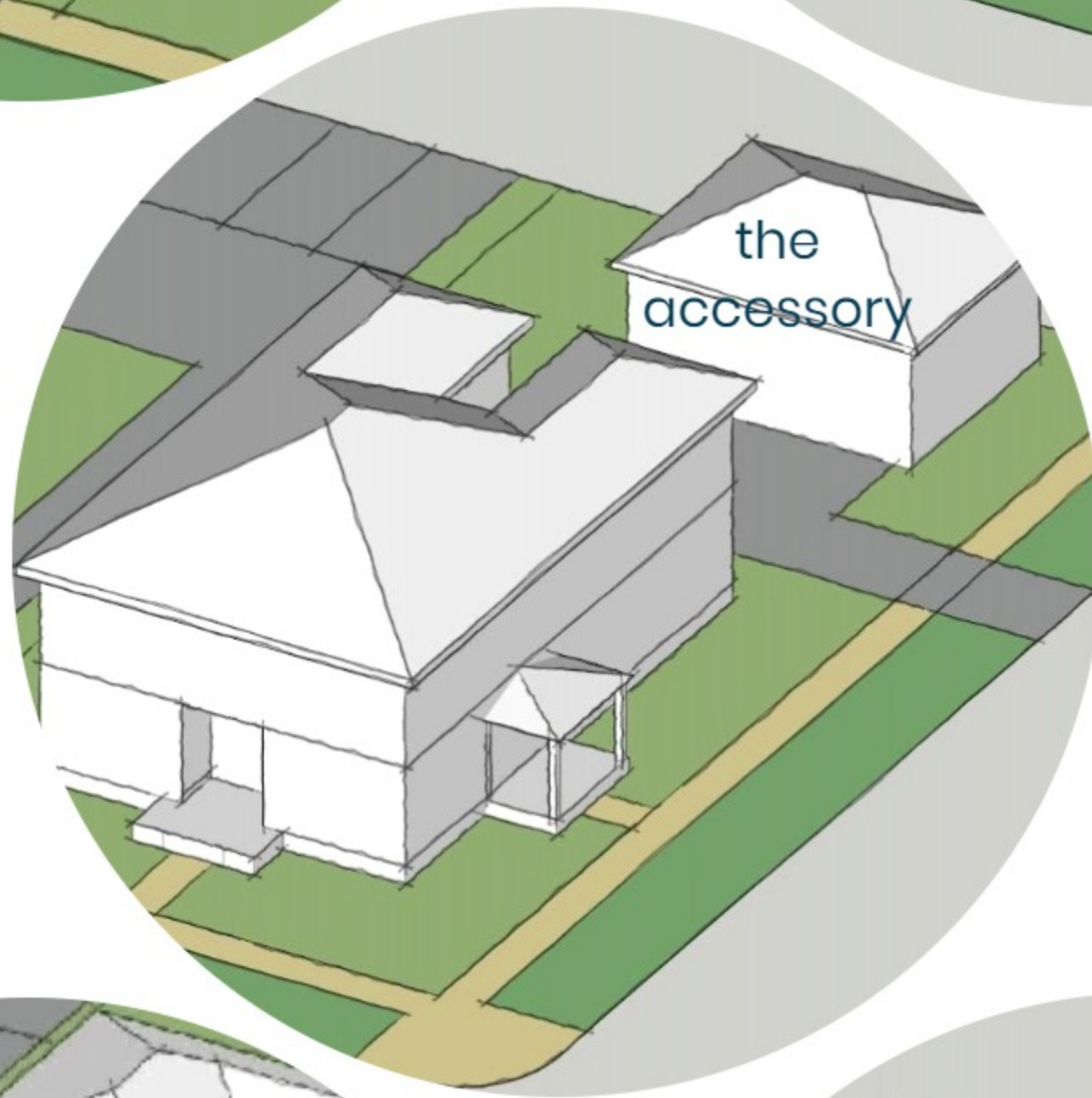
Townhouse
Apartments
2-6 Units
For Lease



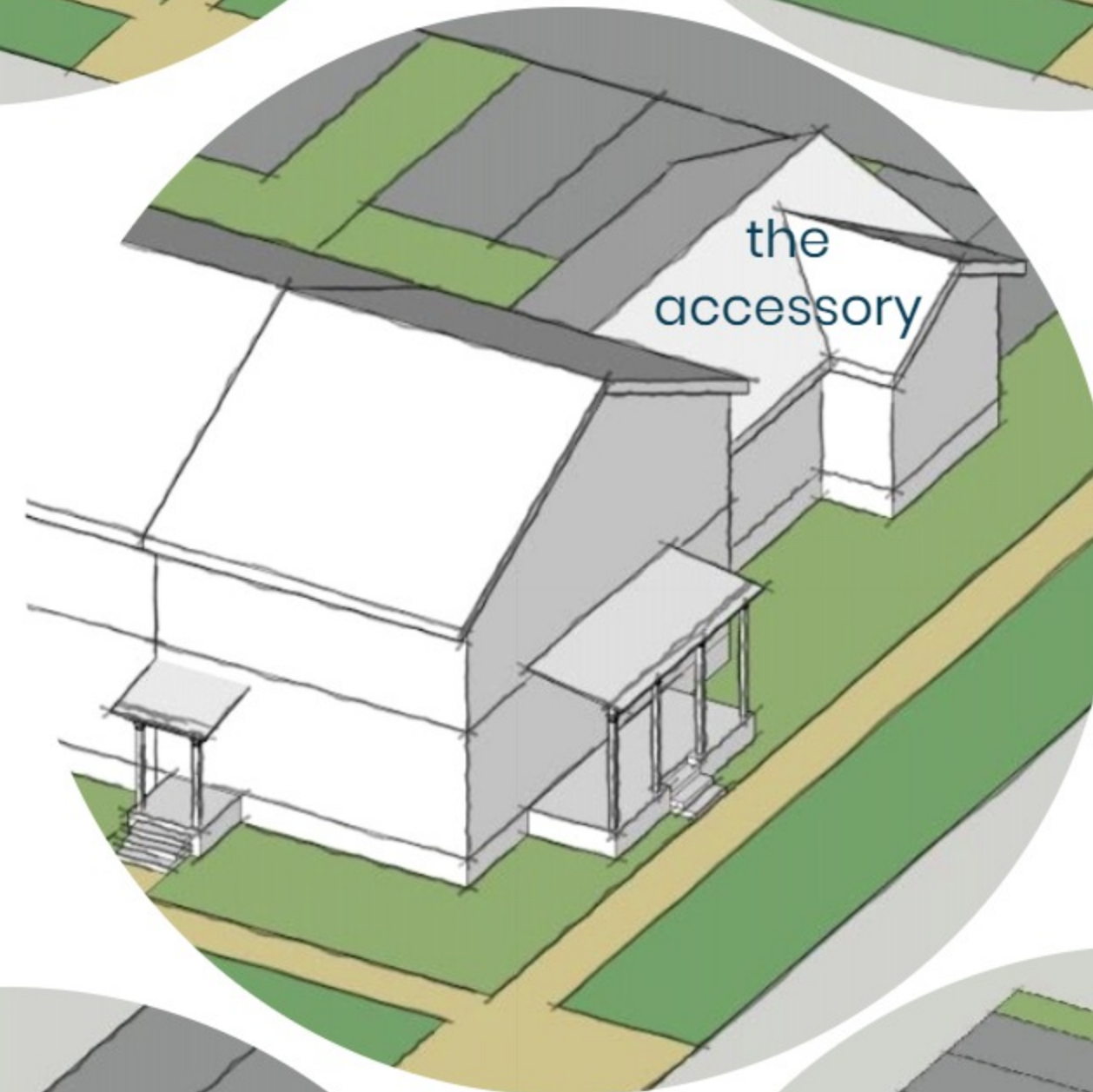
Mansion-
Style
House
2-4 Private
Entrances
For Lease



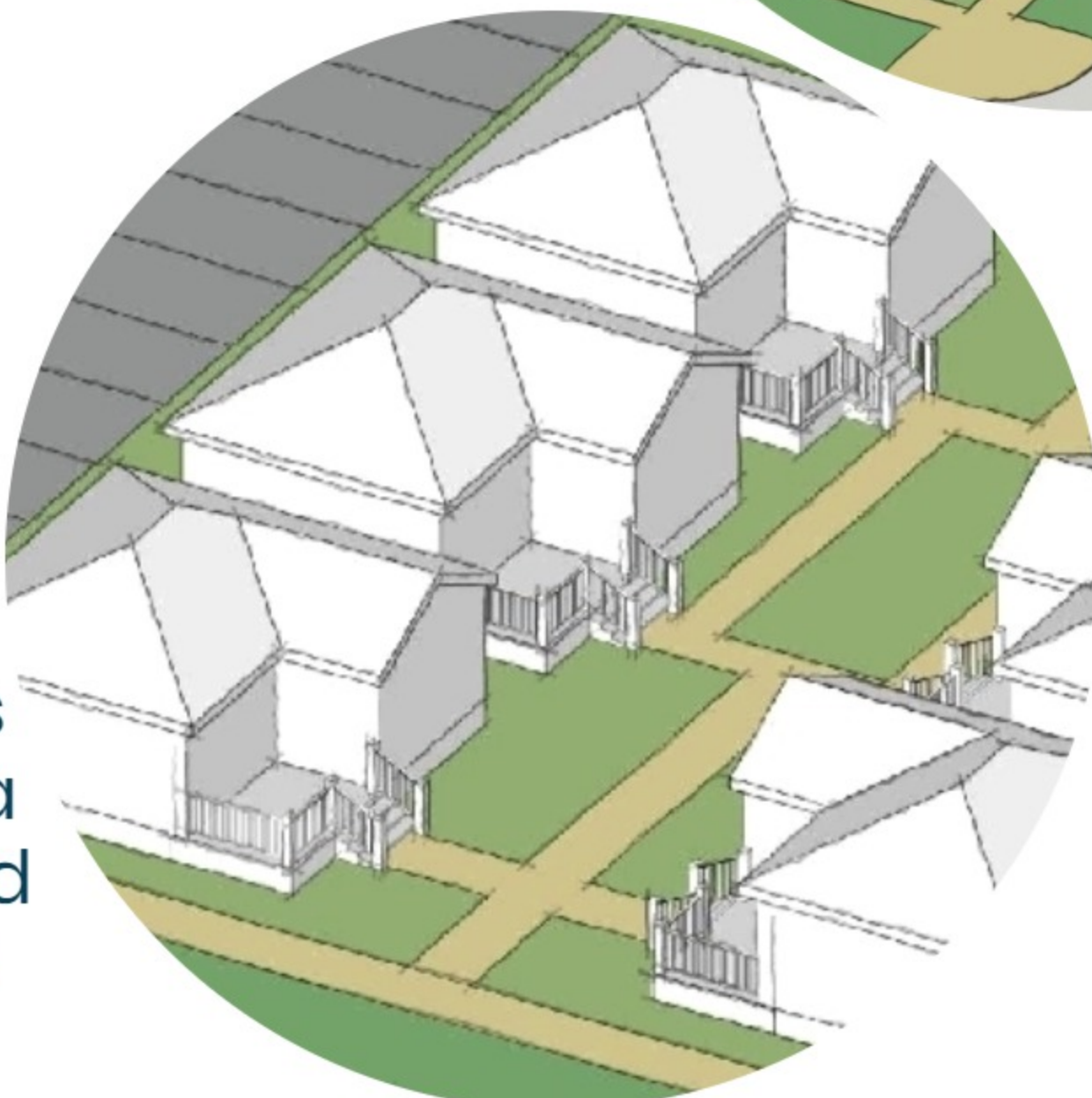
Detached
Accessory
Dwelling
For Lease



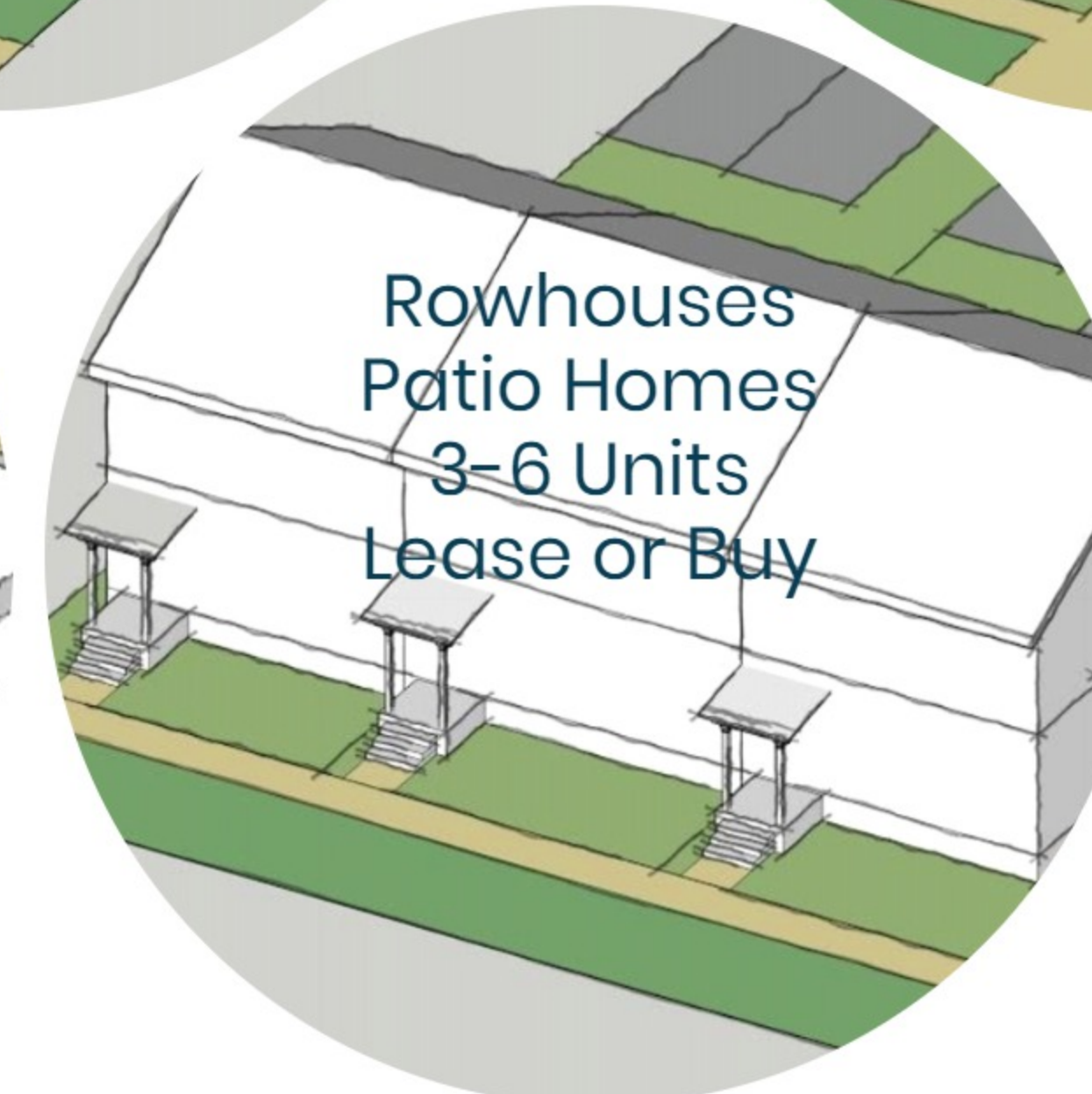
Attached
Accessory
Dwelling
For Lease



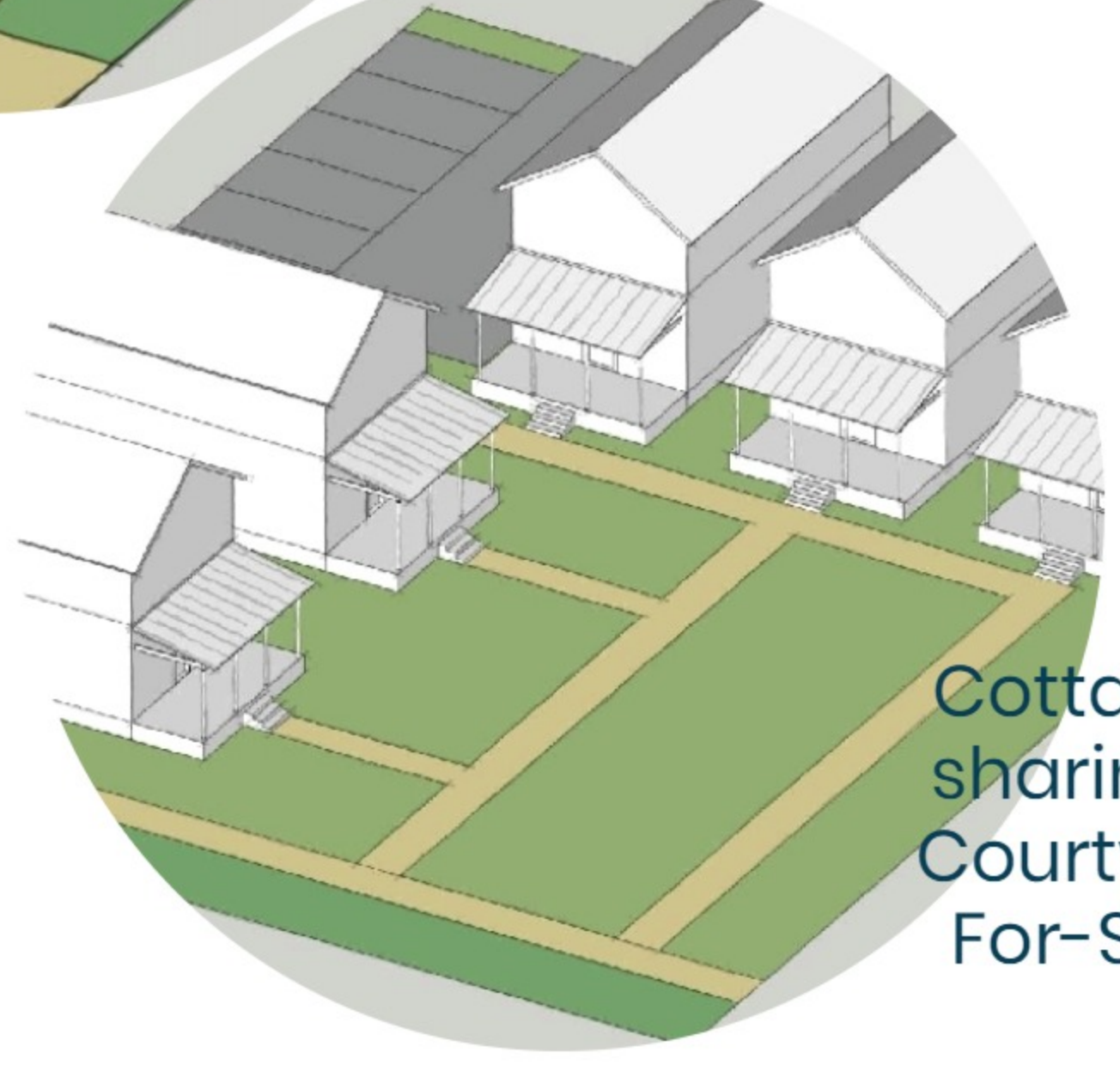
Cottages
sharing a
Courtyard
For Sale



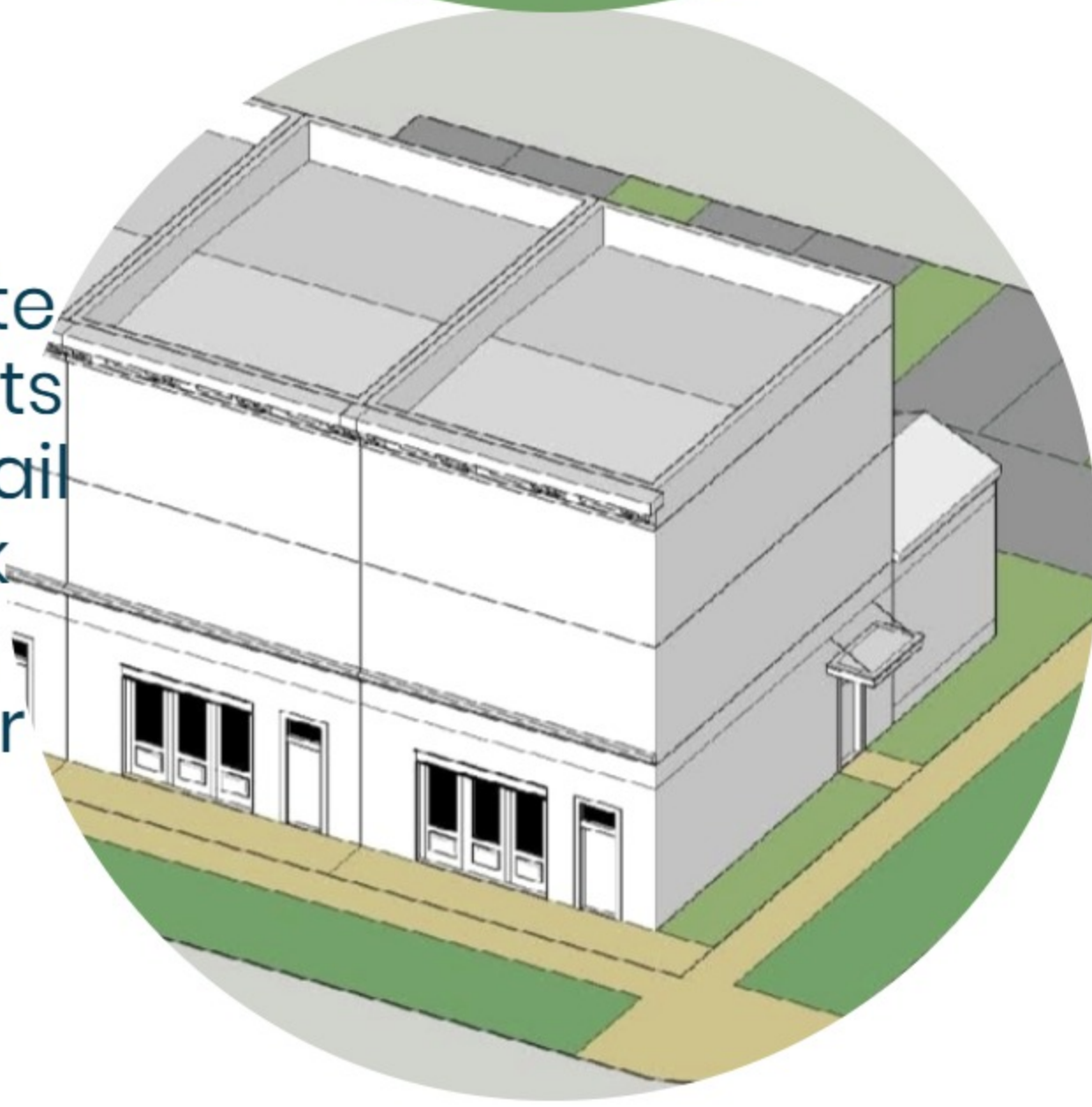
Rowhouses
Patio Homes
3-6 Units
Lease or Buy



Cottages
sharing a
Courtyard
For-Sale



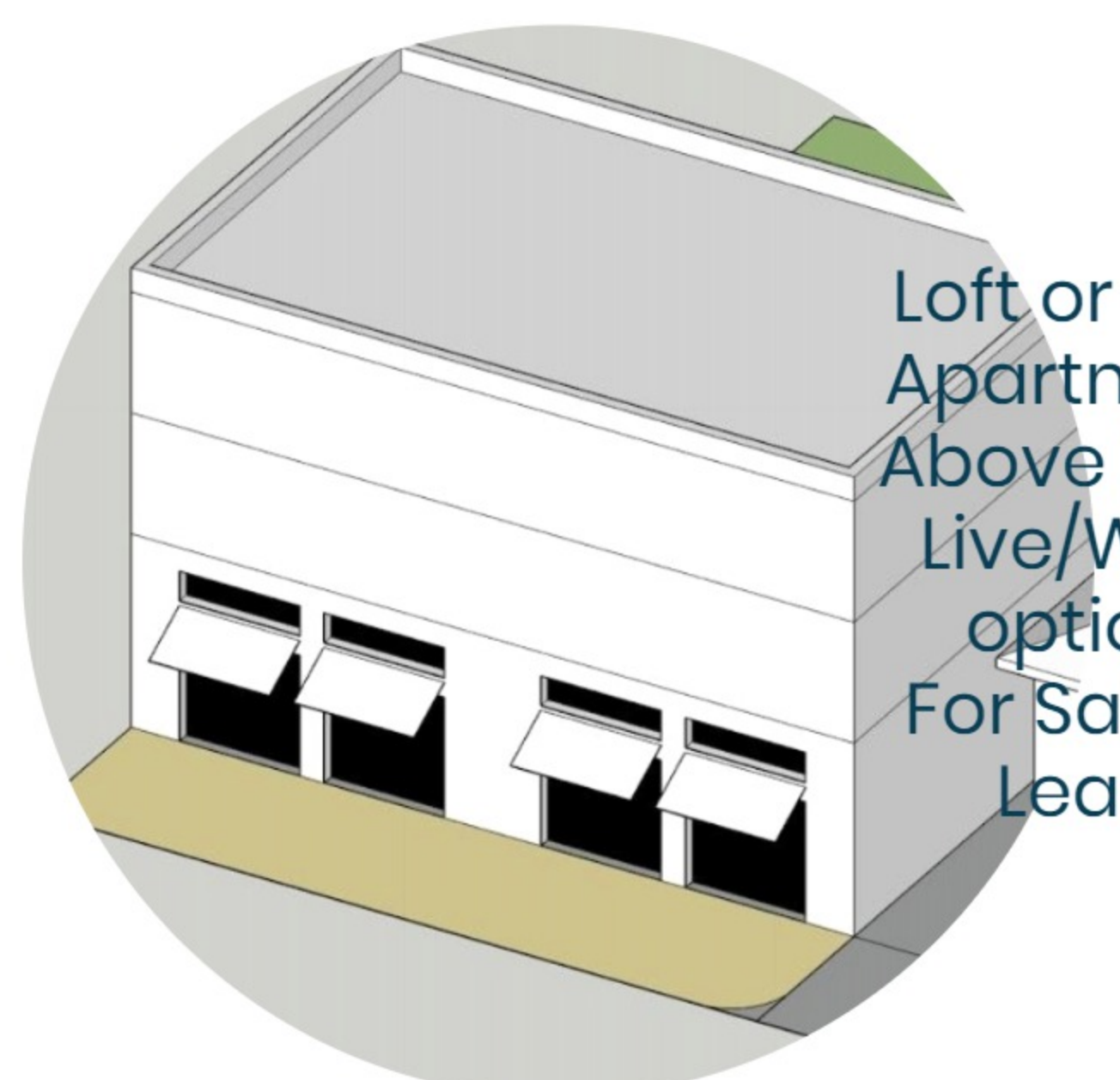
Loft or Suite
Apartments
Above Retail
Live/Work
options
For Sale or
Lease



Walk-Up
3 Stories
12 Lofts



Loft or Suite
Apartments
Above Retail
Live/Work
options
For Sale or
Lease



Source: Exhibits assembled by LandUseUSA with permission from the Incremental Development Alliance © with all rights reserved. Intended for demonstration purposes only and may be reused only with additional permission.

Contact: Jim Kumon, Executive Director
The Incremental Development Alliance
jkumon@incrementaldevelopment.org
direct: (612) 875-1196



Sample Elevations | Missing Middle Housing Formats



Rowhouses, stucco exterior



Rowhouses, clapboard or other siding



Three-level rowhouse with consistent exteriors



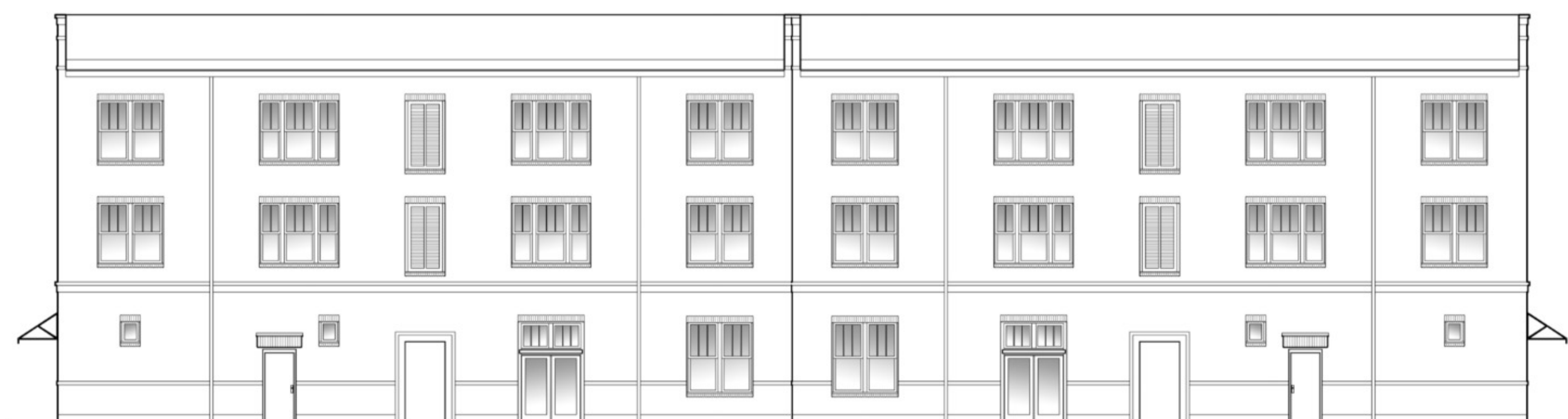
Rowhouse, Tuck-Under



Mews Units: Alley-Loaded Garages



Mews Units: Two Units Stacked Above



Mixed-Use, Residential above Street-front Retail



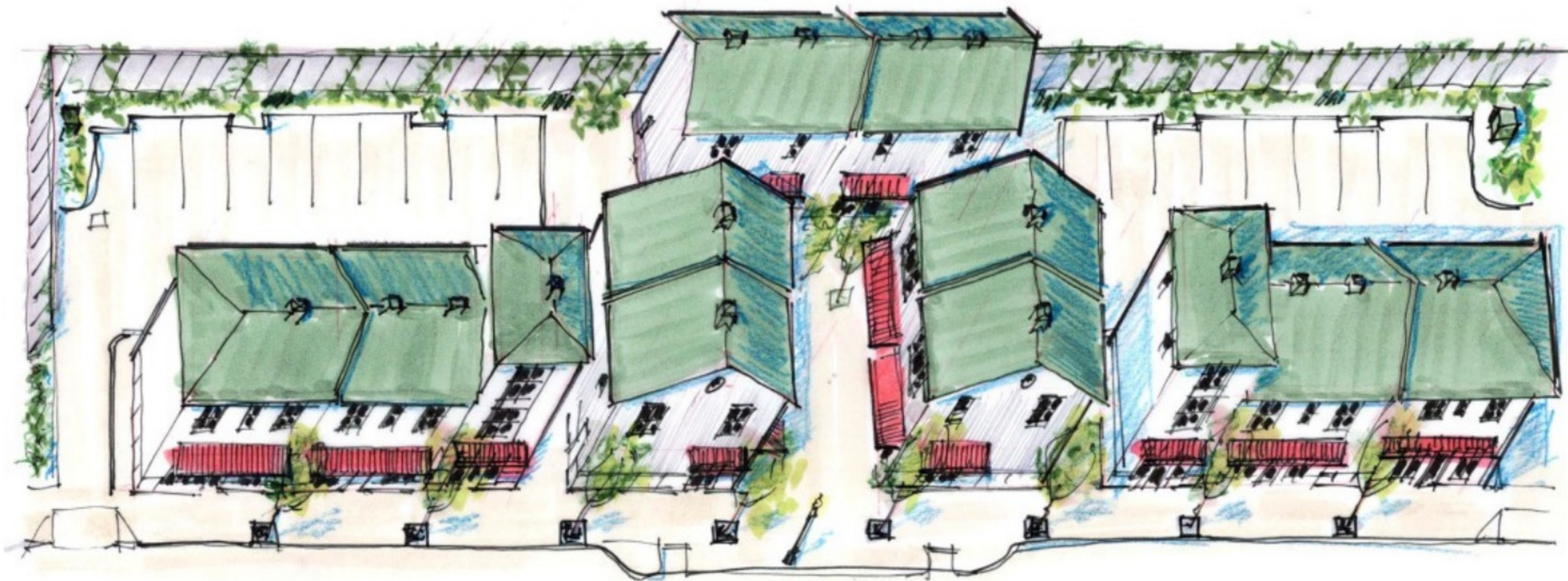
Live-Work Units

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Contact: Anderson | Kim Architecture + Urban Design
R. John Anderson, Principal | direct: (530) 624-5093
email: janderson@andersonkim.com



Quality Renderings of Missing Middle Formats



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Contact: Anderson | Kim Architecture + Urban Design
R. John Anderson, Principal | direct: (530) 624-5093
email: janderson@andersonkim.com



Section C

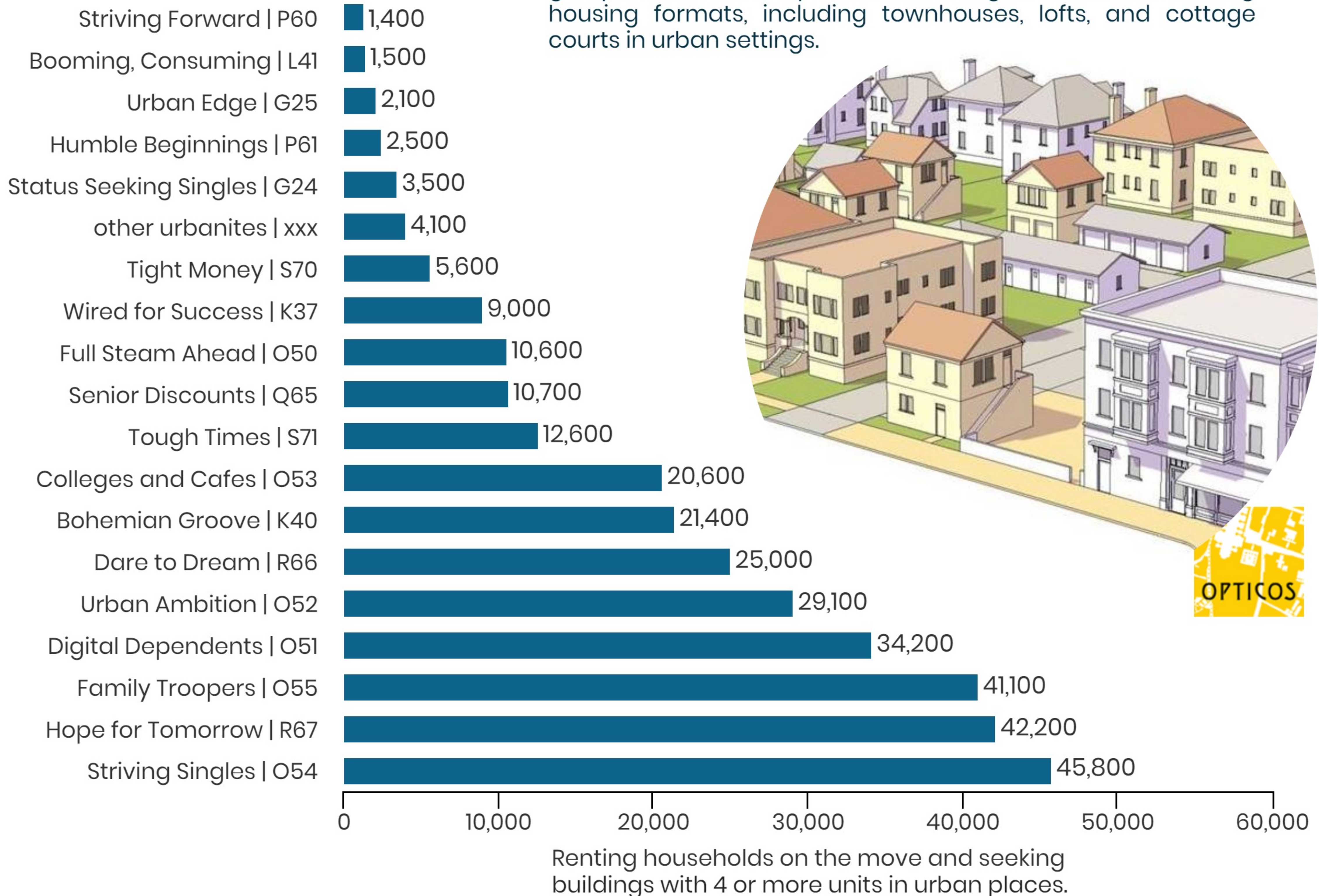
Mosaic Lifestyle Clusters

Urban Target Markets | MICHIGAN

Migrating renters seeking buildings with 4 or more units in urban places.

Urban Households on the Move Seeking Attached Units to Rent The State of Michigan

Among all new households moving into Michigan and seeking buildings with 4 or more units in urban places, the "Striving Singles" lifestyle cluster has the targets number. All of the groups shown here represent ideal target markets for missing housing formats, including townhouses, lofts, and cottage courts in urban settings.



OPTICOS

Urban Target Markets - There are 45,800 households migrating into and within Michigan each year, and who represent "Striving Singles" seeking attached units to rent. The second largest group is "Hope for Tomorrow", followed by "Family Troopers", "Digital Dependents", "Urban Ambition", and "Dare to Dream".

The Striving Singles group has an Experian code of O54, which generally means that it is 54th in income among 71 lifestyle clusters living across the nation. The most affluent urban target market migrating within Michigan is the "Status Seeking Singles", with the 24th highest income among the group. The lowest income target market is "Tough Times", but the "Hope for Tomorrow" group is nearly as poor and far more prevalent.

These lifestyle clusters all represent good targets for new housing formats in urban places. However, new developments must not be targeted exclusively at any single group. Rather, income-integrated buildings are needed for migrating singles of all ages. Avoiding exclusive formats and branding like "affordable housing", "worker housing", "senior housing", "student housing", and "luxury living" will help new developments achieve the highest possible absorption rates while fostering diversity.

1-36 Lifestyle Clusters | Short Descriptions

As defined by Experian Decision Analytics with refinements by LandUseUSA © 2018.

A01 - American Royalty - Wealthy influential couples and families in prestigious communities - Suburbs.

A02 - Platinum Prosperity - Wealthy and established empty-nesting couples - Suburbs.

A03 - Kids and Cabernet - Prosperous, middle-aged married couples focused on their children's lives - Suburbs.

A04 - Picture Perfect Families - Established families of child-raising households in wealthy communities - Suburbs.

A05 - Couples with Clout - Middle-aged childless couples living in affluent areas - Metros.

A06 - Jet Set Urbanites - Mix of affluent singles and couples enjoying diverse neighborhoods - Urban.

B07 - Generational Soup - Affluent couples and multi-generational families living a wide range of lifestyles - Suburbs.

B08 - Babies and Bliss - Middle-aged couples with large families and active lives - Suburbs.

B09 - Family Fun-tastic - Upscale, middle-aged families with busy lives focused on older children - Satellite Cities.

B10 - Cosmopolitan Achievers - Affluent middle-aged, established couples & families with dynamic lifestyles - Metros.

C11 - Aging of Aquarius - Upscale boomer-aged couples settled in detached houses - Cities, Nearby Suburbs.

C12 - Golf Carts and Gourmets - Upscale retirees & empty-nesters in comfortable golf communities - Urban Edges.

C13 - Silver Sophisticates - Mature, upscale couples & singles in larger detached houses - Suburbs.

C14 - Boomers and Boomerangs - Baby boomer adults with young adult children sharing their house - Suburbs.

D15 - Sports Utility Families - Upscale, multi-generational, middle-aged families with active lifestyles - Outer Suburbs.

D16 - Settled in Suburbia - Upper-middle-income diverse families & empty nesters - Established Suburbs.

D17 - Cul de Sac Diversity - Culturally diverse, middle-aged families settling into emerging communities - Suburbs.

D18 - Suburban Attainment - Upper middle-class couples and families moving to newer communities - Suburbs.

E19 - Full Pockets, Empty Nests - Empty-nesters with discretionary income and sophisticated lifestyles - Most Cities.

E20 - No Place Like Home - Middle-to-upper income, multi-generational households in detached houses - Urban Edges.

E21 - Unspoiled Splendor - Comfortably established baby boomer couples in detached houses - Small Cities, Rural Areas.

F22 - Fast Track Couples - Young, upwardly-mobile couples with active lifestyles - Inner Suburbs.

F23 - Families Matter Most - Young, middle-to-upper income families with active, family-focused lives - Suburbs.

G24 - Status Seeking Singles - Young, upwardly-mobile singles balancing work and leisure - Metros, Urban.

G25 - Urban Edge - Younger, up-and-coming singles living big-city lifestyles - Largest Metros.

H26 - Progressive Potpourri - Mature couples with comfortable and active lives - Suburbs.

H27 - Birkenstocks and Beemers - Middle-to-upper income couples living leisurely lifestyles - Small Cities.

H28 - Everyday Moderates - Multi-cultural couples & families choosing modest lifestyles - Suburbs to Mid-sized Cities.

H29 - Destination Recreation - Middle-aged couples working hard to support active lifestyles - Small Cities, Suburbs.

I30 - Stockcars and State Parks - Middle-income couples & families seeking affordable entertainment - Small Cities.

I31 - Blue Collar Comfort - Middle-income families working solid, blue-collar jobs - Small Cities.

I32 - Steadfast Conventionalists - Conventional Gen-X families living in conventional detached houses - Coastal Cities.

I33 - Balance and Harmony - Middle-income families with lively lifestyles - City-Centric Neighborhoods.

J34 - Aging in Place - Middle-income seniors established in their homes and preferring to stay there - Suburban.

J35 - Rural Escape - Older, middle-income couples & singles living modestly comfortable lives - Small Cities, Rural Areas.

J36 - Settled and Sensible - Older, middle-income, empty nesting couples & singles living sensibly - City Neighborhoods.

37-71 Lifestyle Clusters | Short Descriptions

As defined by Experian Decision Analytics with refinement by LandUseUSA © 2018.

K37 - Wired for Success - Young, middle-income singles and couples living socially-active lives - Cities.

K38 - Gotham Blend - Middle-aged, middle-income singles & couples with big city lifestyles - Urban, Large Cities.

K39 - Metro Fusion - Middle-aged singles living active lifestyles - Urban.

K40 - Bohemian Groove - Older, unattached singles enjoying settled lives in detached houses - Urban Neighborhoods.

L41 - Booming and Consuming - Older empty nester couples and singles enjoying relaxed lifestyles - Small Cities.

L42 - Rooted Flower Power - Middle-income baby boomer singles & couples, rooted & nearing retirement - Suburban.

L43 - Homemade Happiness - Middle-income baby boomers in detached houses - Small Cities, Rural.

M44 - Red, White, Bluegrass - Middle-income families with diverse household dynamics - Rural.

M45 - Infants and Debit Cards - Young, working families & single parents in small houses - Urban Neighborhoods.

N46 - True Grit Americans - Older, middle-income households located in nation's mid-section - Small Cities, Rural.

N47 - Countrified Pragmatics - Middle-income couples and singles with casual lifestyles - Rural.

N48 - Rural Southern Bliss - Middle-income, multi-generational families in the nation's south - Small Cities, Rural.

N49 - Touch of Tradition - Working, middle-aged couples and singles in detached houses - Rural.

O50 - Full Steam Ahead - Young and middle-aged singles on the move forward and upward - Mid-Sized Cities.

O51 - Digital Dependents - Gen-X and Gen-Y singles living digitally-driven lifestyles - Urban.

O52 - Urban Ambition - Gen-Y singles, some with children, moving into urban places - Mid-Sized Cities, Urban.

O53 - Colleges and Cafes - Young singles, recent grads, faculty & staff connected to colleges - College Towns.

O54 - Striving Single Scene - Young singles living in the nation's midwest and south - City Centers, Urban.

O55 - Family Troopers - Families & single parents, with current or recent connections to the military - Nationwide.

P56 - Mid-Scale Medley - Middle-aged, moderate-income singles, many starting over - Mid-Sized Cities.

P57 - Modest Metro Means - Moderate-income singles settled in moderate communities - Inner-City Neighborhoods.

P58 - Heritage Heights - Moderate-income singles & families settled in apartments - Urban, Compact Neighborhoods.

P59 - Expanding Horizons - Middle-aged, middle-income families - Border Towns.

P60 - Striving Forward - Moderate-income families & single parents in newer communities - Urban Edges.

P61 - Humble Beginnings - Multi-cultural singles, some with children, starting in apartments - Inner-Cities, Urban.

Q62 - Reaping Rewards - Retired couples and widowed singles living relaxed, quiet lives in detached houses - Suburban.

Q63 - Footloose and Family Free - Older couples and widowed singles living active, comfortable lives - Urban Edges.

Q64 - Town Elders - Elders and community leaders settled into small houses and living frugally - Small Cities.

Q65 - Senior Towers - Low-income seniors settled into apartments with some rent assistance - Metros, City Edges.

R66 - Dare to Dream - Aspiring young couples & singles, some with children, just starting out - Inner-City, Urban.

R67 - Hope for Tomorrow - Hopeful, young, single parents with low-incomes, living in apartments - Mid-Sized Cities.

S68 - Small Towns, Shallow Pockets - Older, low-income empty nesters & singles with tight budgets. - Small Satellite Cities.

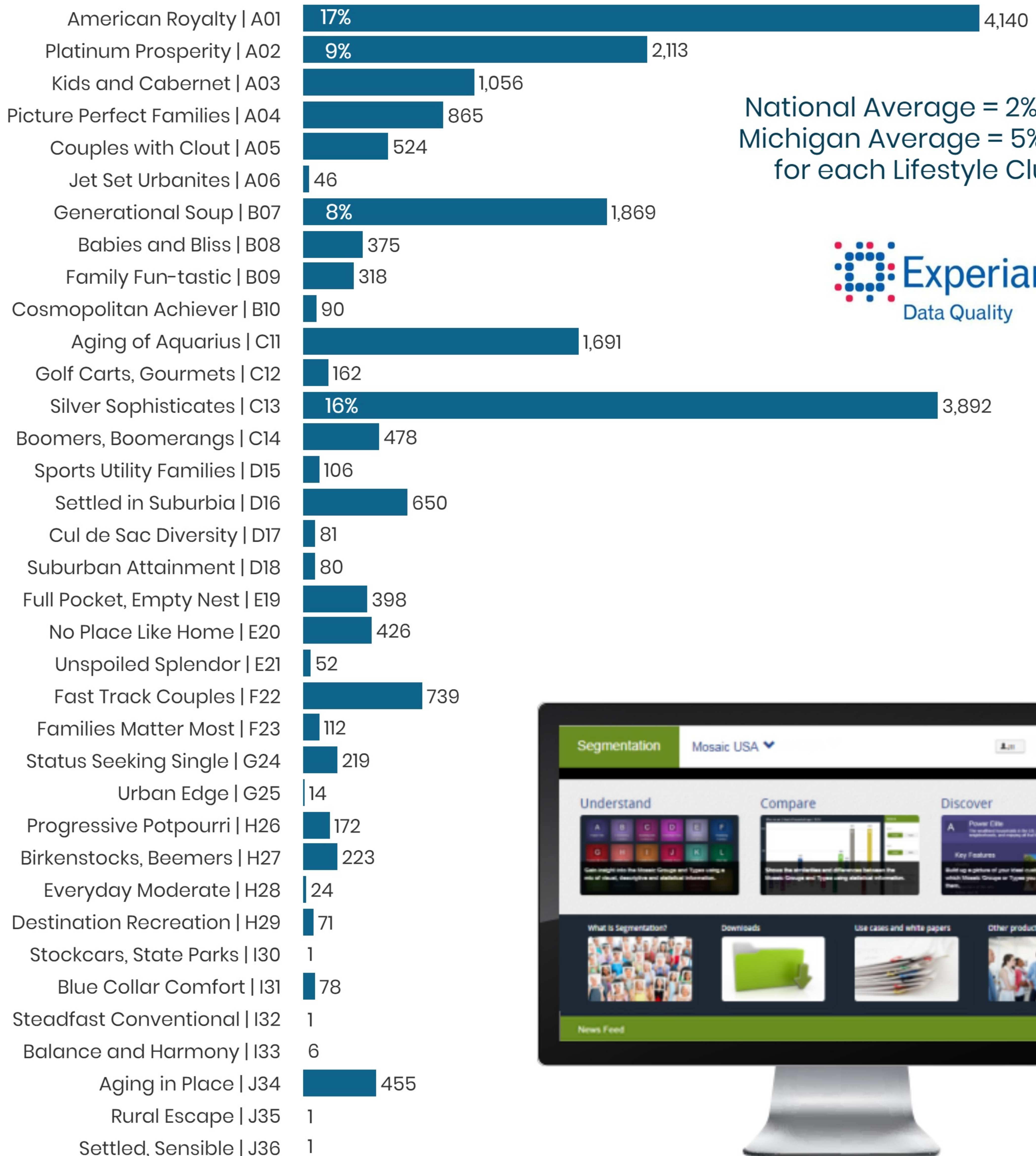
S69 - Urban Survivors - Older, low-income singles, some with children, settled & living modestly - Urban Neighborhoods.

S70 - Tight Money - Middle-aged, low-income, unattached singles seeking to move upward - Small Cities, Urban Edges.

S71 - Tough Times - Older, low-income singles, struggling to get by in apartments - Inner-Cities, Compact Neighborhoods.

1-36 Lifestyle Clusters | West Bloomfield

Established Lifestyle Clusters | Number of households currently living in the township.



National Average = 2% or less
Michigan Average = 5% or less
for each Lifestyle Cluster

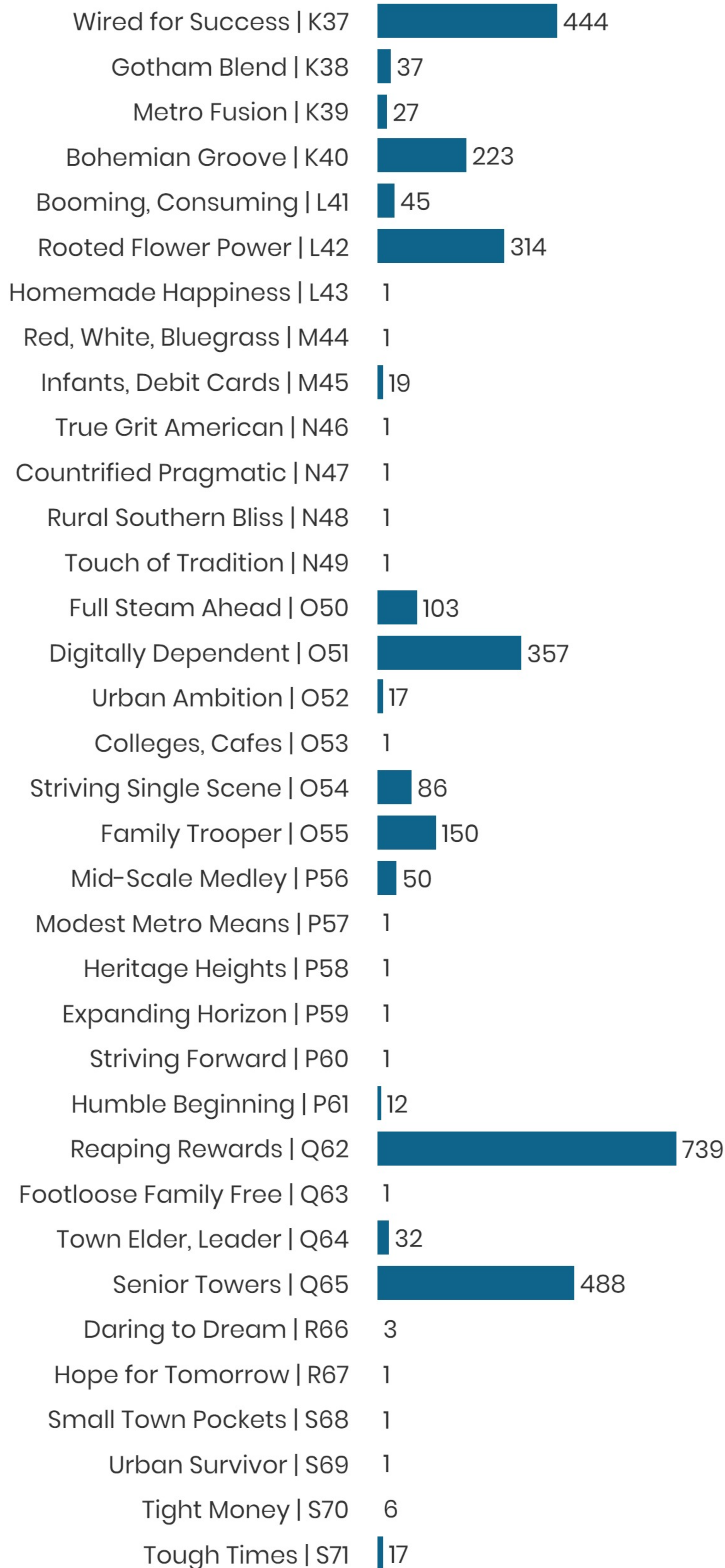


LandUseUSA
UrbanStrategies

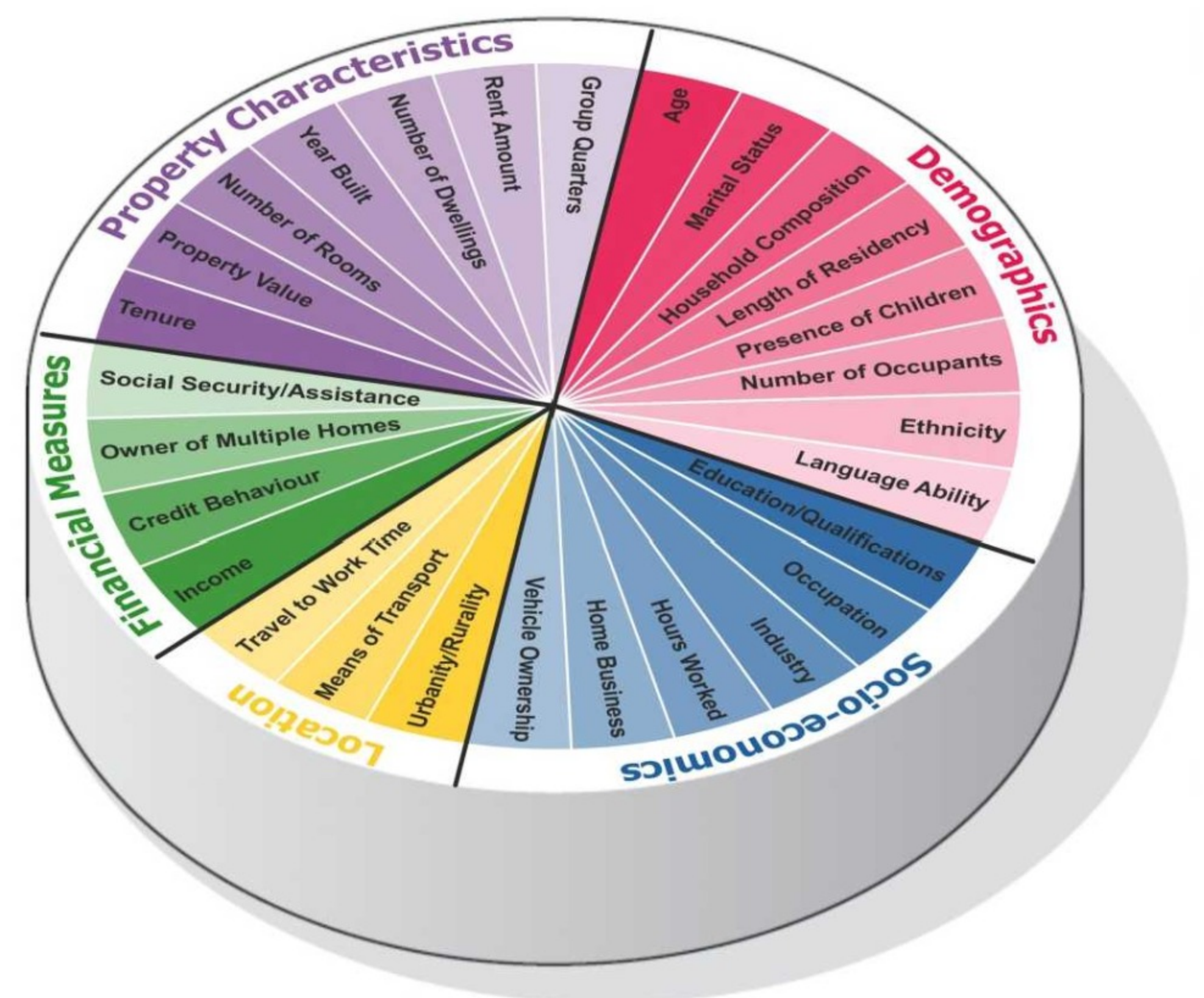
Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of West Bloomfield Township, 2018.

37-71 Lifestyle Clusters | West Bloomfield

Established Lifestyle Clusters | Number of households currently living in the township.



National Average = 2% or less
Michigan State Average = 5% or less
for each Lifestyle Cluster

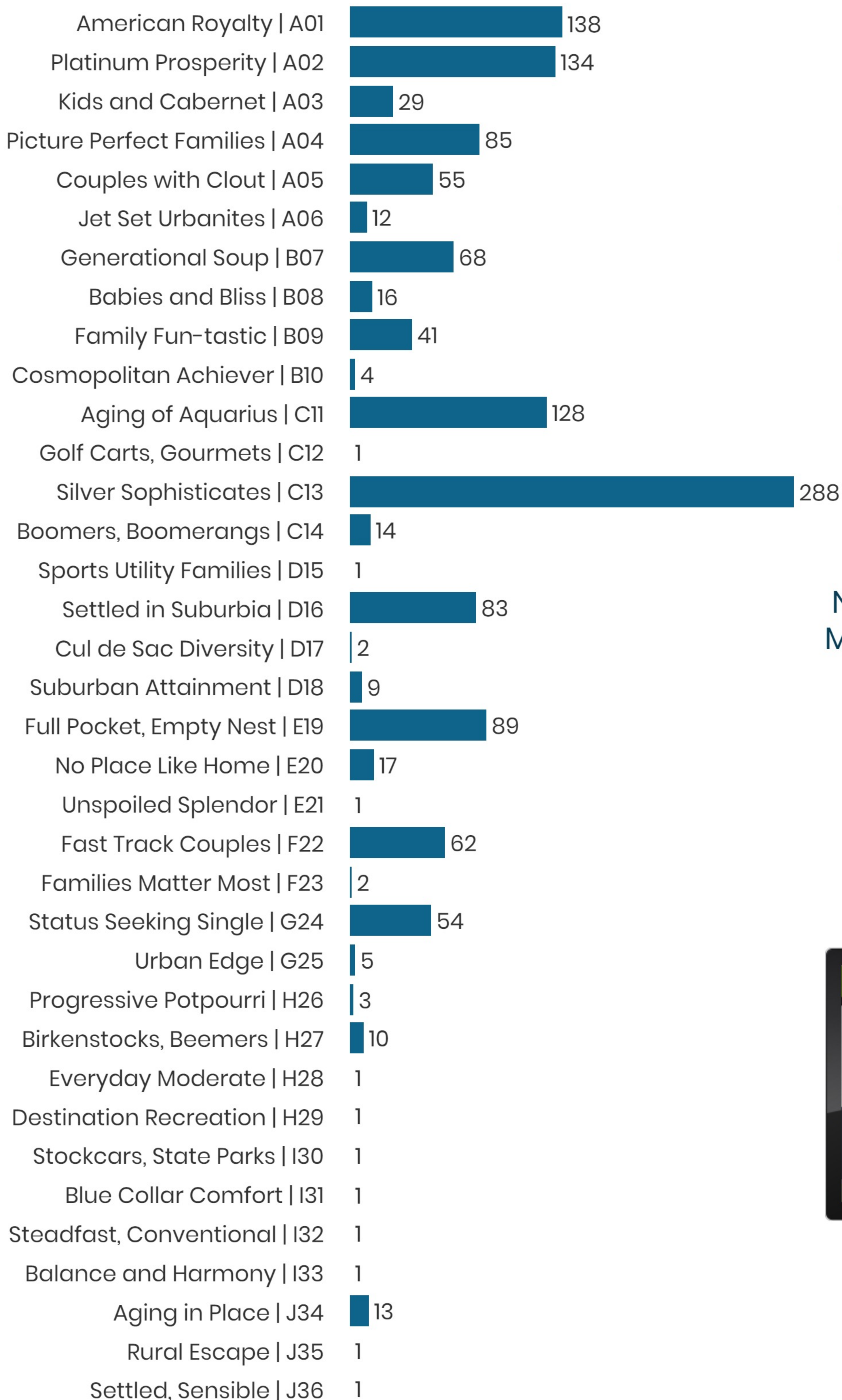


LandUseUSA
UrbanStrategies

Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of West Bloomfield Township, 2018.

1-36 Lifestyle Clusters | Half Mile Radius

The number of households currently living within 0.5 miles of the Town Center.



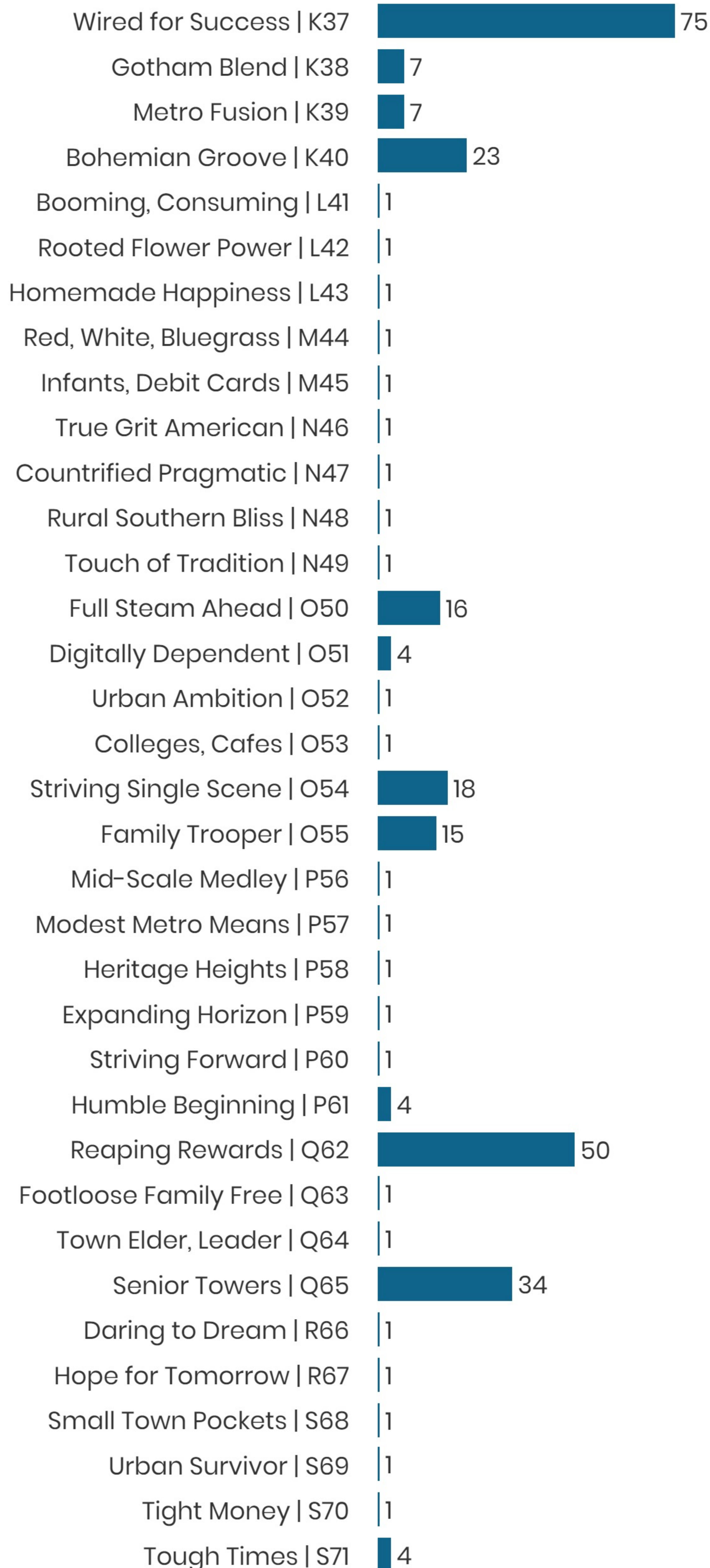
0.5 Miles (Half Mile)
West Bloomfield Township
Oakland County, Michigan

National Average = 2% or less
Michigan Average = 5% or less
for each Lifestyle Cluster
(i.e., more homogenous)

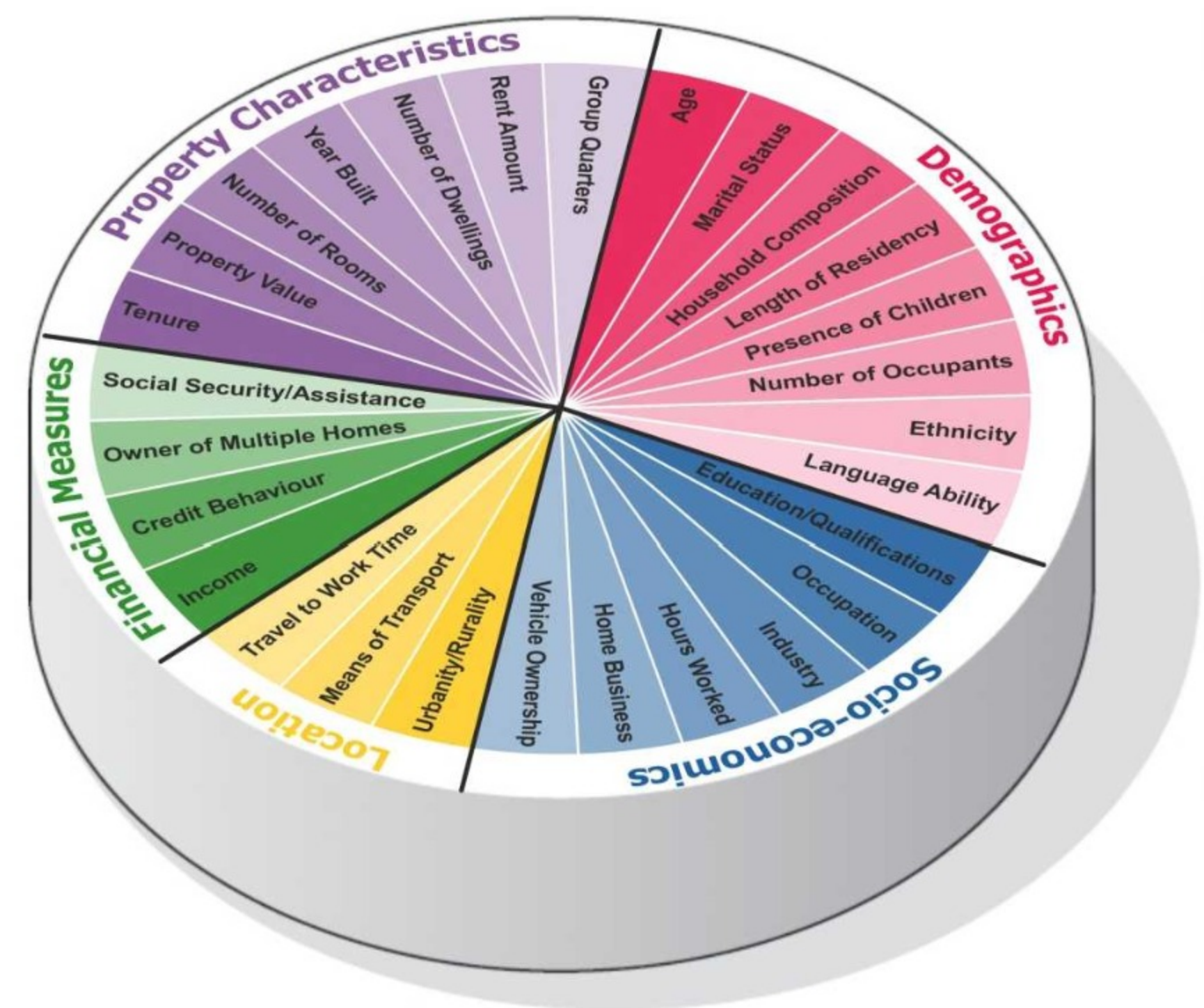


37-71 Lifestyle Clusters | Half Mile Radius

The number of households currently living within 0.5 miles of the Town Center.



0.5 Miles (Half Mile)
West Bloomfield Township
Oakland County, Michigan

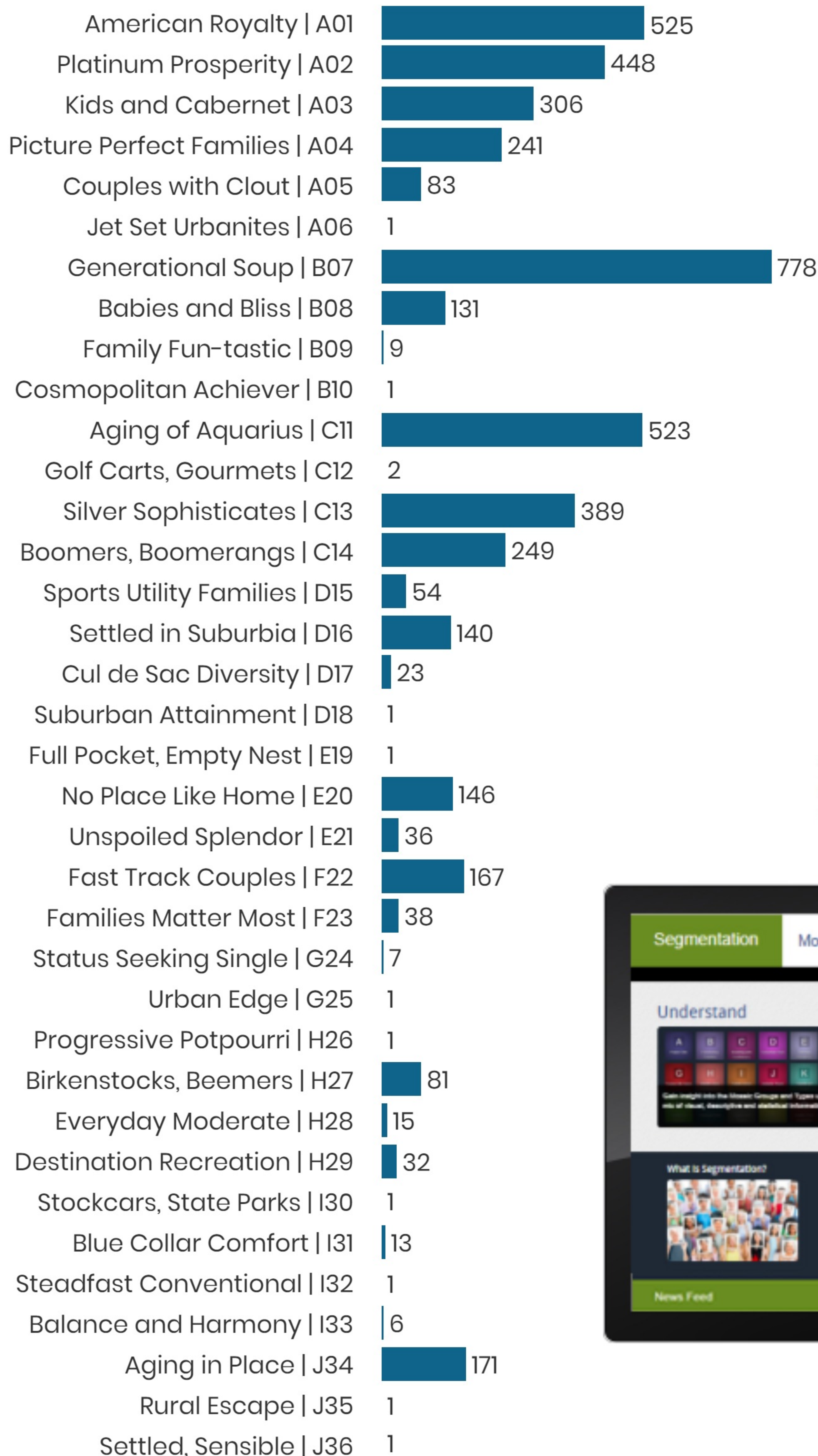


National Average = 2% or less
Michigan State Average = 5% or less
for each Lifestyle Cluster
(i.e., more homogenous)



1-36 Lifestyle Clusters | Northwest Quadrant

Households currently living in the northwest quadrant of West Bloomfield Township.



National Average = 2% or less
Michigan Average = 5% or less
for each Lifestyle Cluster

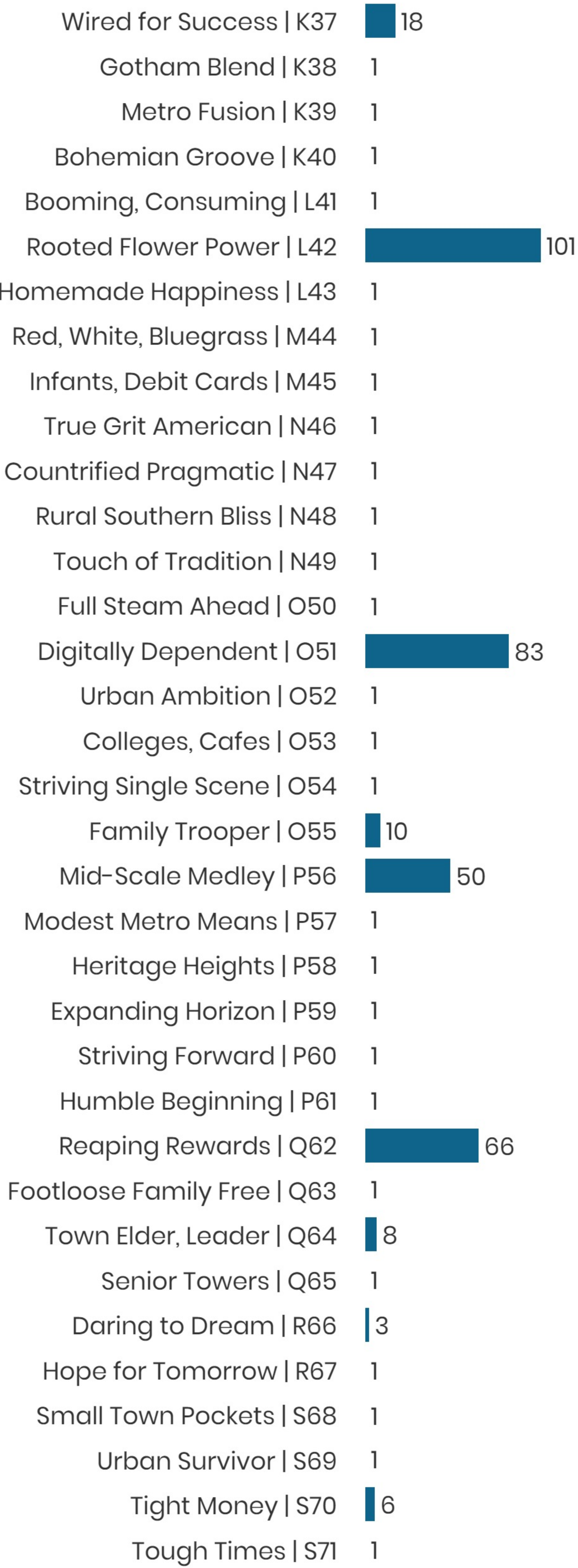


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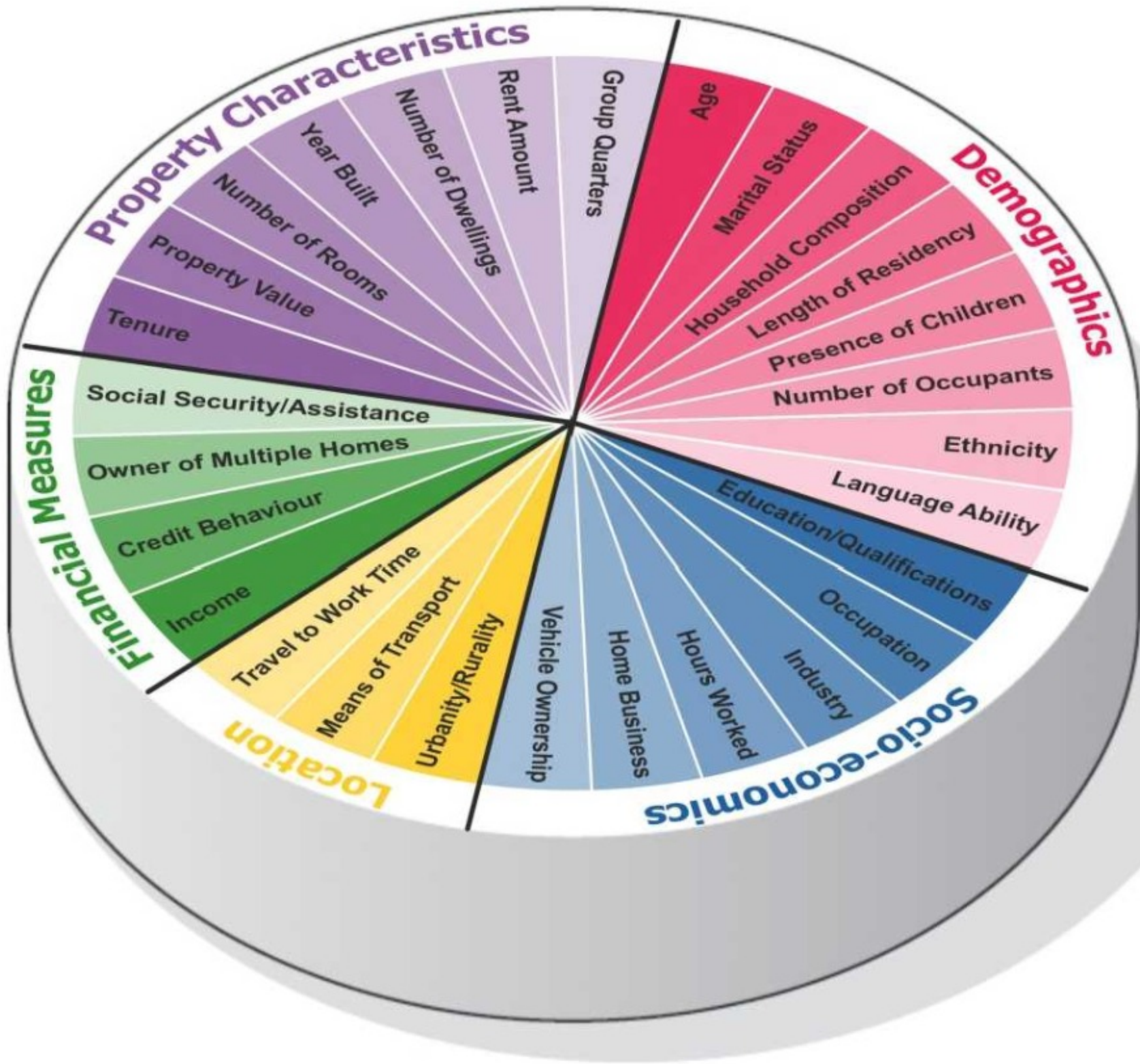
Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of West Bloomfield Township, 2018.

37-71 Lifestyle Clusters | Northwest Quadrant

Households currently living in the northwest quadrant of West Bloomfield Township.

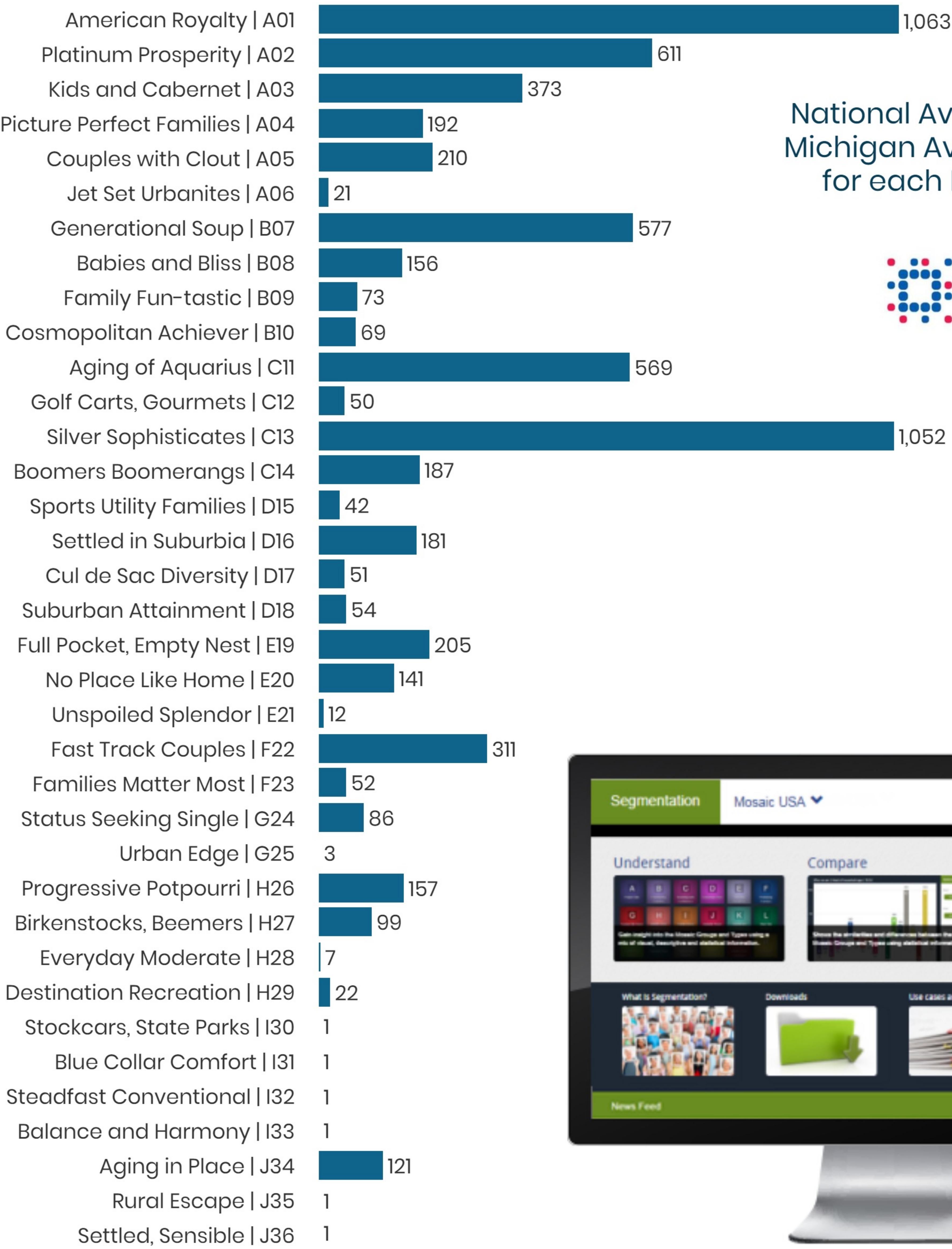


National Average = 2% or less
Michigan State Average = 5% or less
for each Lifestyle Cluster



1-36 Lifestyle Clusters | Southwest Quadrant

Households currently living in the southwest quadrant of West Bloomfield Township.



National Average = 2% or less
Michigan Average = 5% or less
for each Lifestyle Cluster

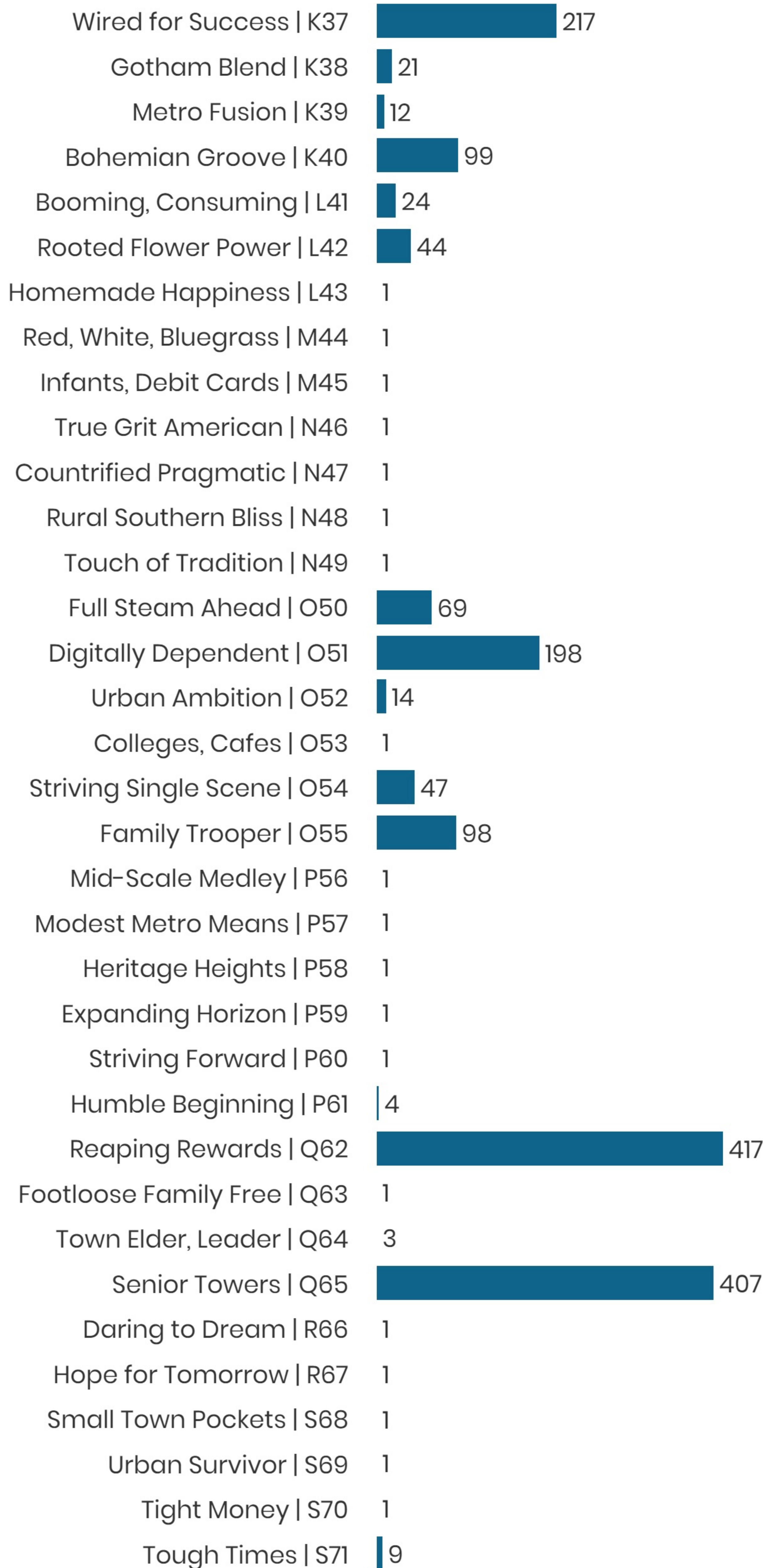


LandUseUSA
UrbanStrategies

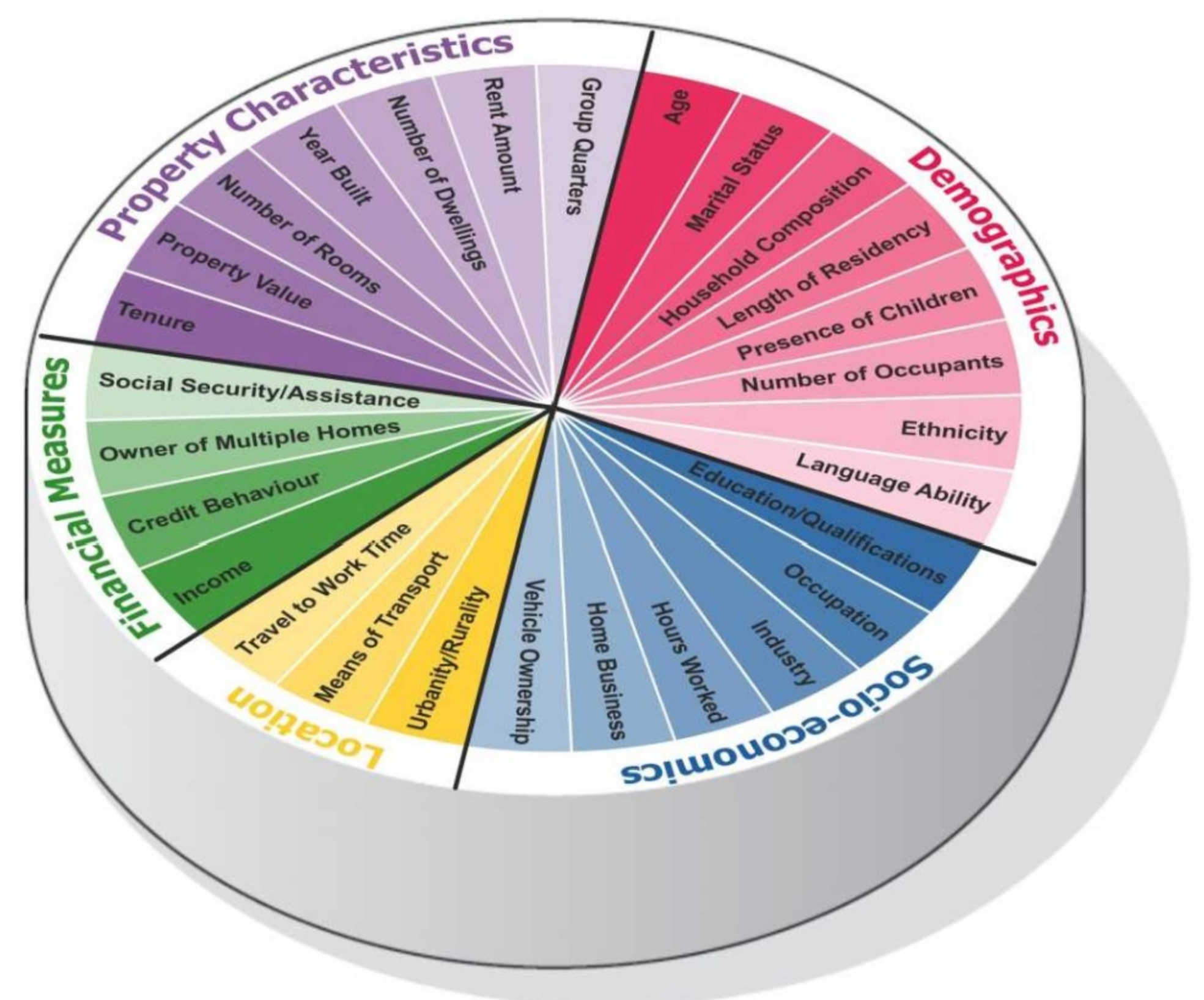
Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of West Bloomfield Township, 2018.

37-71 Lifestyle Clusters | Southwest Quadrant

Households currently living in the southwest quadrant of West Bloomfield Township.



National Average = 2% or less
Michigan State Average = 5% or less
for each Lifestyle Cluster

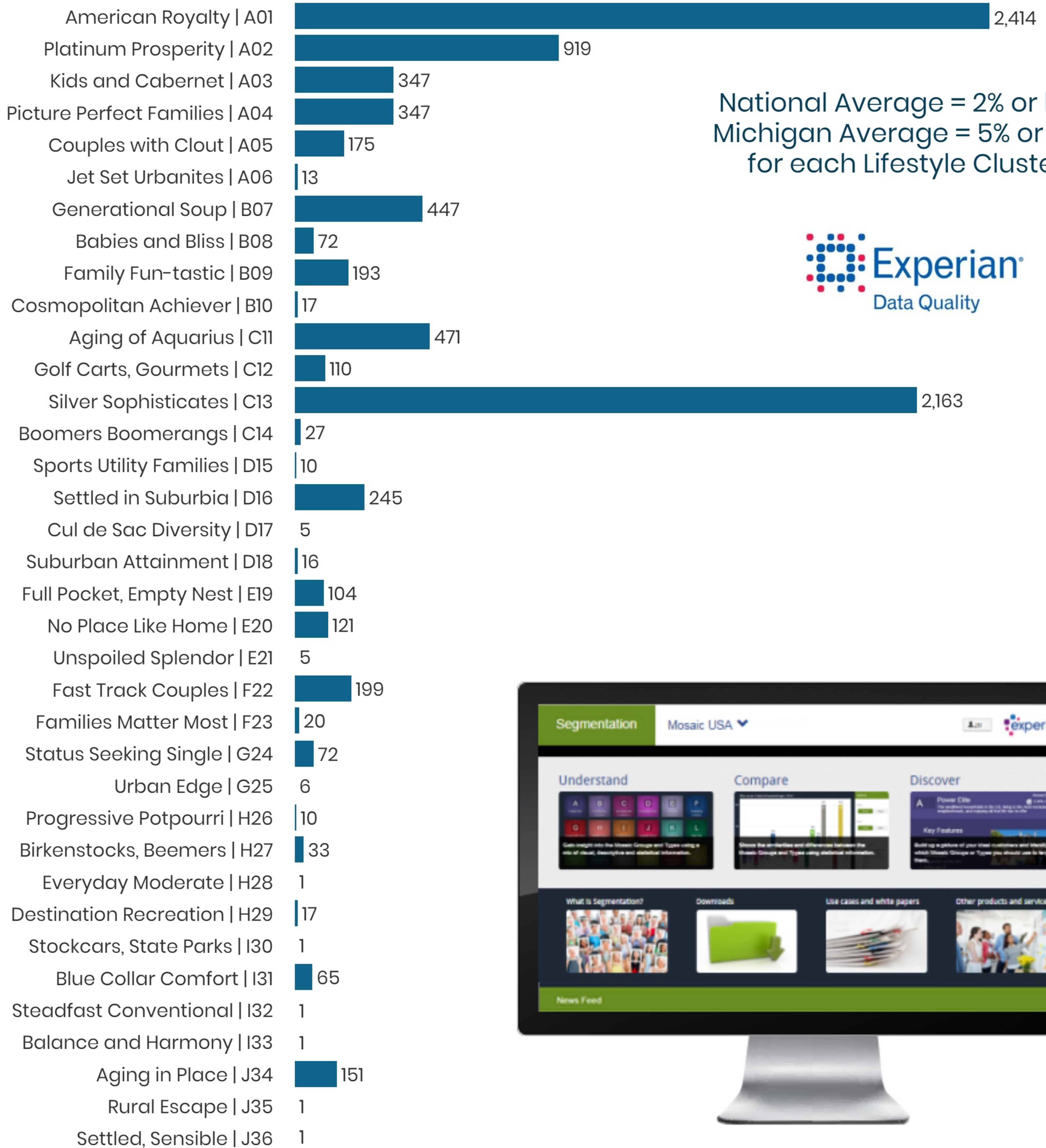


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Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of West Bloomfield Township, 2018.

1-36 Lifestyle Clusters | Southeast Quadrant

Households currently living in the southeast quadrant of West Bloomfield Township.



National Average = 2% or less
Michigan Average = 5% or less
for each Lifestyle Cluster

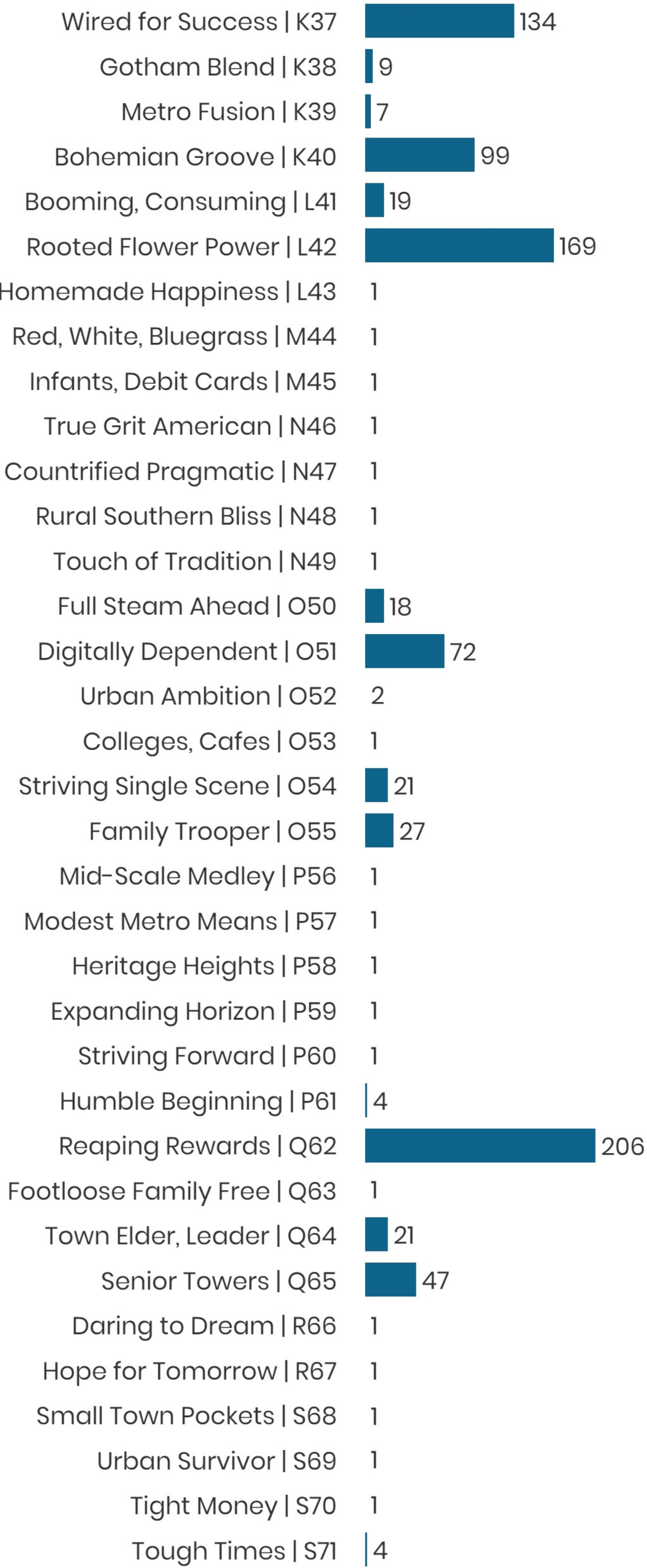


LandUseUSA
UrbanStrategies

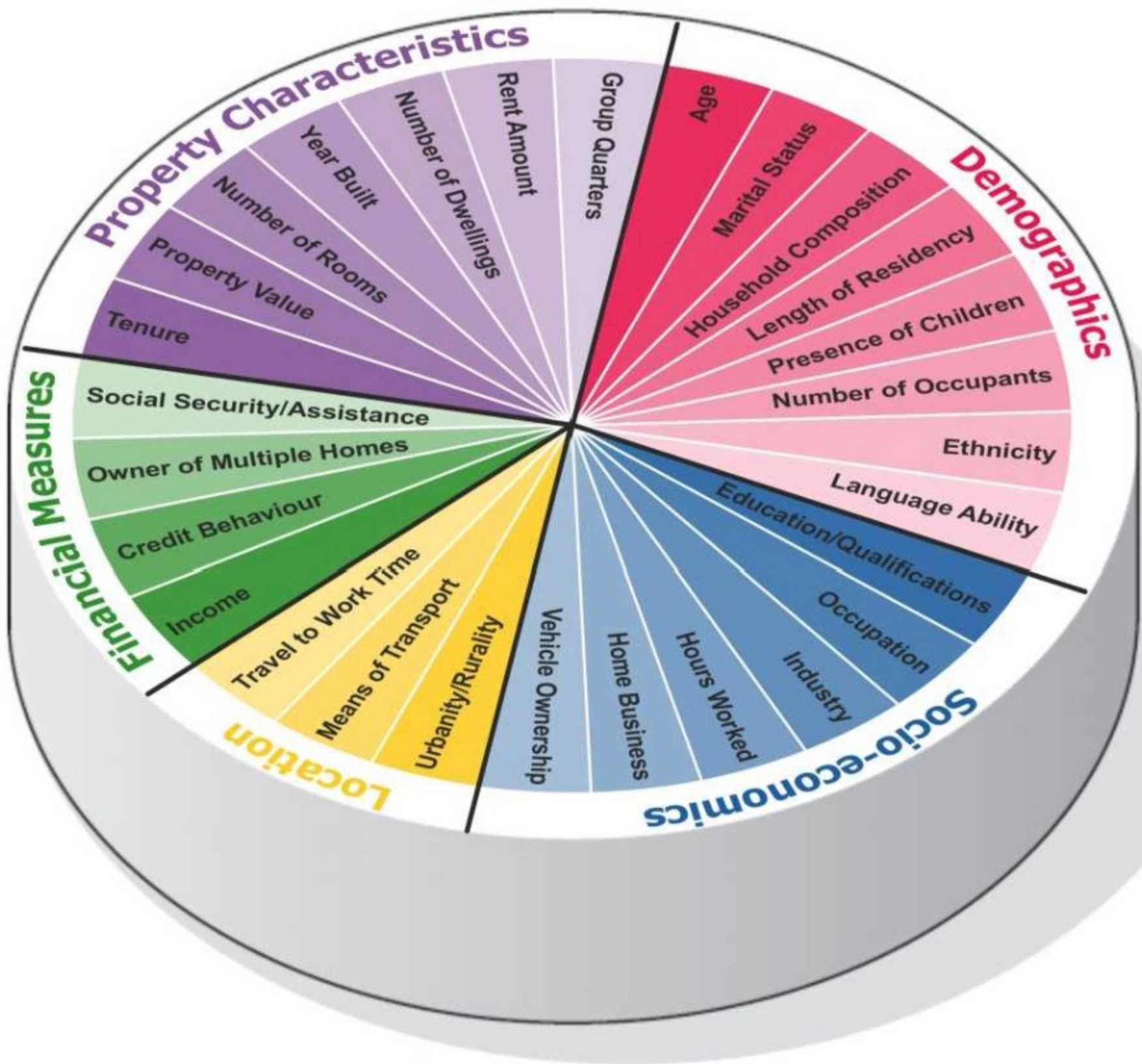
Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of West Bloomfield Township, 2018.

37-71 Lifestyle Clusters | Southeast Quadrant

Households currently living in the southeast quadrant of West Bloomfield Township.

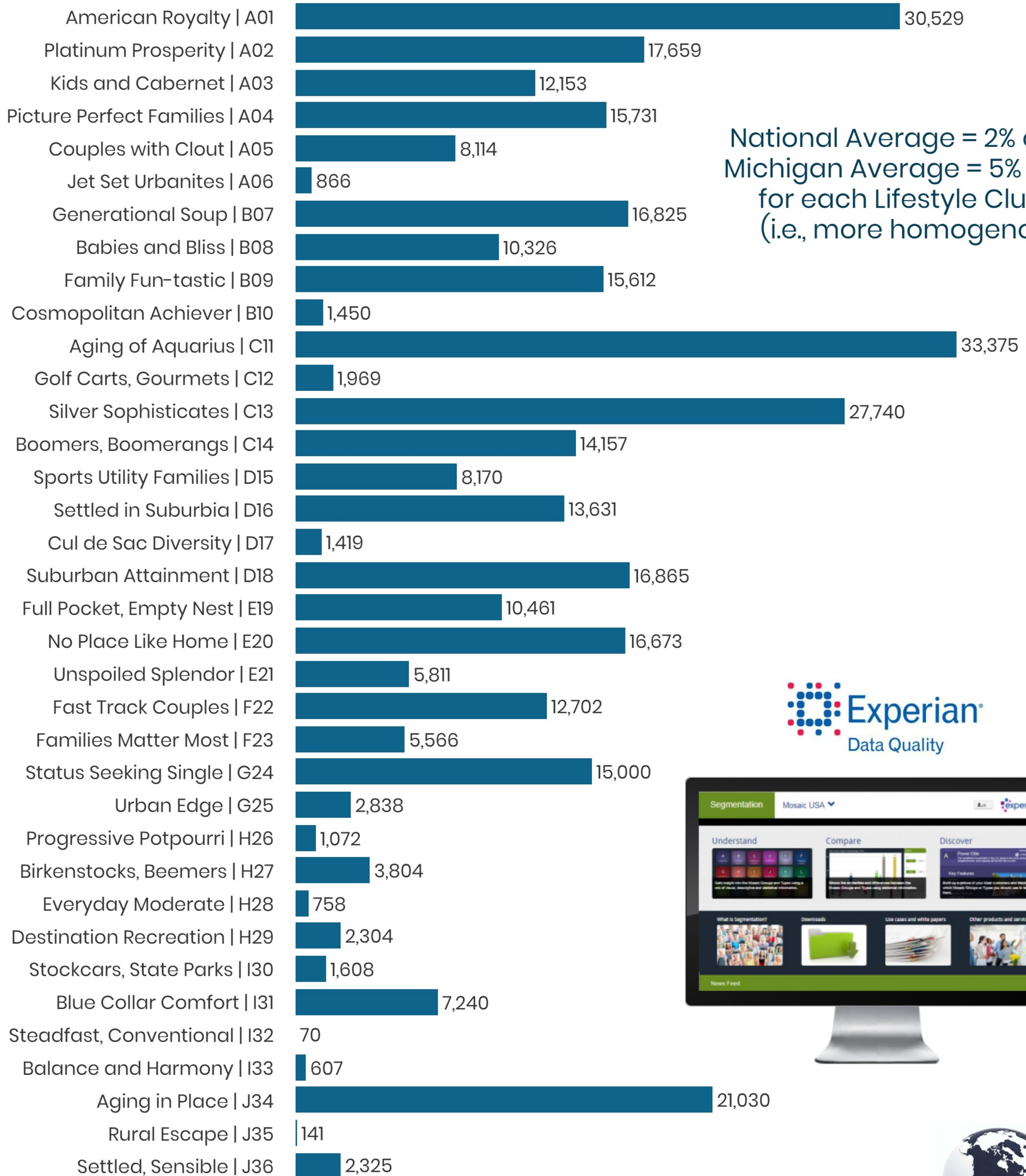


National Average = 2% or less
Michigan State Average = 5% or less
for each Lifestyle Cluster



1-36 Lifestyle Clusters | Oakland County

Established Lifestyle Clusters | Number of households currently living in the county.



National Average = 2% or less
Michigan Average = 5% or less
for each Lifestyle Cluster
(i.e., more homogenous)

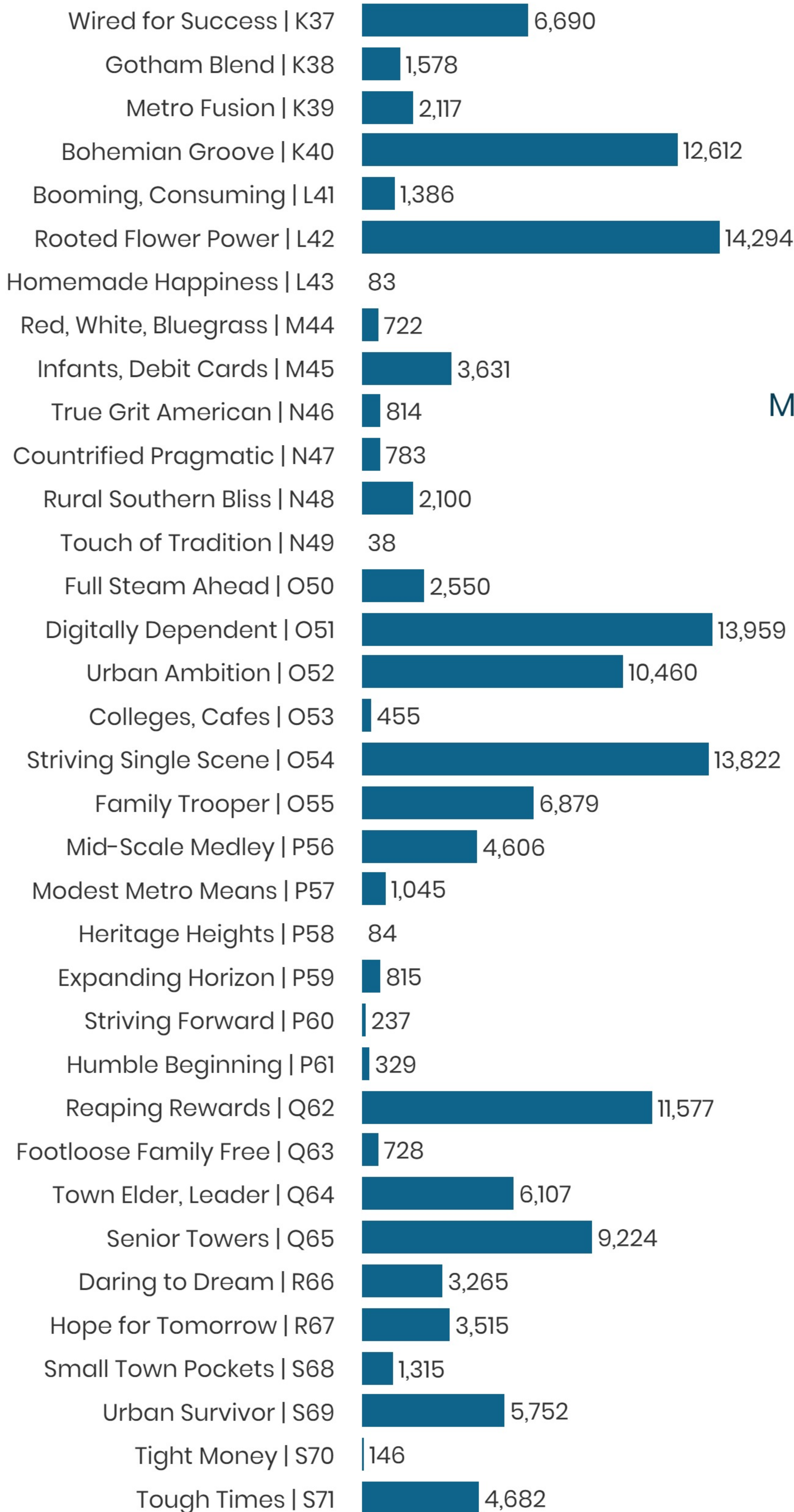


Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of West Bloomfield Township, 2018.

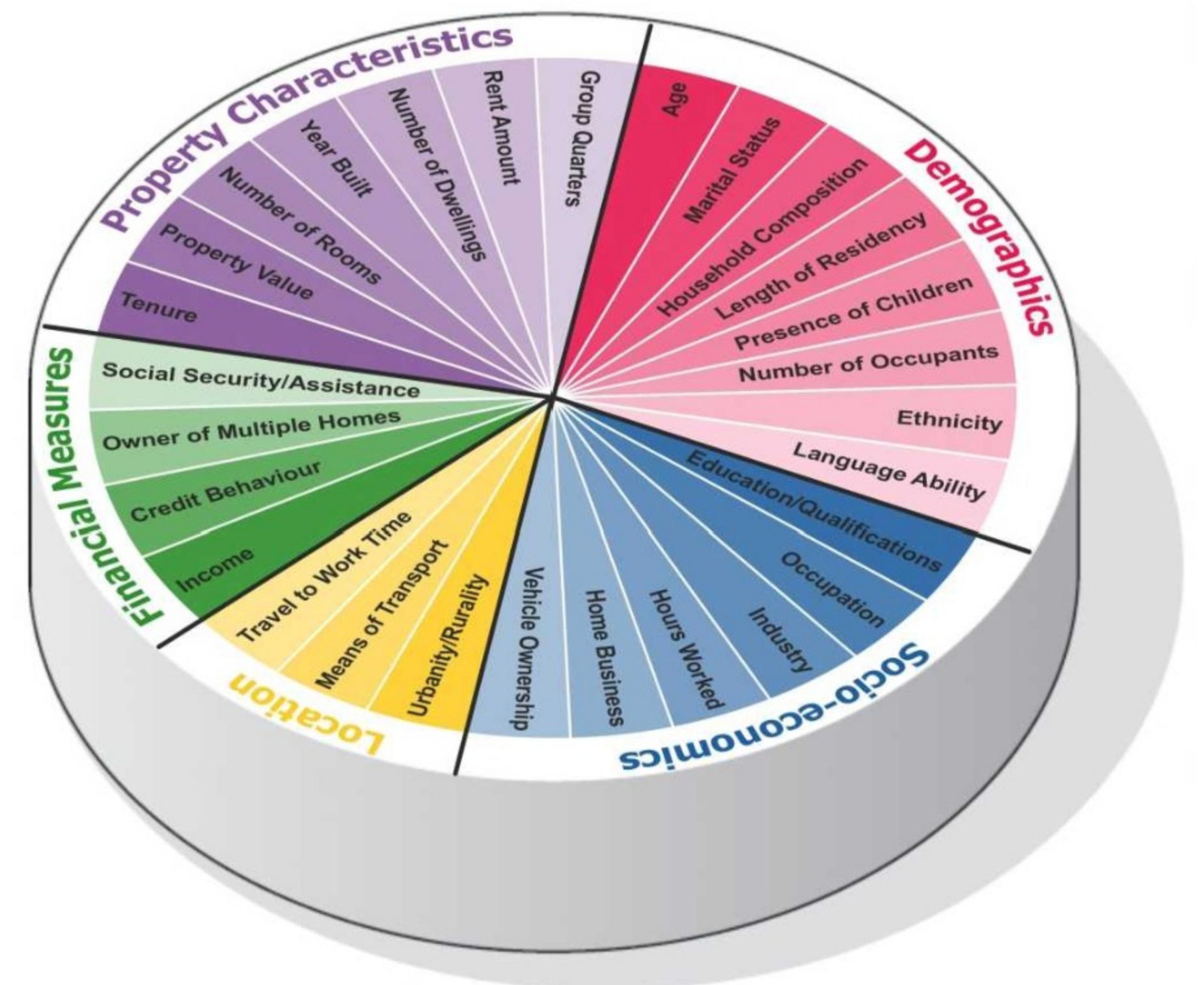
LandUseUSA
UrbanStrategies

37-71 Lifestyle Clusters | Oakland County

Established Lifestyle Clusters | Number of households currently living in the county.

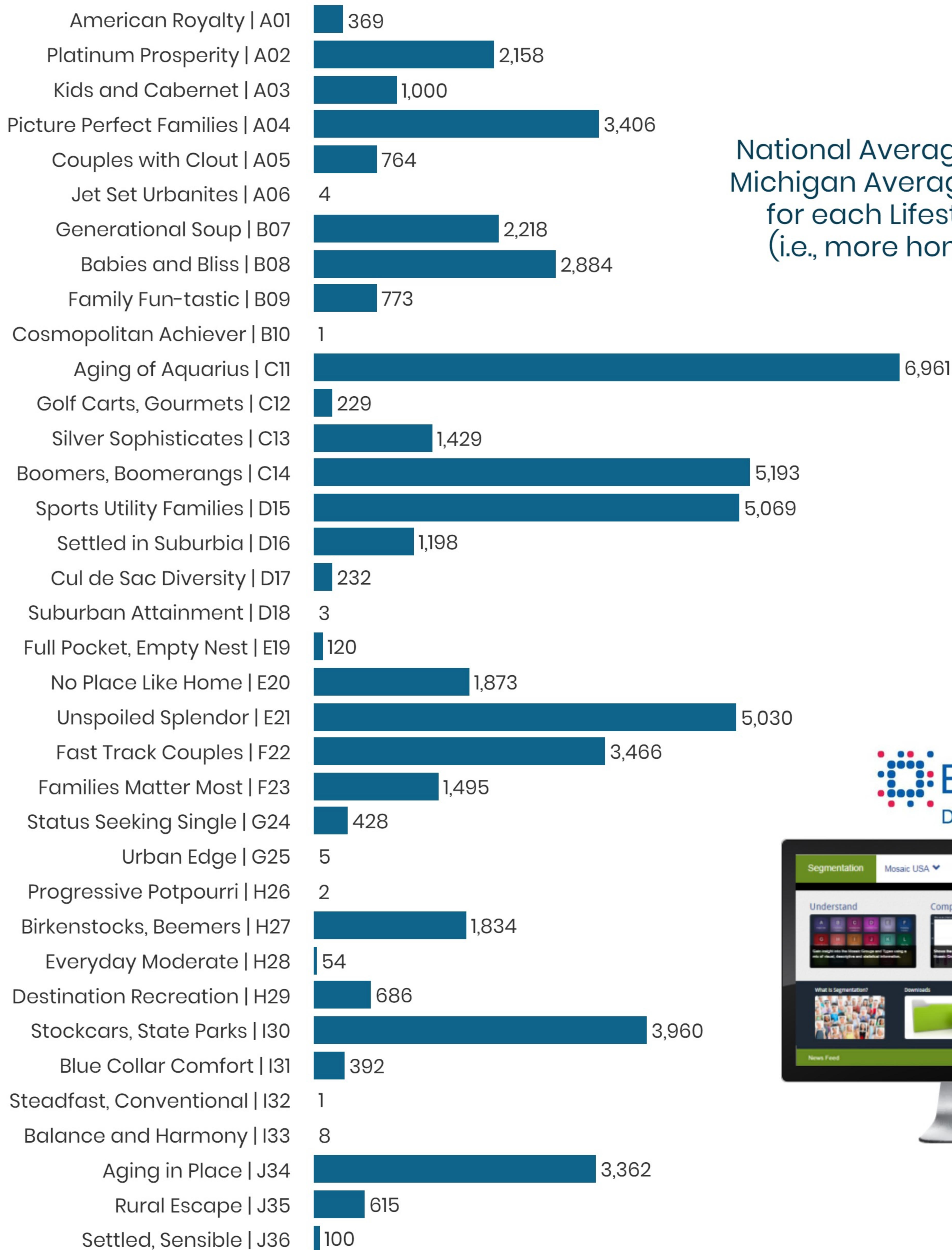


National Average = 2% or less
Michigan State Average = 5% or less
for each Lifestyle Cluster
(i.e., more homogenous)



1-36 Lifestyle Clusters | Livingston County

Established Lifestyle Clusters | Number of households currently living in the county.



National Average = 2% or less
Michigan Average = 5% or less
for each Lifestyle Cluster
(i.e., more homogenous)

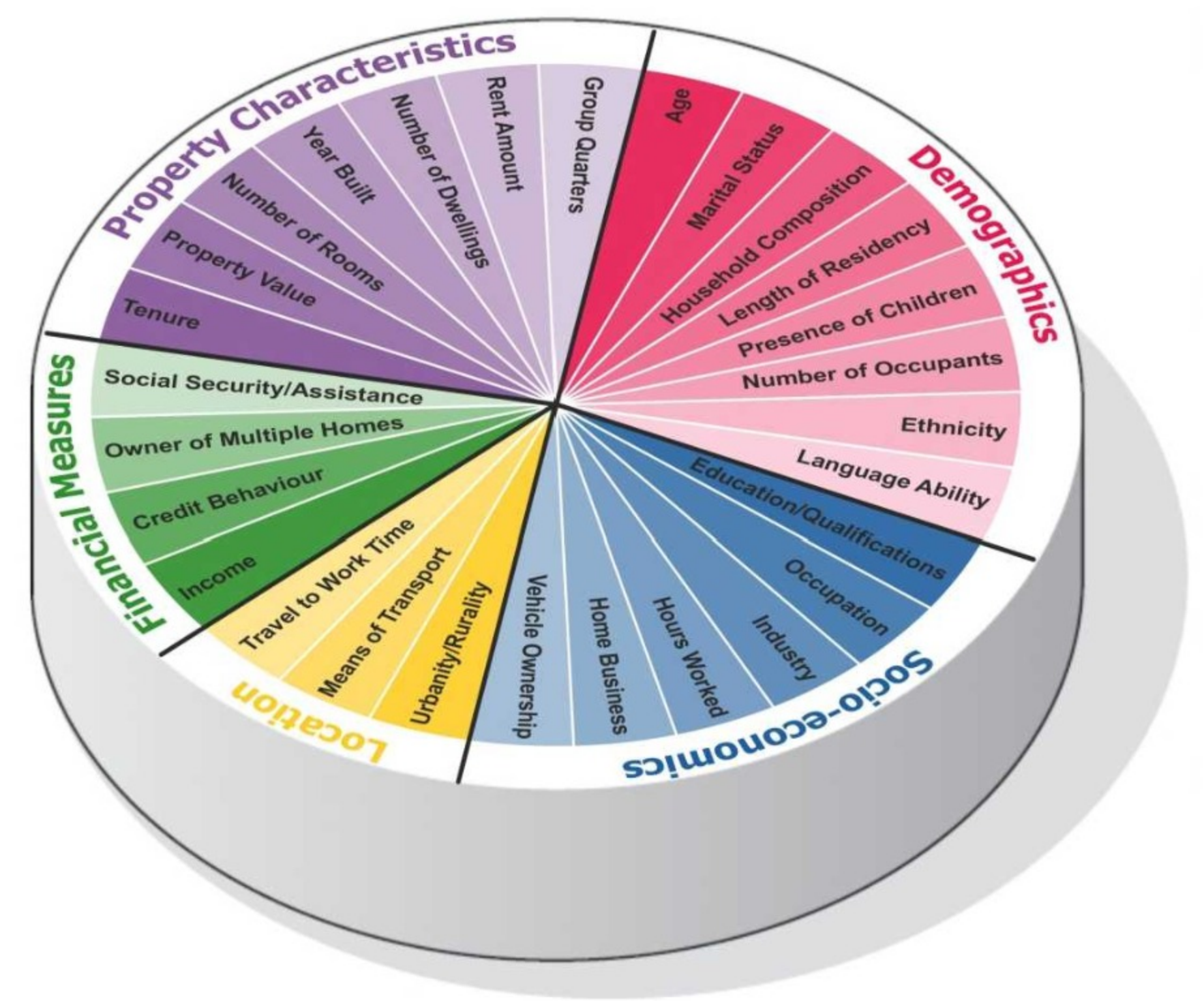
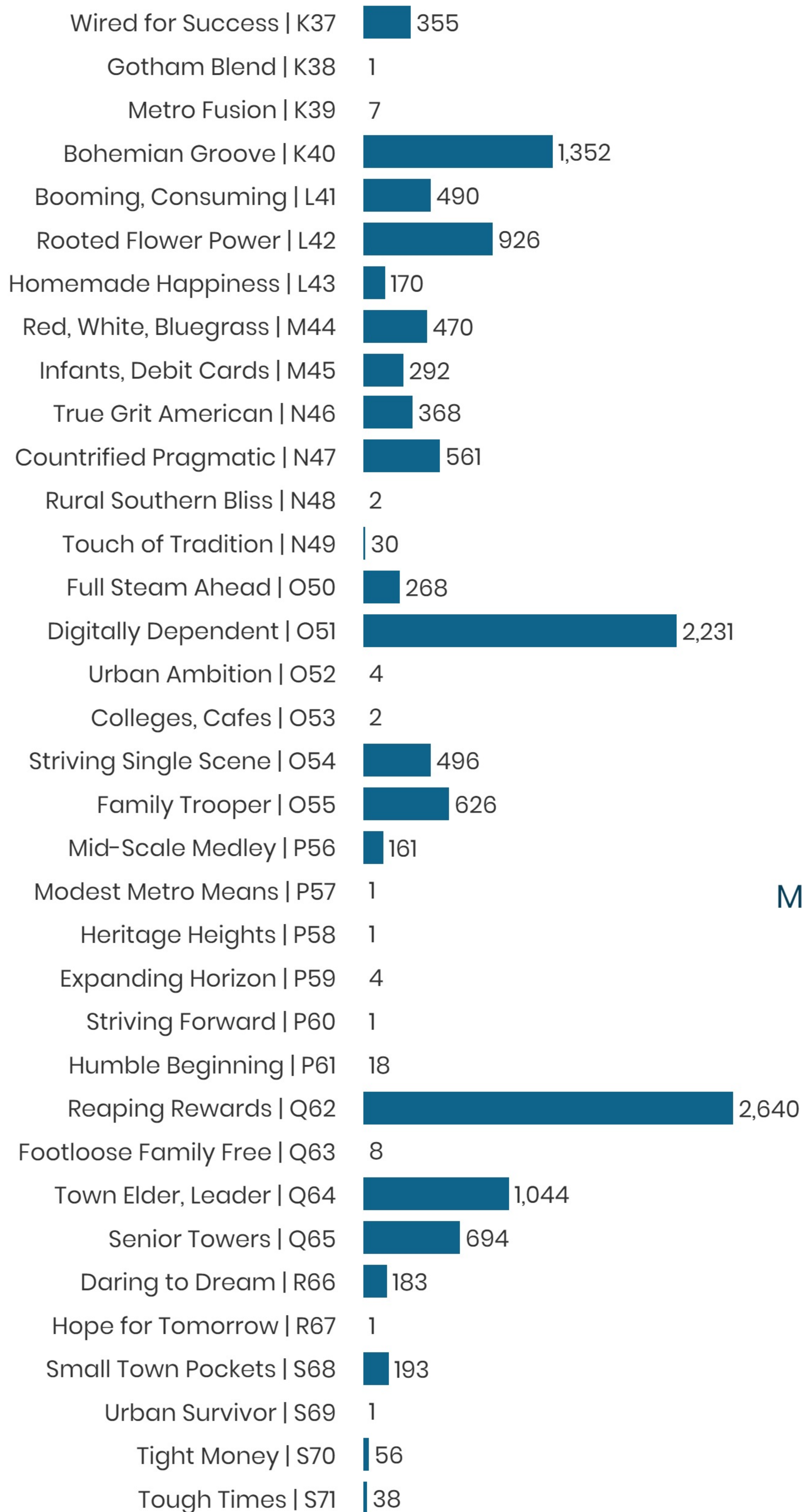


Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of West Bloomfield Township, 2018.

LandUseUSA
UrbanStrategies

37-71 Lifestyle Clusters | Livingston County

Established Lifestyle Clusters | Number of households currently living in the county.



National Average = 2% or less
Michigan State Average = 5% or less
for each Lifestyle Cluster
(i.e., more homogenous)



LandUseUSA
UrbanStrategies

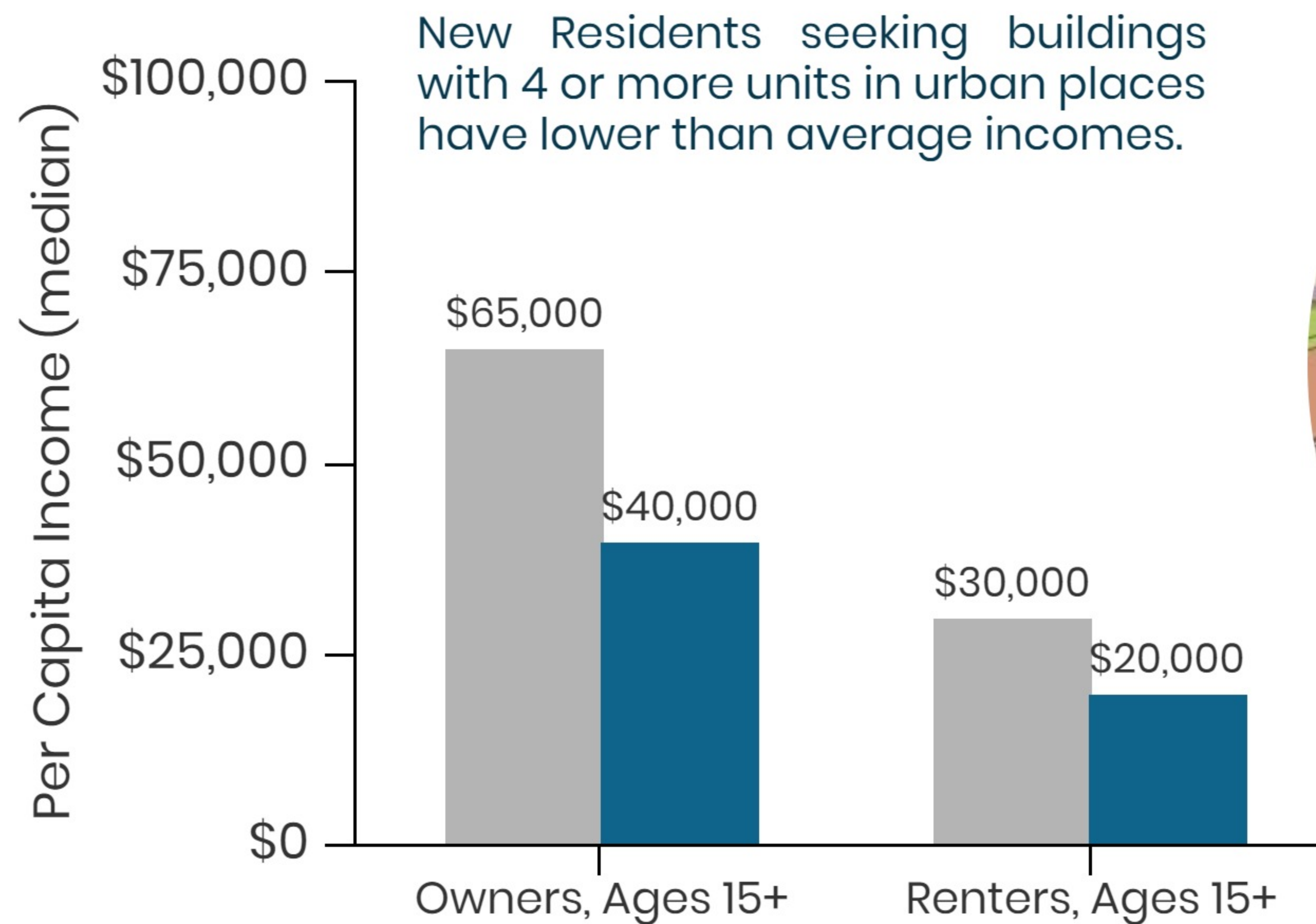
Section D

Target Market Profiles

Movership Rates | MICHIGAN

Average movership rates and household incomes for the State of Michigan.

Per Capita Income, Movers Ages 15+ Existing v. New Residents



- Moving Within - All building formats.
- In-Migration - Seeking buildings with four or more units in urban places.

Income of Migrating Households – Housing affordability, attainability, and tolerance are important topics that must be addressed within each unique place. Measures of affordability are usually aligned with HUD’s Low-Moderate-Income (LMI) standards, with parameters for 80% or less of Area Median Income (AMI). Attainability softens the rules to include units that are priced just below, at, or slightly above market rates. Tolerance recognizes that shifts in supply and demand can result in price jumps that residents might tolerate – even if they are overburdened by HUD’s standards.

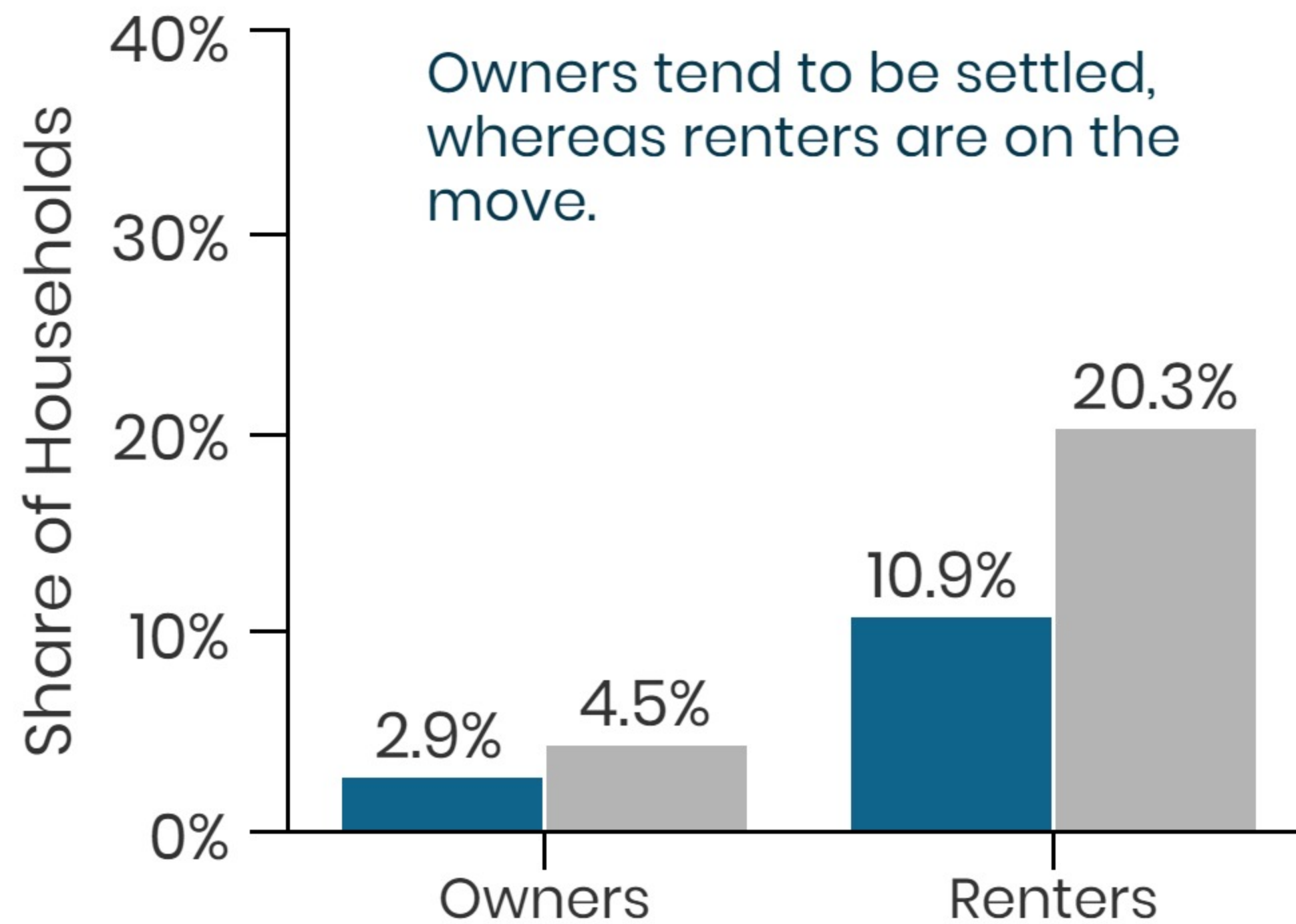
Regardless of these varying standards, migrating renters tend to have half the income of owners. Furthermore, new residents (and households) migrating into Michigan have lower incomes than those who are established. Statewide, there is a need for more income-integrated choices across all building formats, including townhouses or high-rise lofts that are traditionally marketed as “luxury” units.



Movership Rates | MICHIGAN

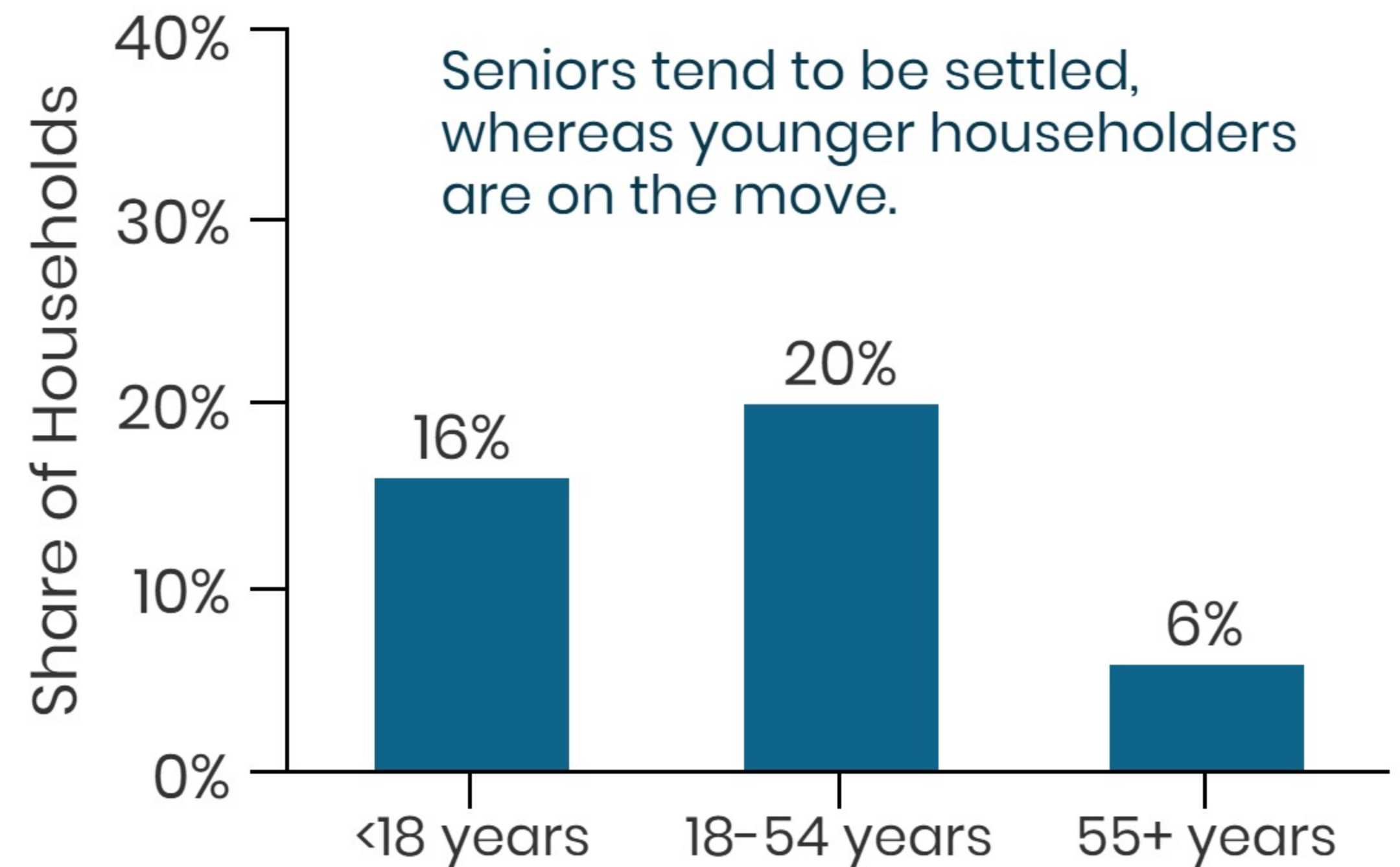
Average movership rates by tenure and age for the State of Michigan.

Household Movership Rates by Tenure



- In-Migration of New Households
- Movership of Existing Households

Household Movership Rates by Age Bracket*



*For the Head of the Household

Movership by Tenure – Renters are four times more likely to move than home owners. Home owners are more inclined to choose detached houses in rural settings, and they tend to be quite settled. Migrating renters across Michigan will turn over the existing rental stock every 3 years. In comparison, it will take at least 7 years for migrating home owners to turn over the stock among detached houses. Said another way, it is renters who generate most of the market potential for the development of attached units in urban places. Caution is recommended against over-planning and over-building attached formats (like new townhouses and lofts) for owner-occupied households, unless they are clearly supported by market demand.

Movership by Origin – About half of all households moving in Michigan each year are actually new residents for the state; and the other half are moving from one address to another within the state. In any given year, almost 11% of all renters have migrated into Michigan from other states; and over 20% have moved within (unadjusted for out-migration). In-migration is used as a basis for calculating the minimum market potential (the “conservative scenario”). In comparison, total migration (in-migration plus internal migration) should only be used to estimate the maximum market potential (the “aggressive scenario”).

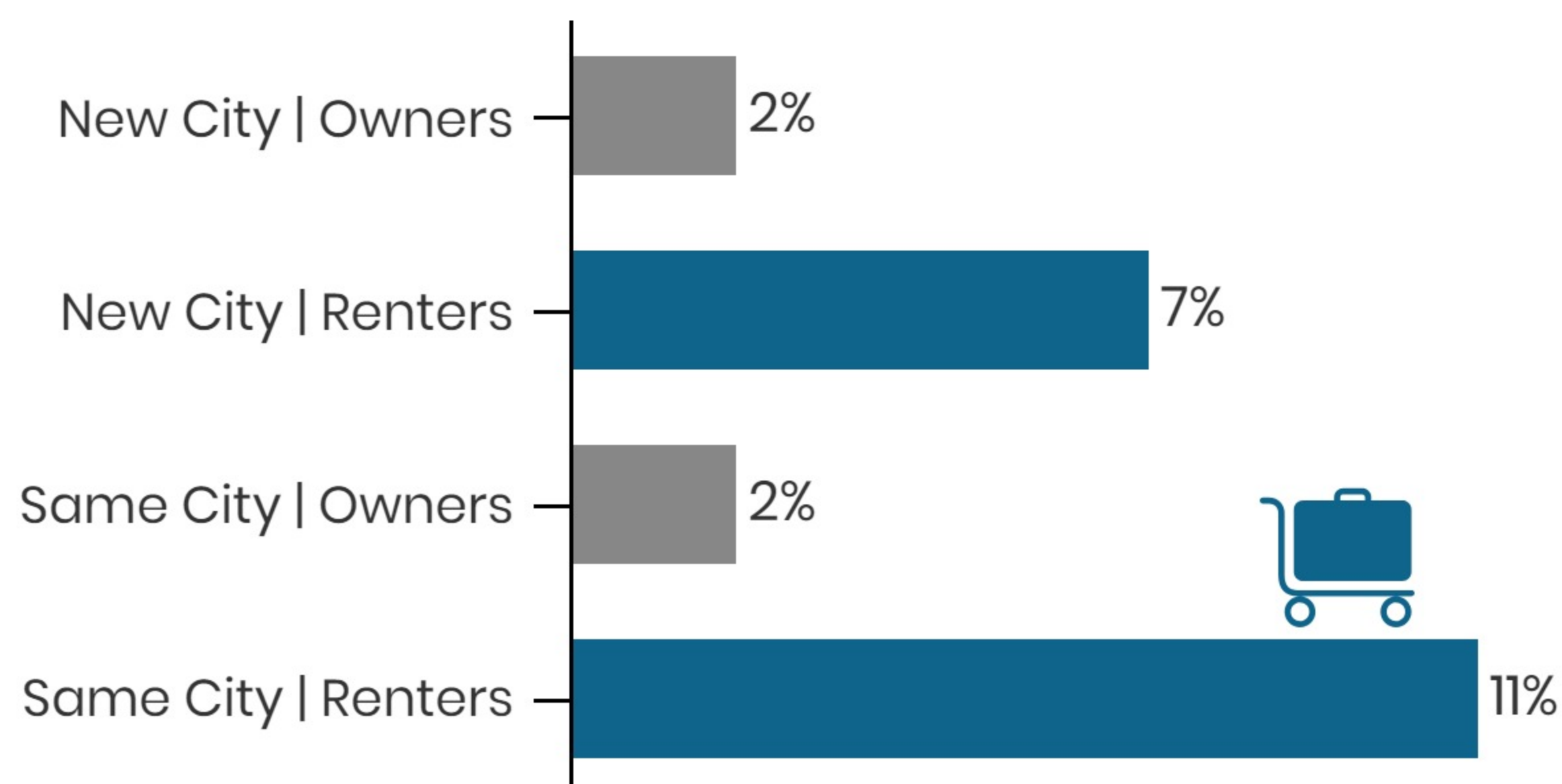
Movership by Age – Stakeholder discussions about housing often gravitate toward the topic of Michigan’s aging residents. The theory is that senior households are gaining as a share of total, and that they are seeking low-maintenance “age in place” formats like patio homes, courtyard cottages, and townhouses. In reality, seniors still represent a relatively small group; and they tend to be very settled in their detached houses.

Only 6% of all senior-headed households move each year, compared to 20% among younger households. Used as a basis for calculating market gaps, the data consistently shows that the need for new “age in place” choices is relatively small. Instead of building new senior developments, there is a greater need to improve and modifying existing houses to be barrier-free; deliver new services to seniors in their existing homes; and build new formats that appeal to single renters of all ages.

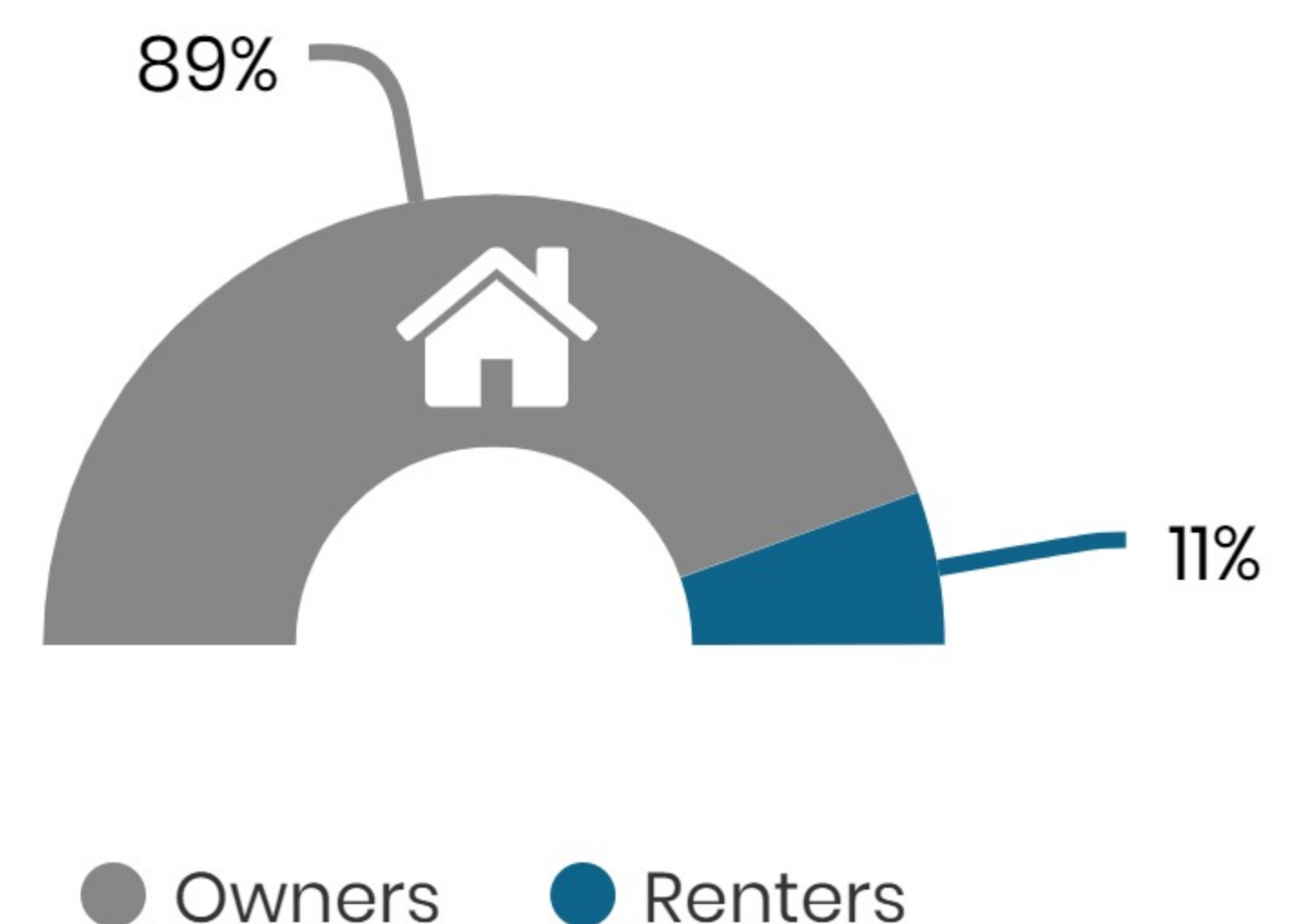
Golf Carts, Gourmets | C12

Lifestyles and Housing Preferences | Michigan Averages

Average Annual Movership Rates



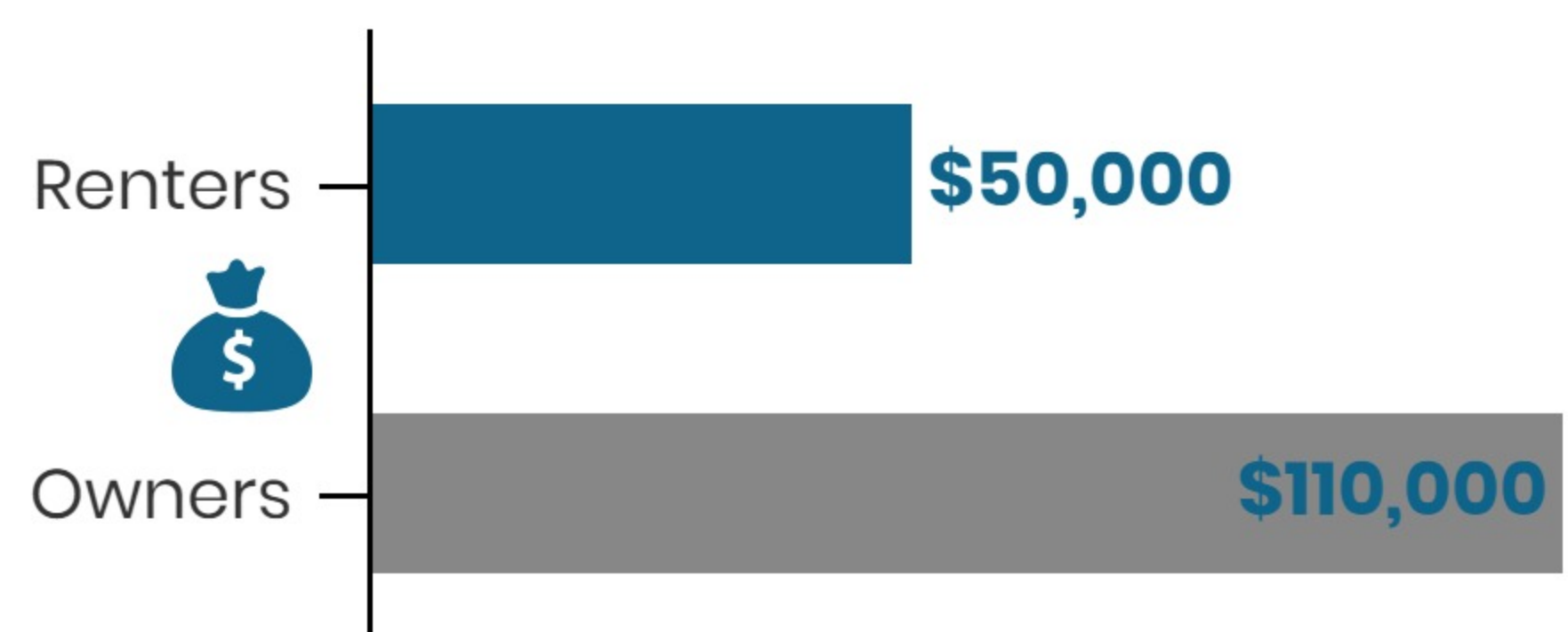
Average Tenure



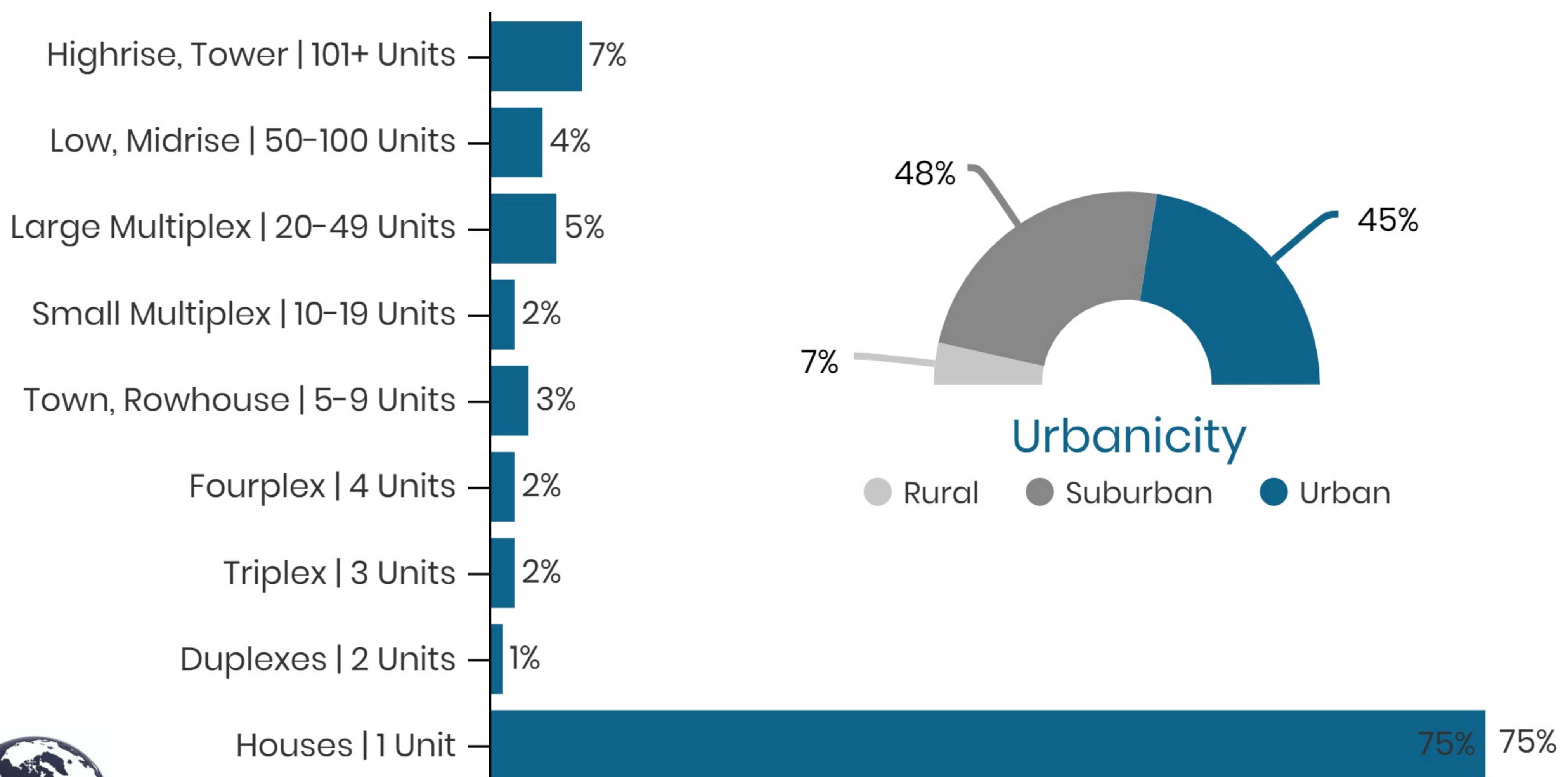
Inclination for Newer Units



Median Household Income



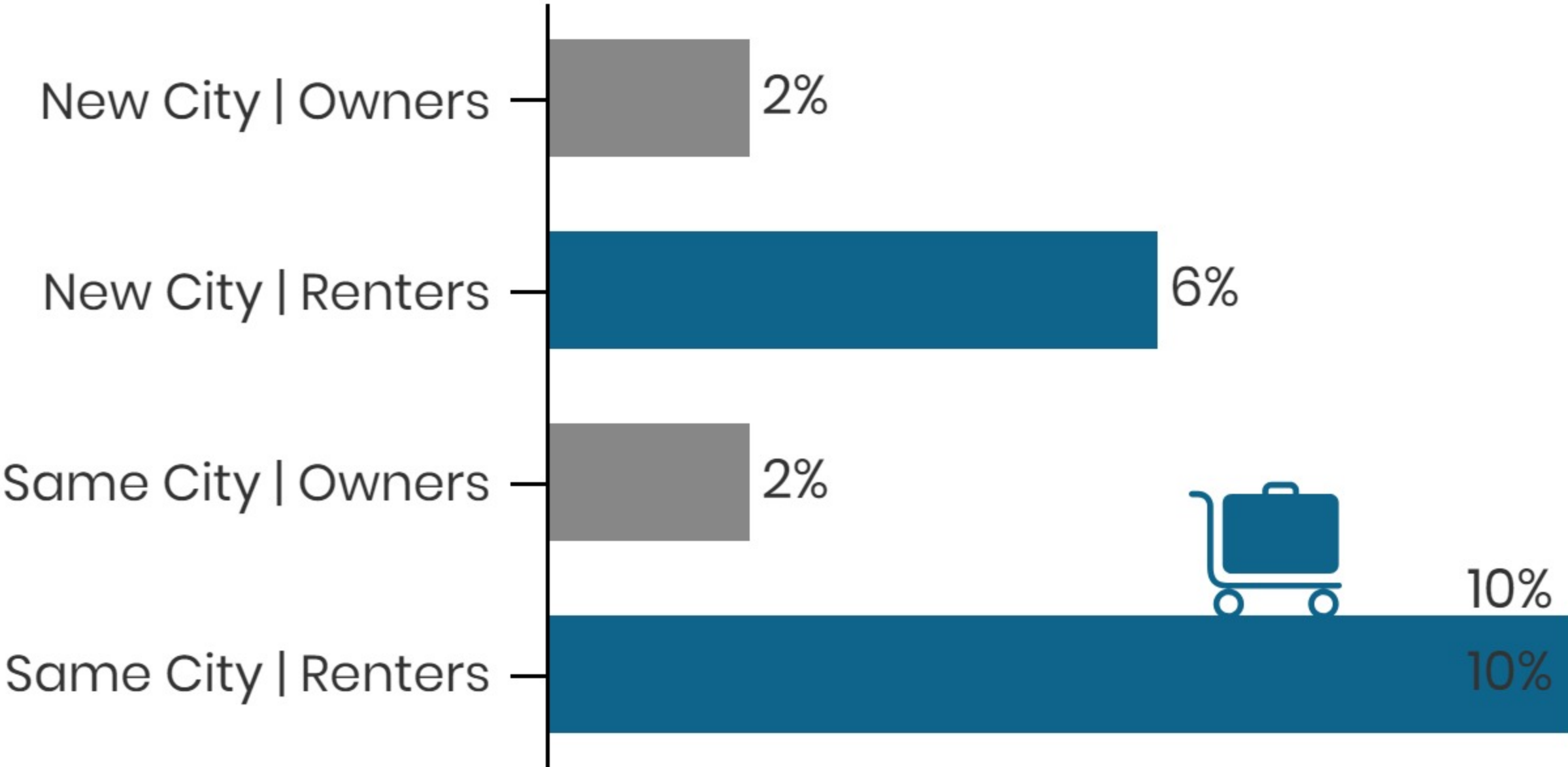
Inclination for Units by Building Size and Urbanicity



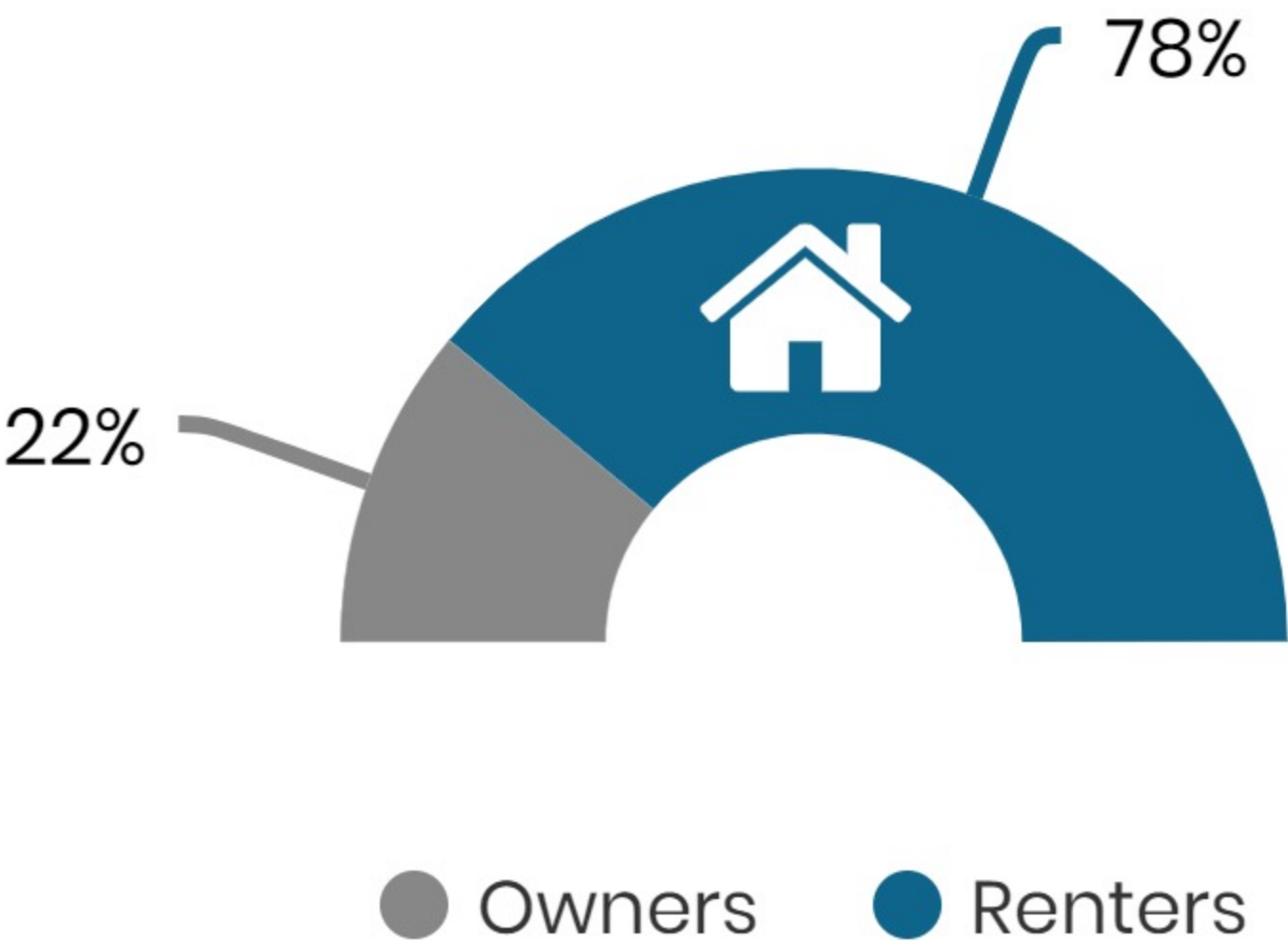
Full Pockets, Empty Nests | E19

Lifestyles and Housing Preferences | Michigan Averages

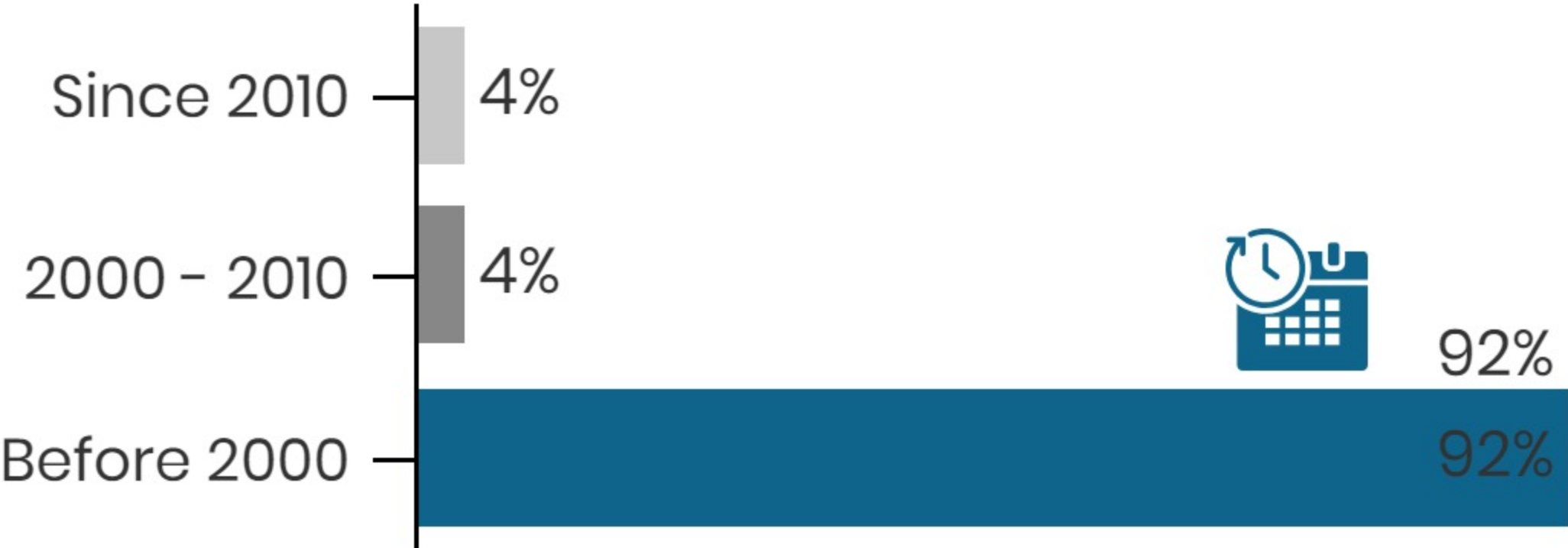
Average Annual Movership Rates



Average Tenure



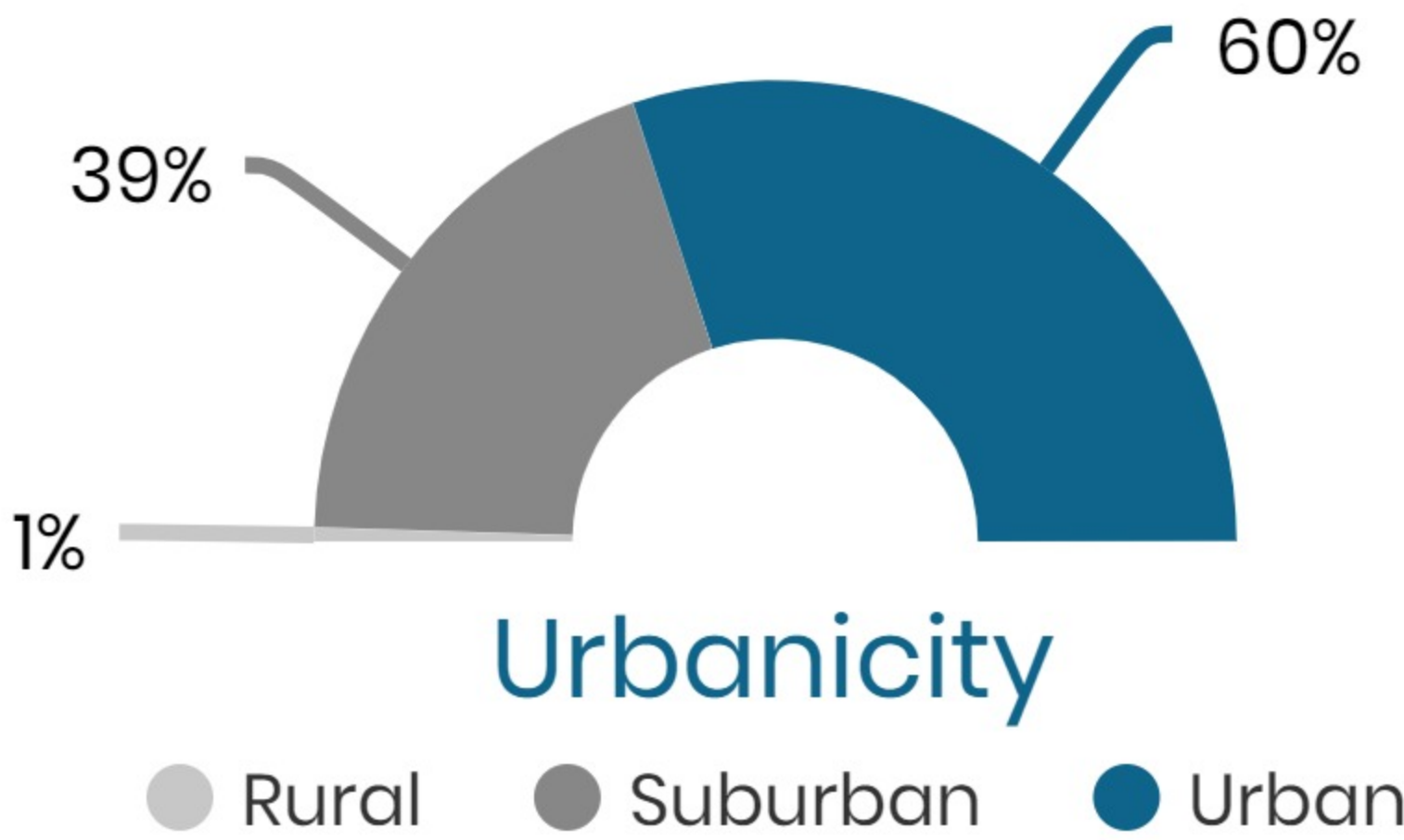
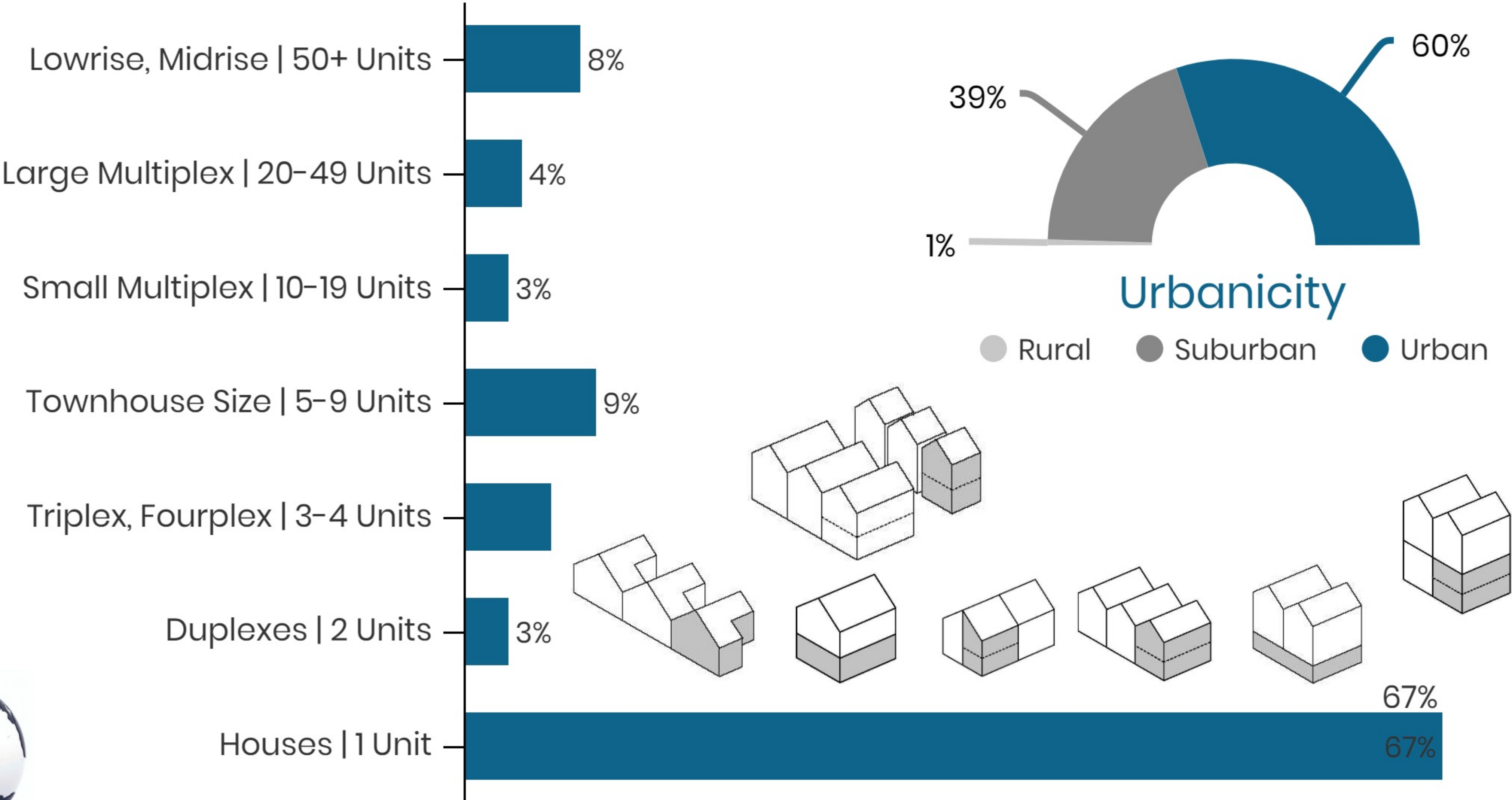
Inclination for Units by Decade Built



Median Household Income



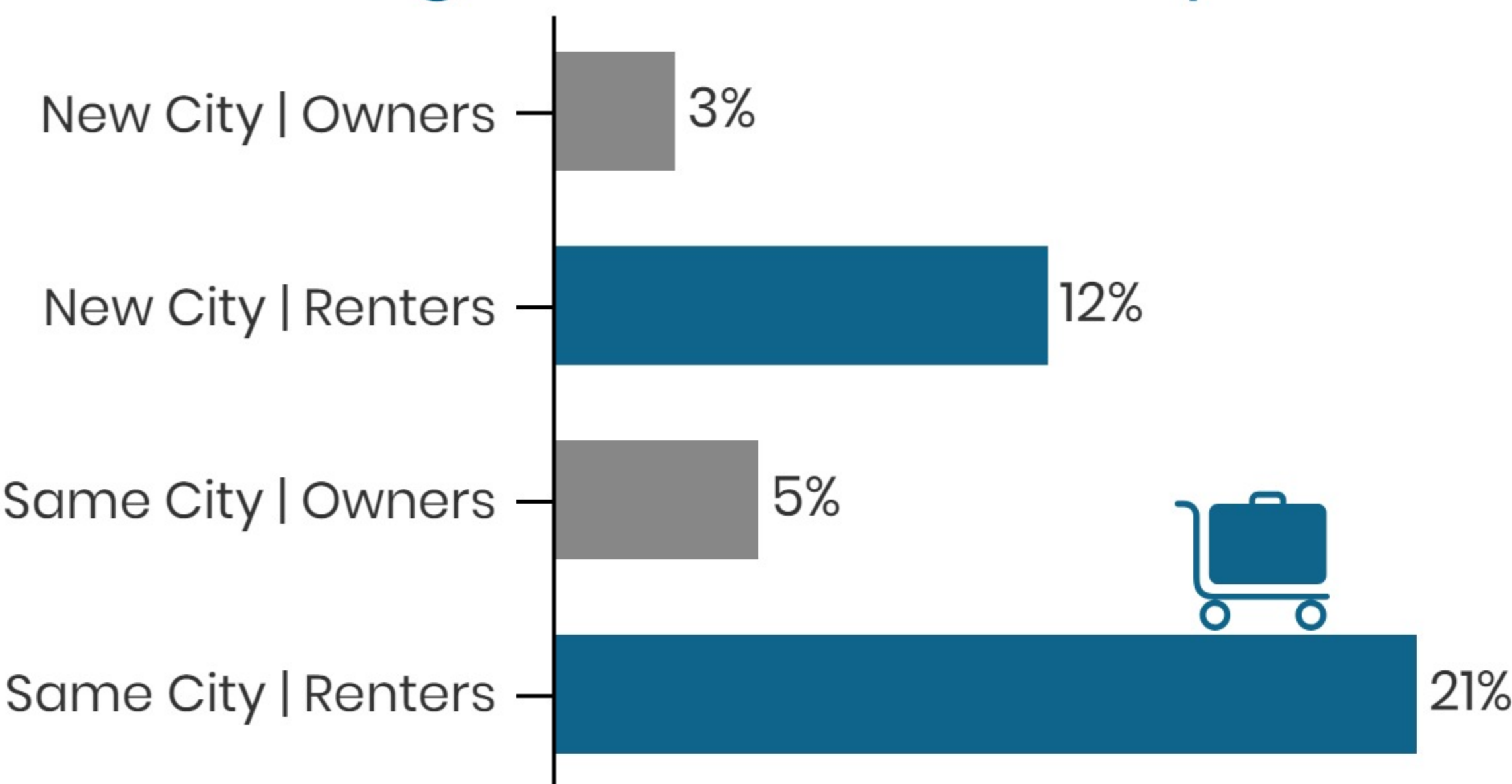
Inclination for Units by Building Size



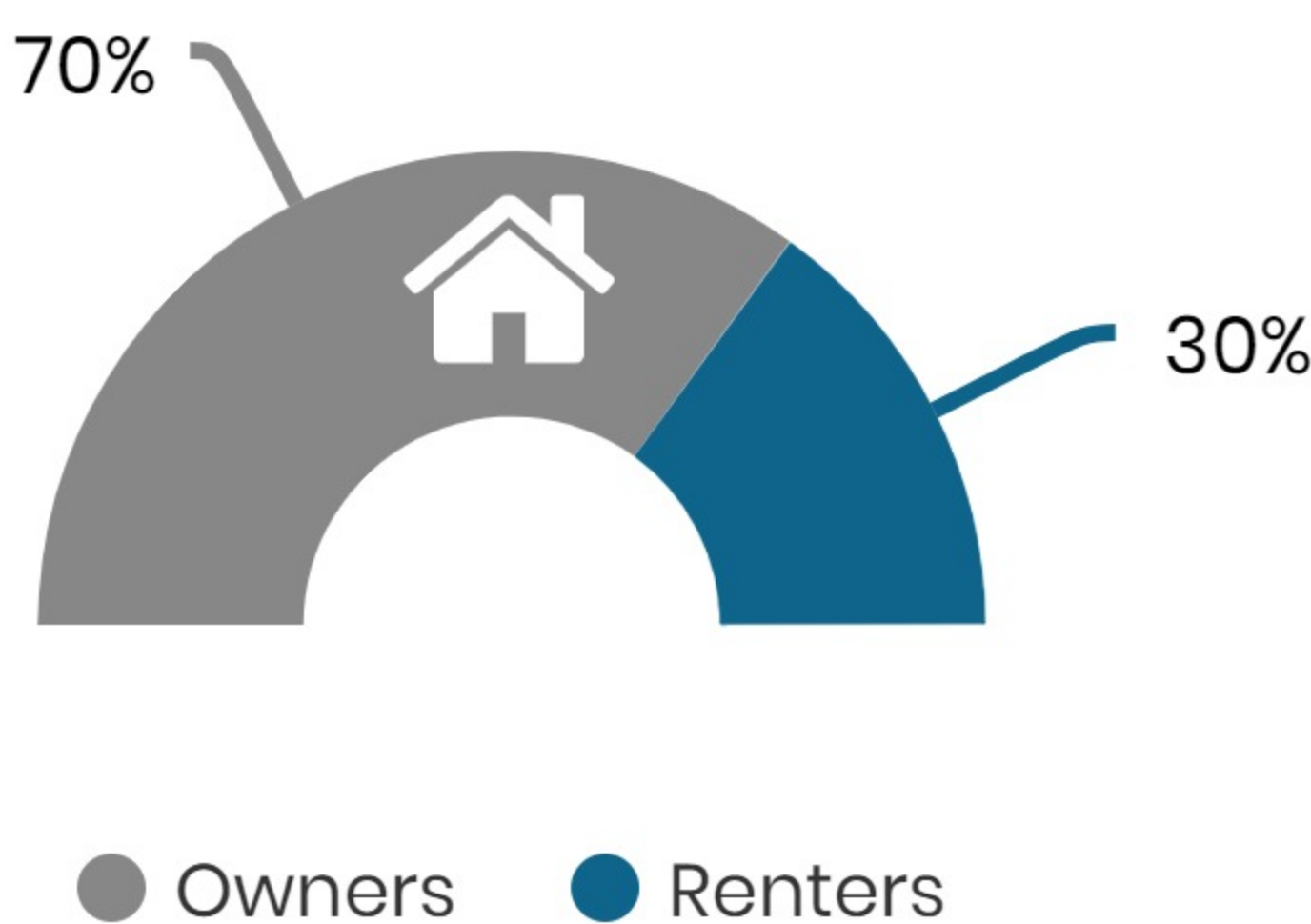
Status Seeking Singles | G24

Lifestyles and Housing Preferences | Michigan Averages

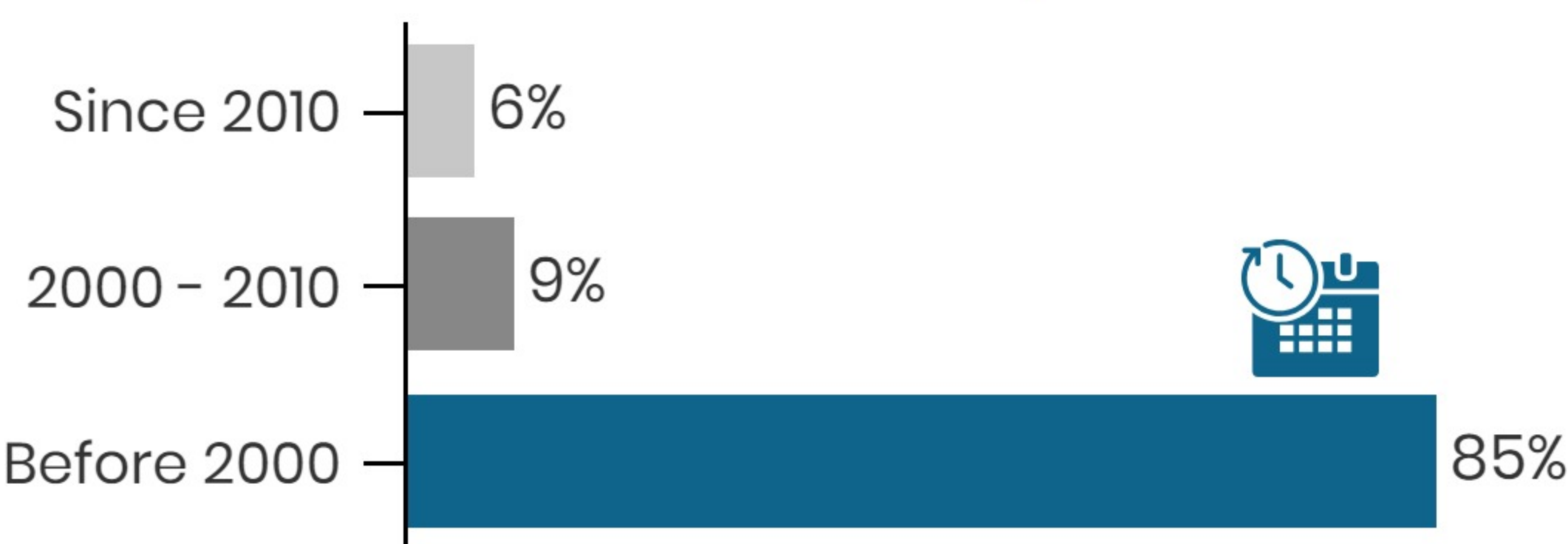
Average Annual Movership Rates



Average Tenure



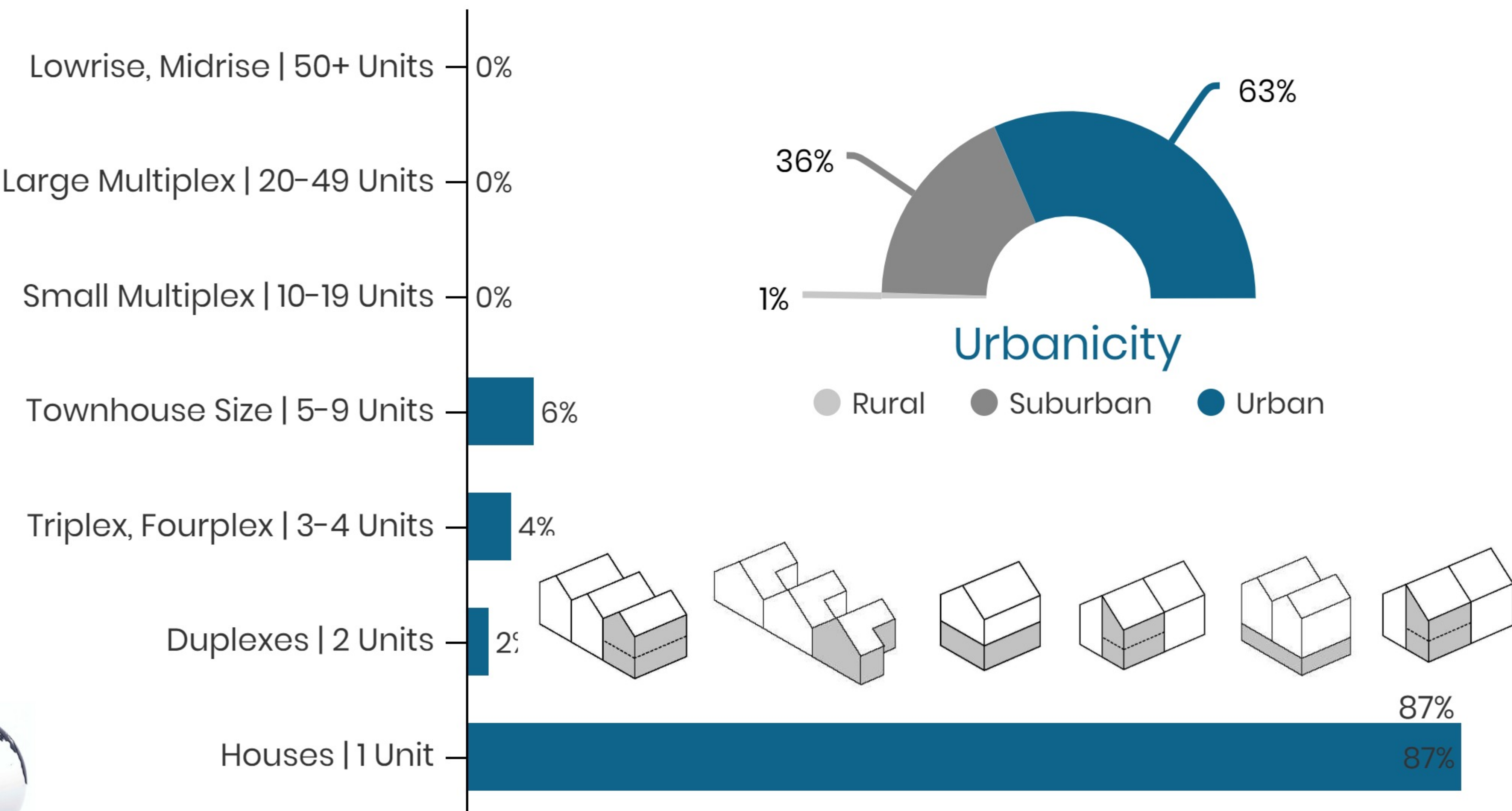
Inclination for Units by Decade Built



Median Household Income



Inclination for Units by Building Size



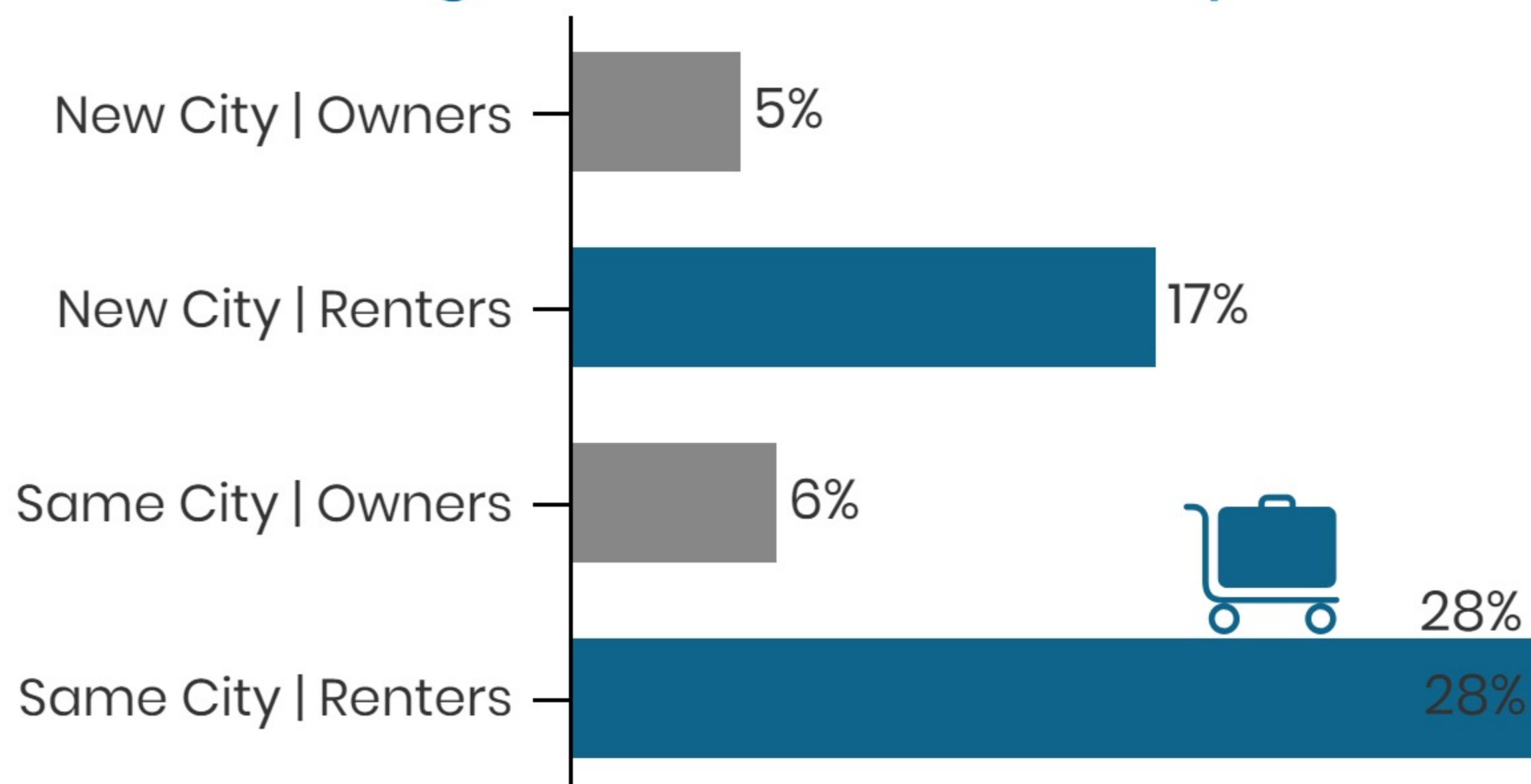
LandUseUSA
UrbanStrategies

Source: Underlying data by Experian Decision Analytics; exhibit and analysis by LandUseUSA © 2019.

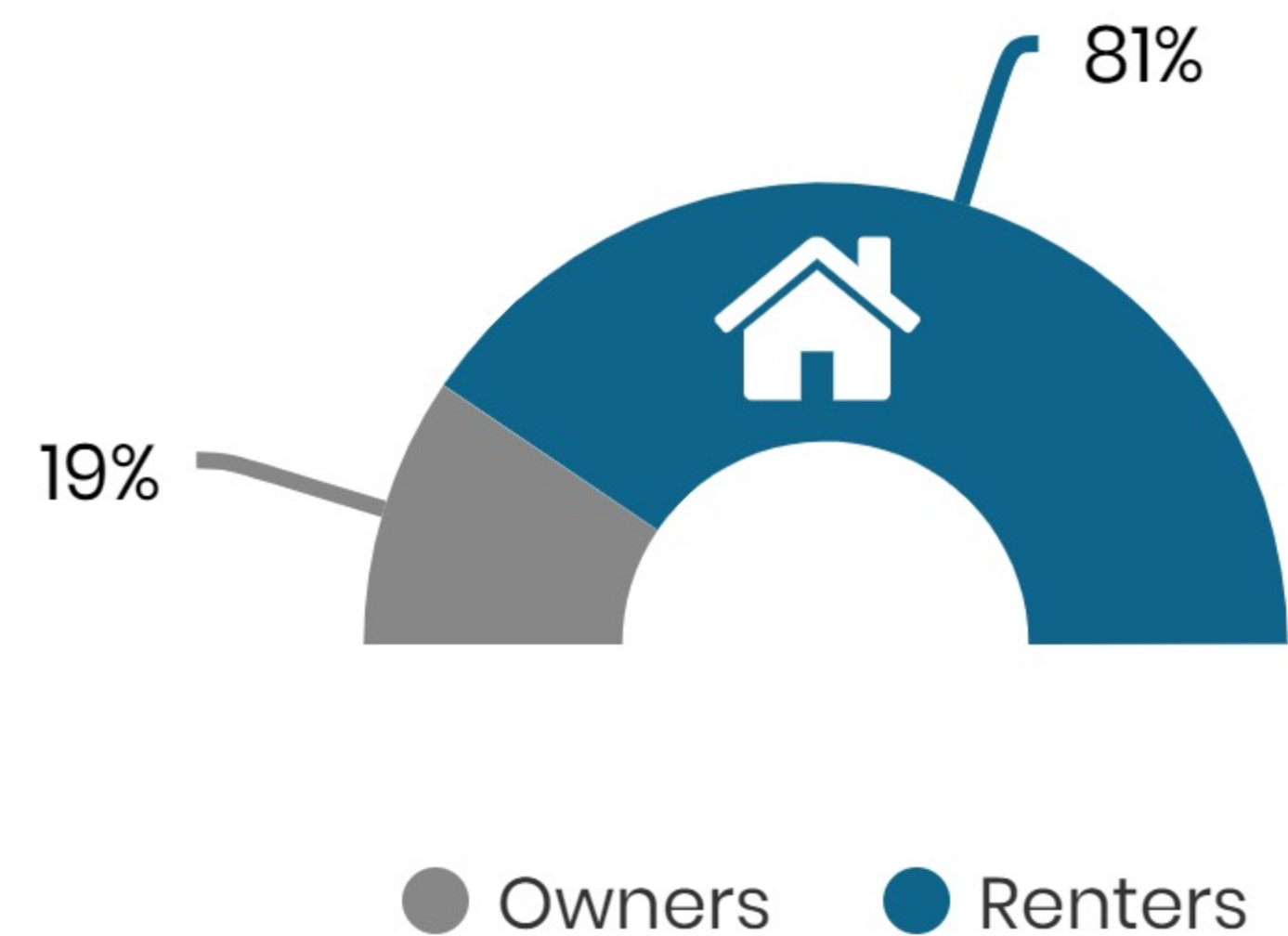
Urban Edge | G25

Lifestyles and Housing Preferences | Michigan Averages

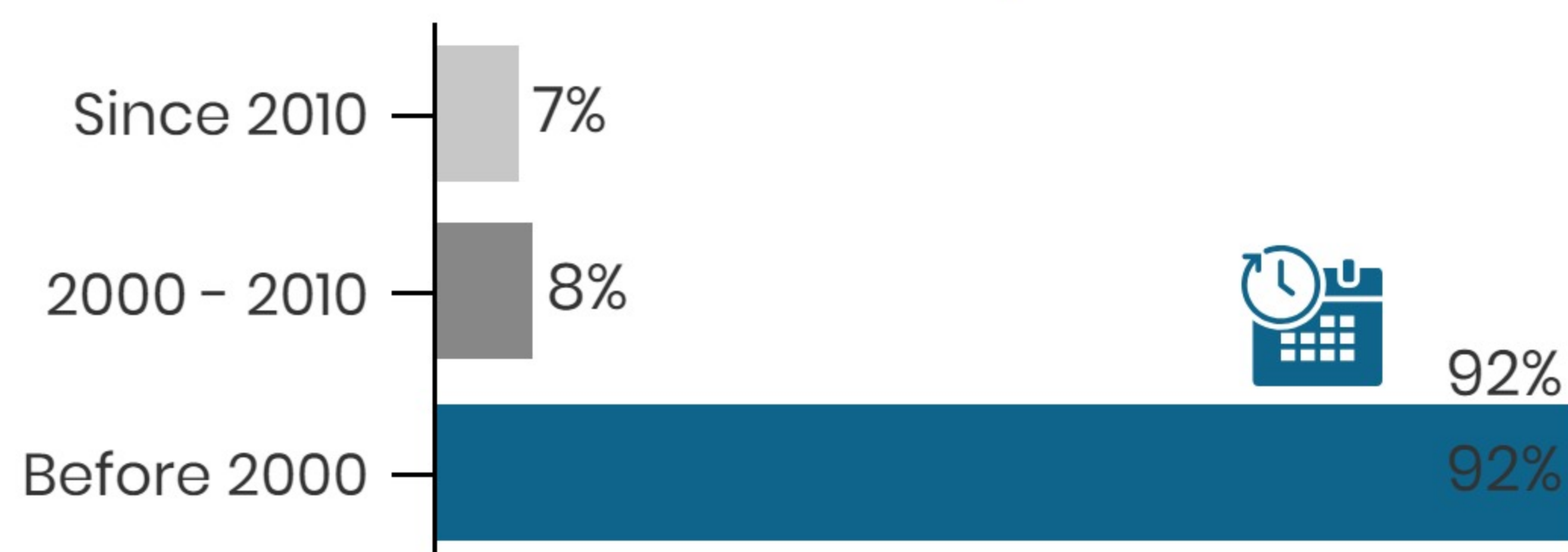
Average Annual Movership Rates



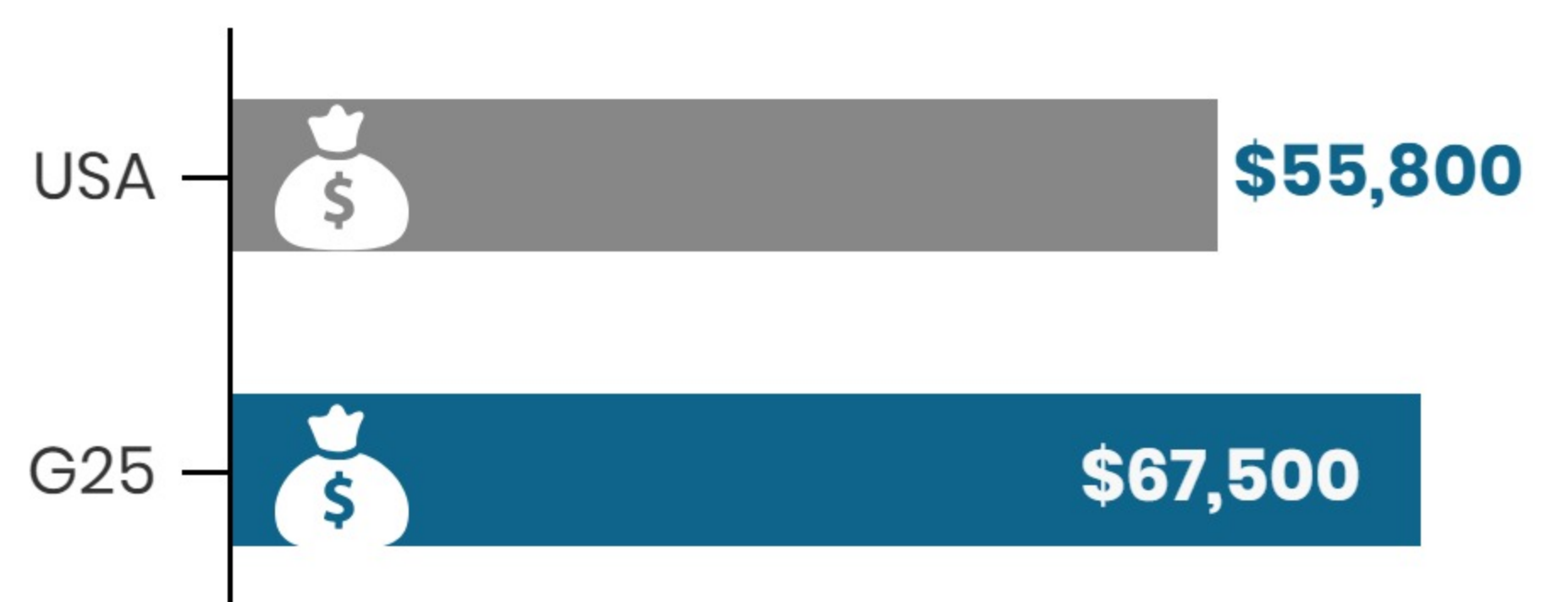
Average Tenure



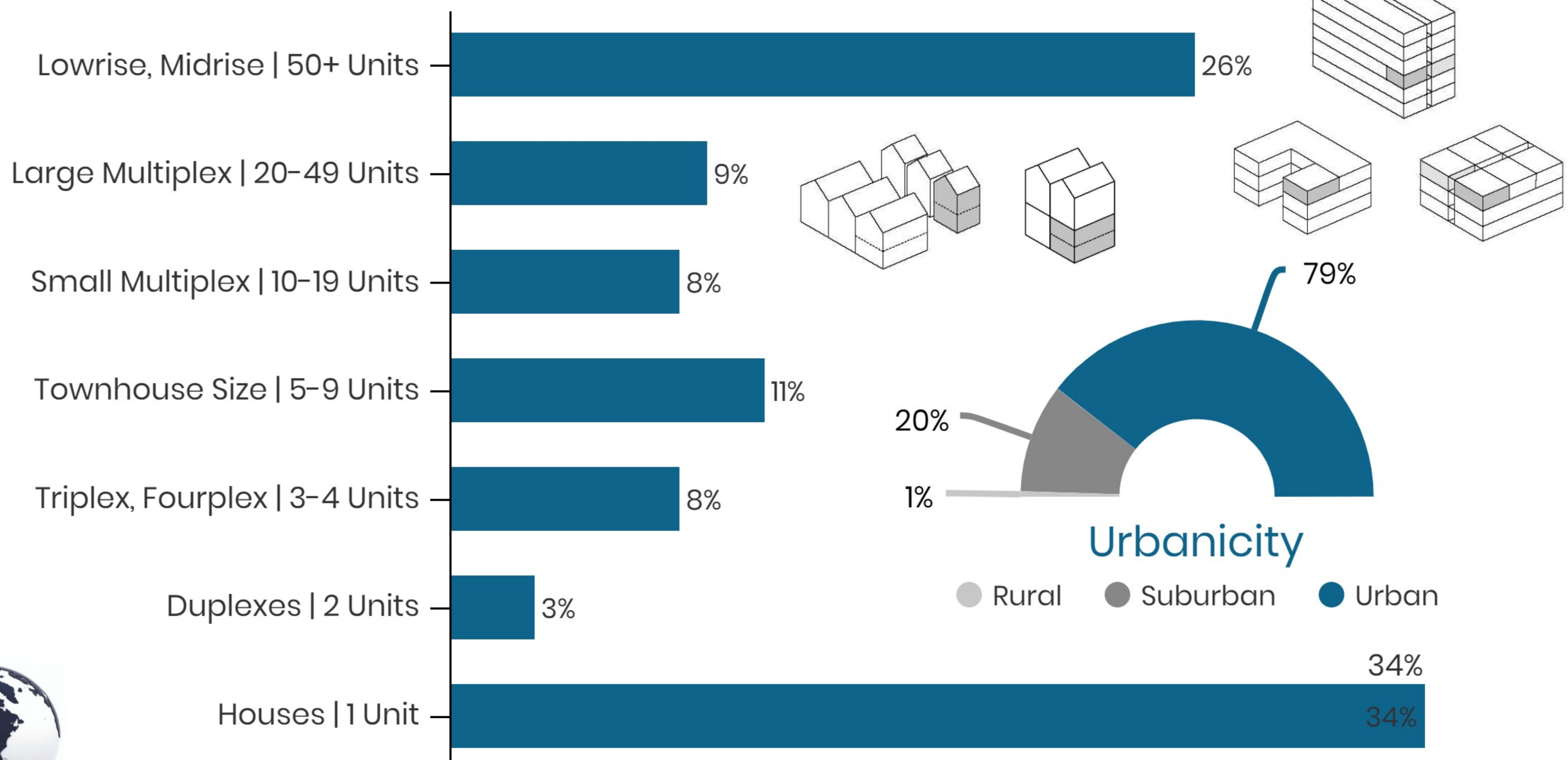
Inclination for Units by Decade Built



Median Household Income



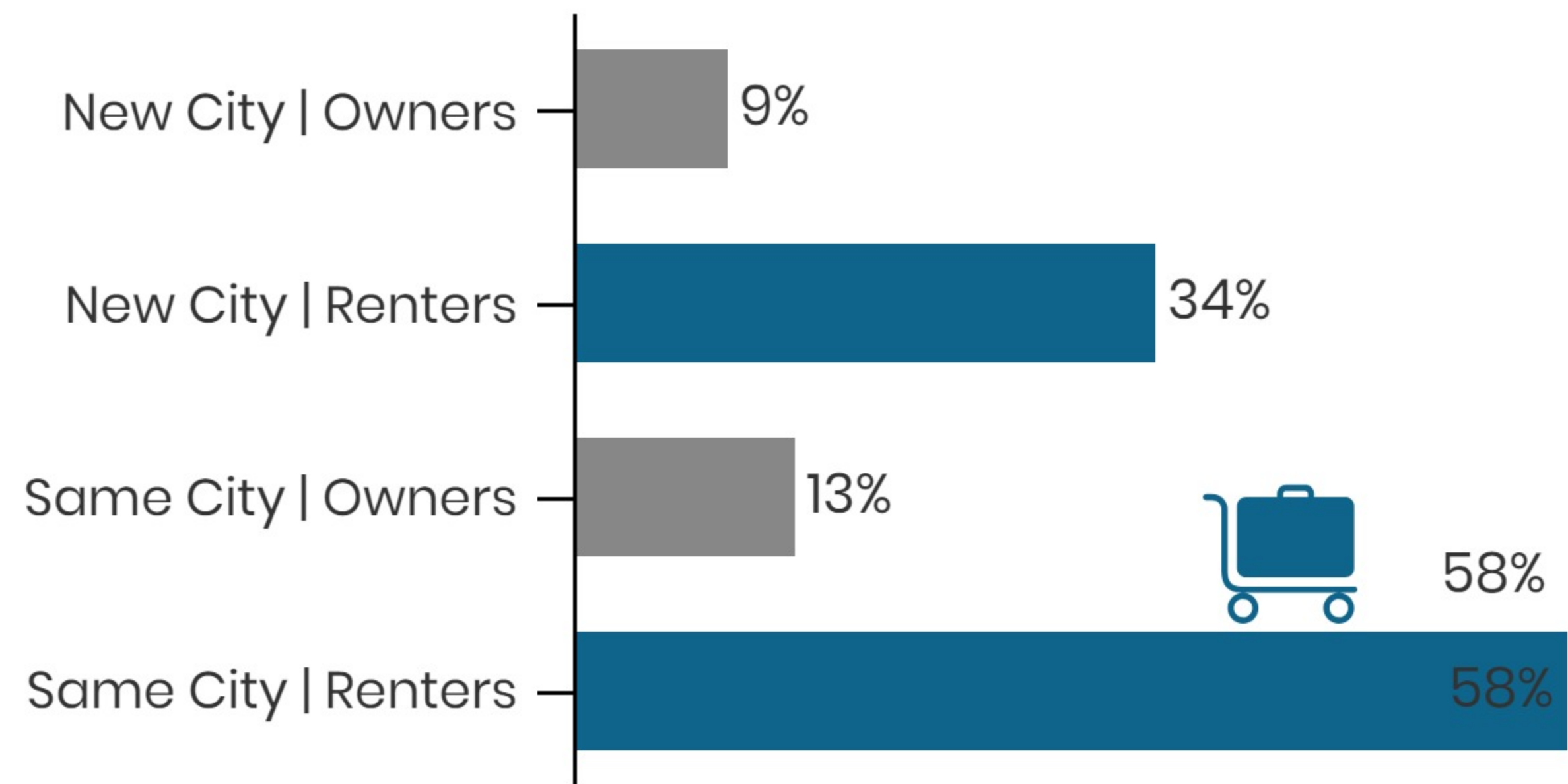
Inclination for Units by Building Size



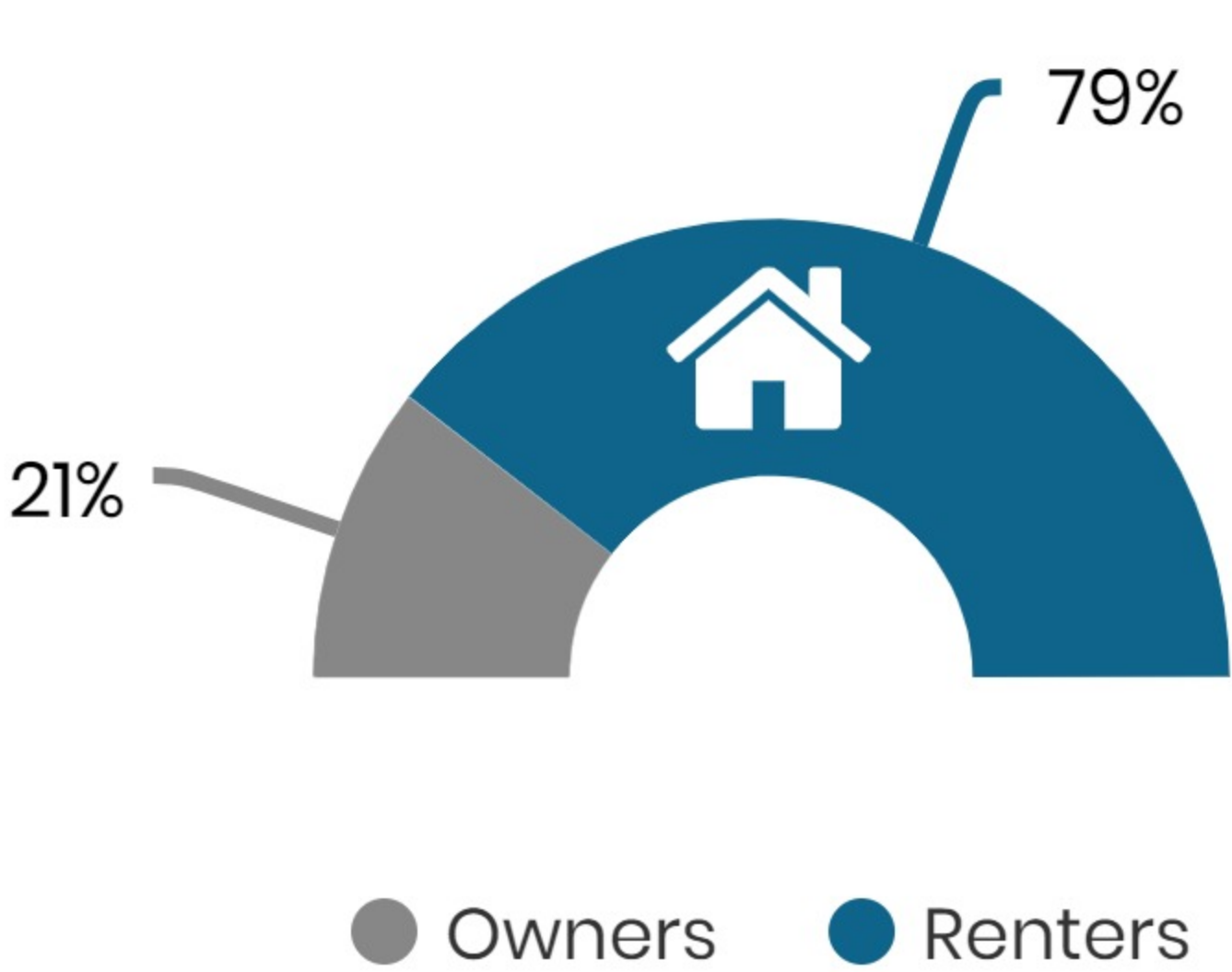
Wired for Success | K37

Lifestyles and Housing Preferences | Michigan Averages

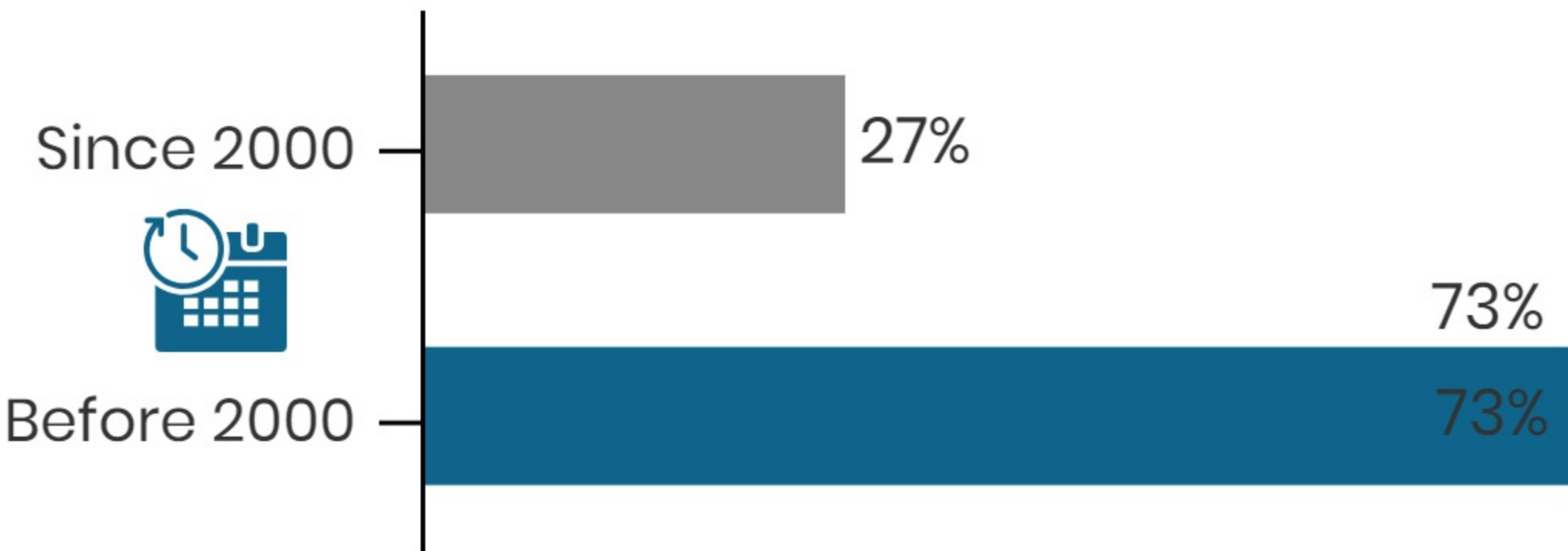
Average Annual Movership Rates



Average Tenure



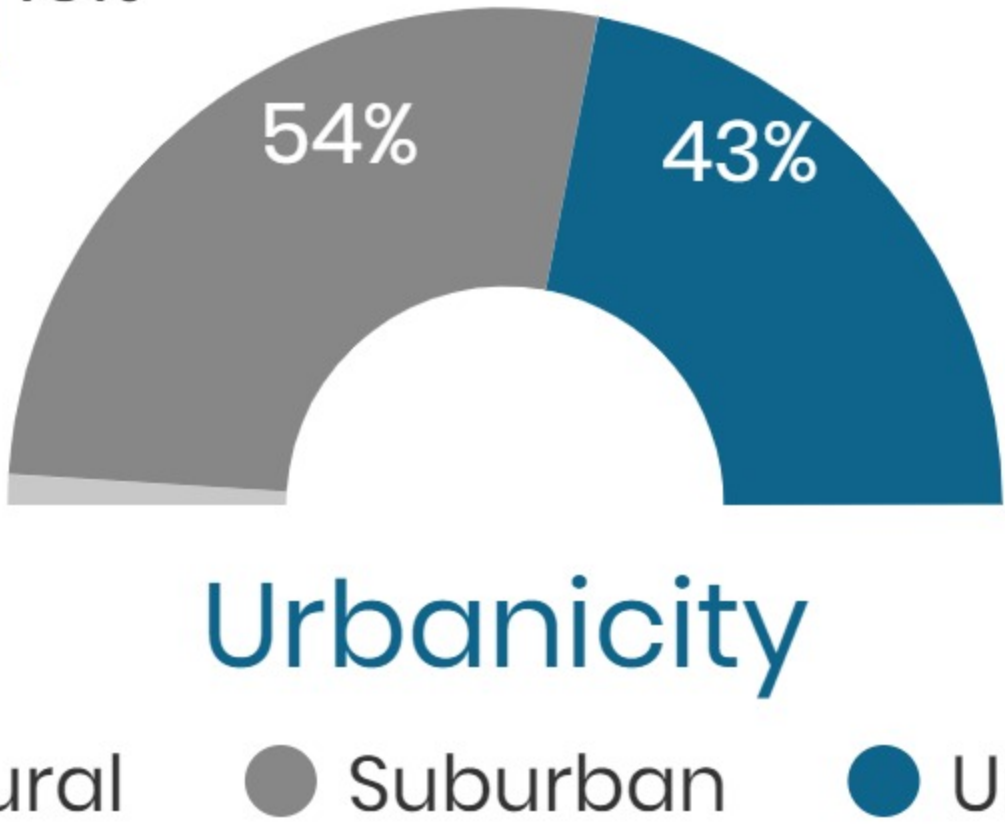
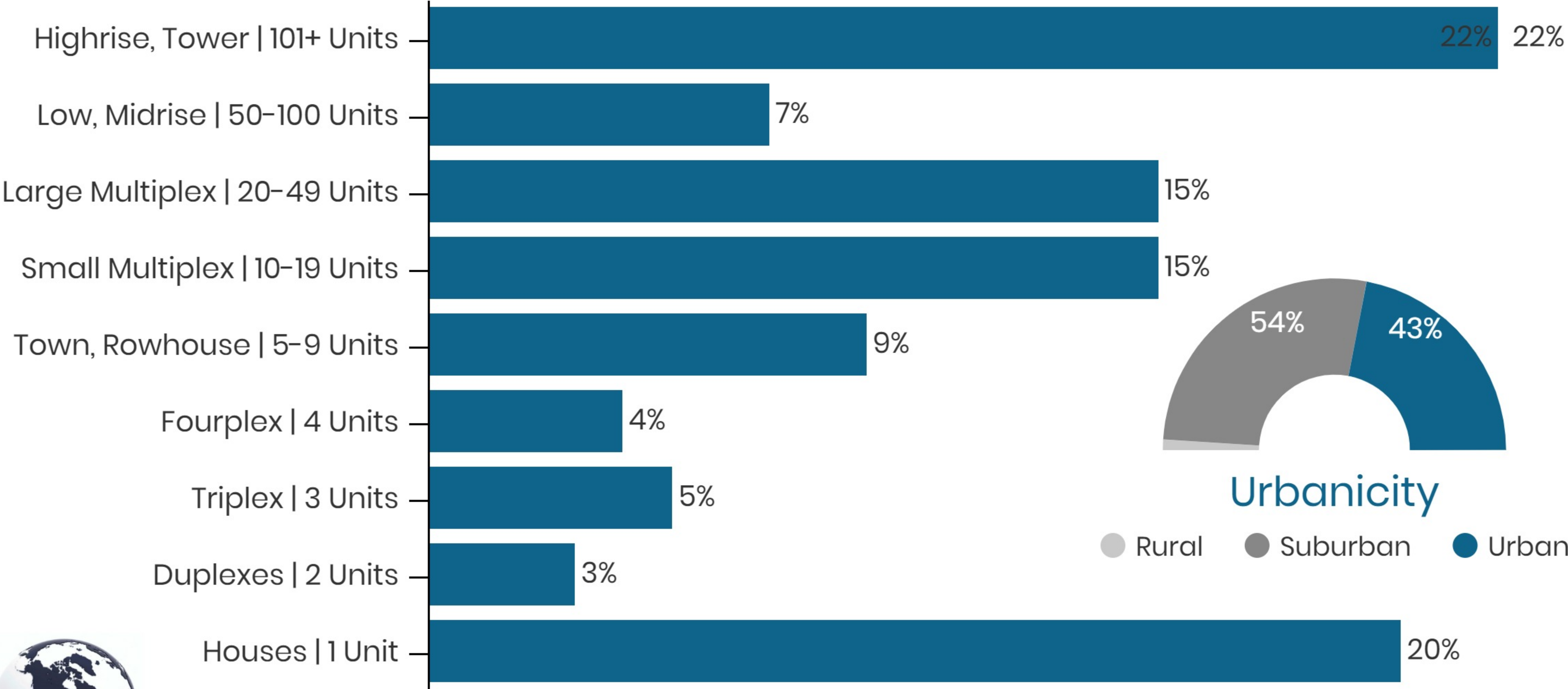
Inclination for Newer Units



Median Household Income



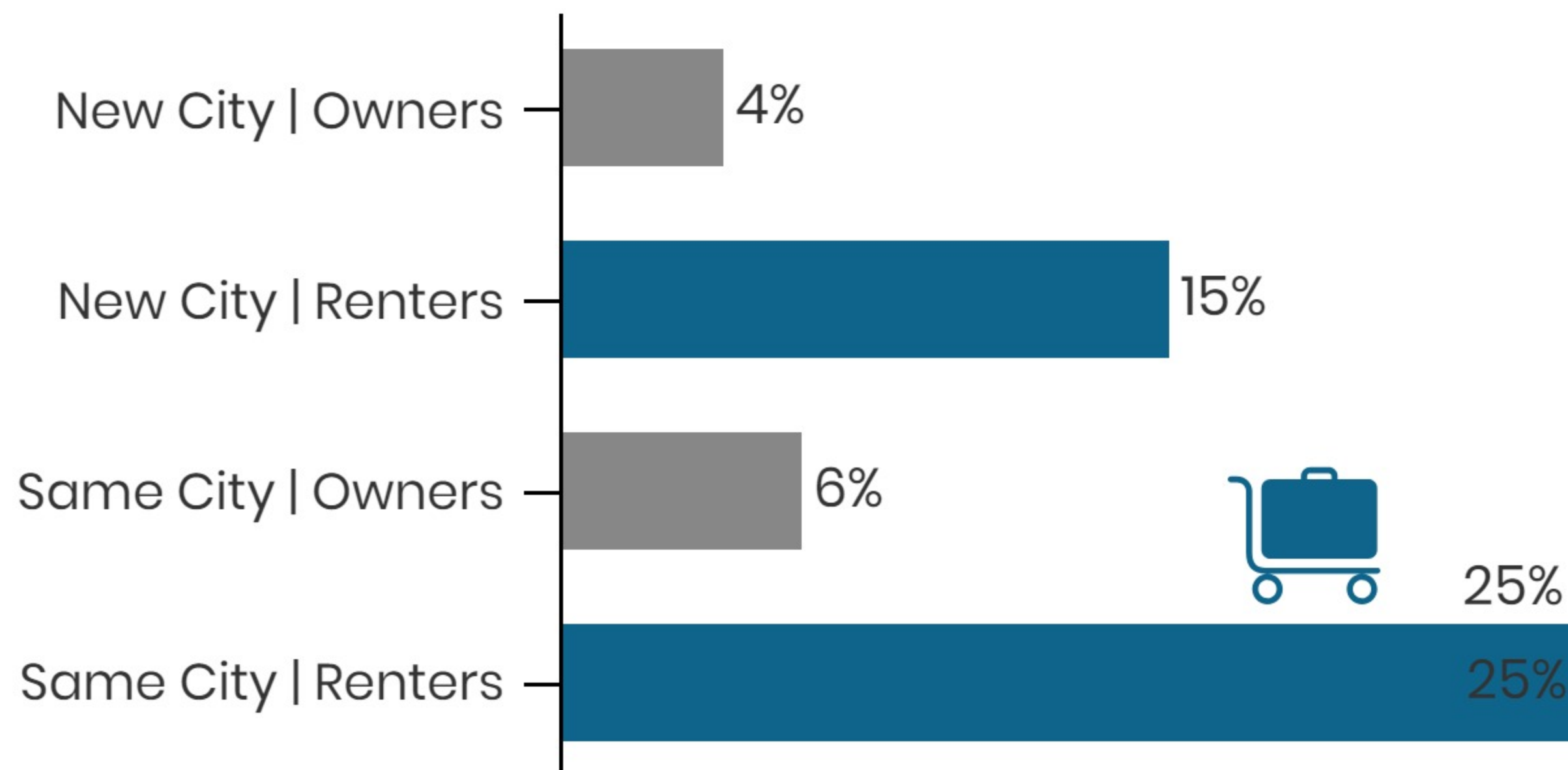
Inclination for Units by Building Size and Urbanicity



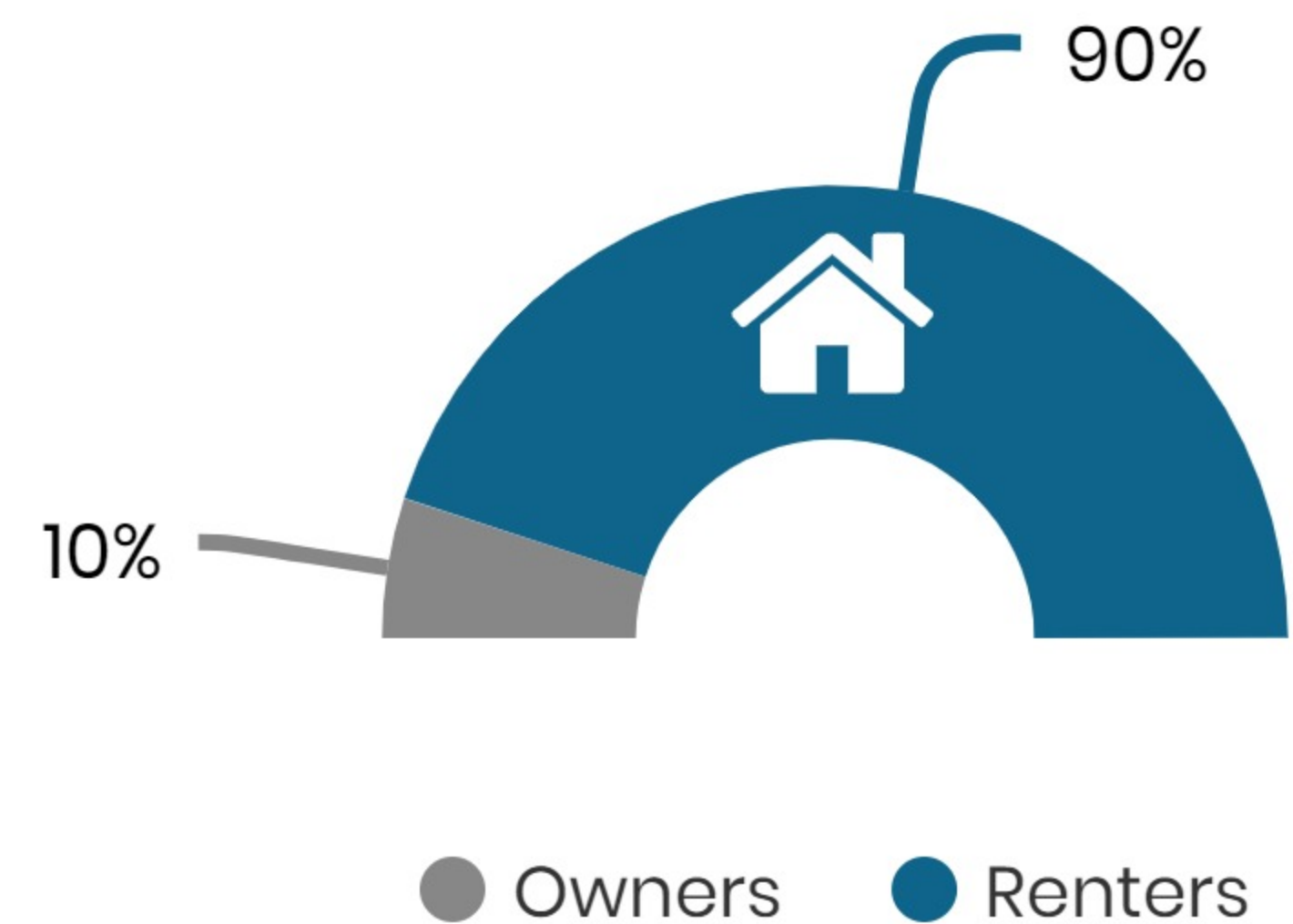
Bohemian Groove | K40

Lifestyles and Housing Preferences | Michigan Averages

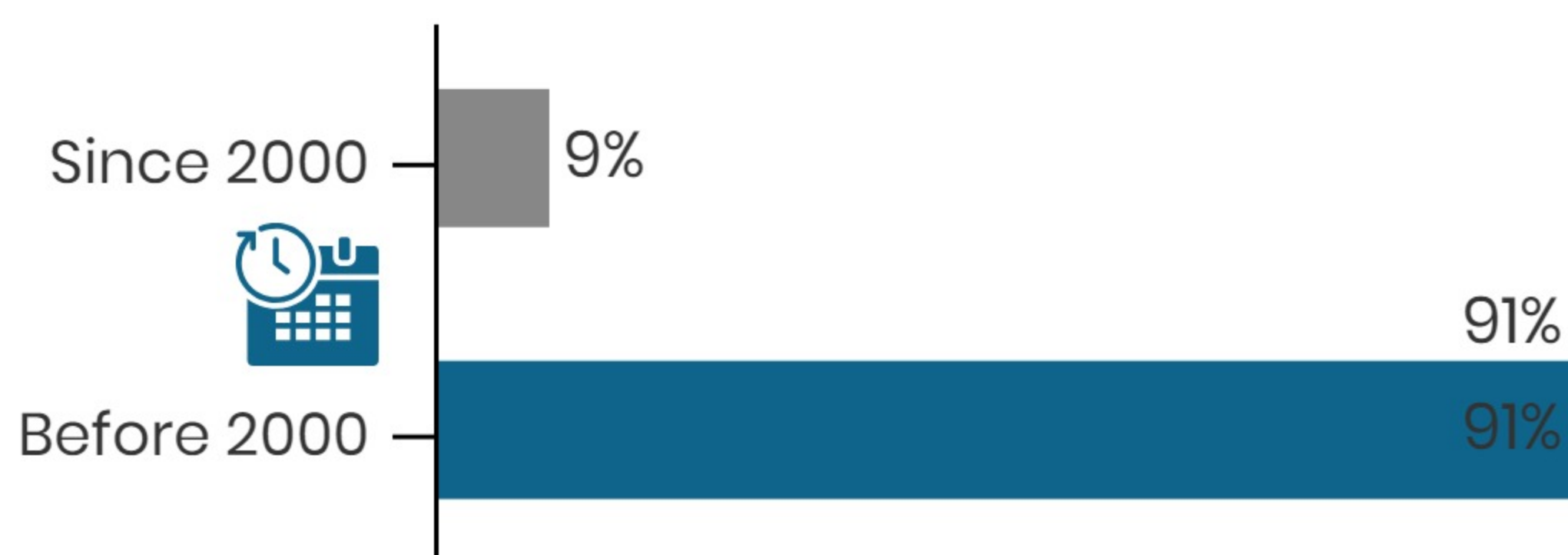
Average Annual Movership Rates



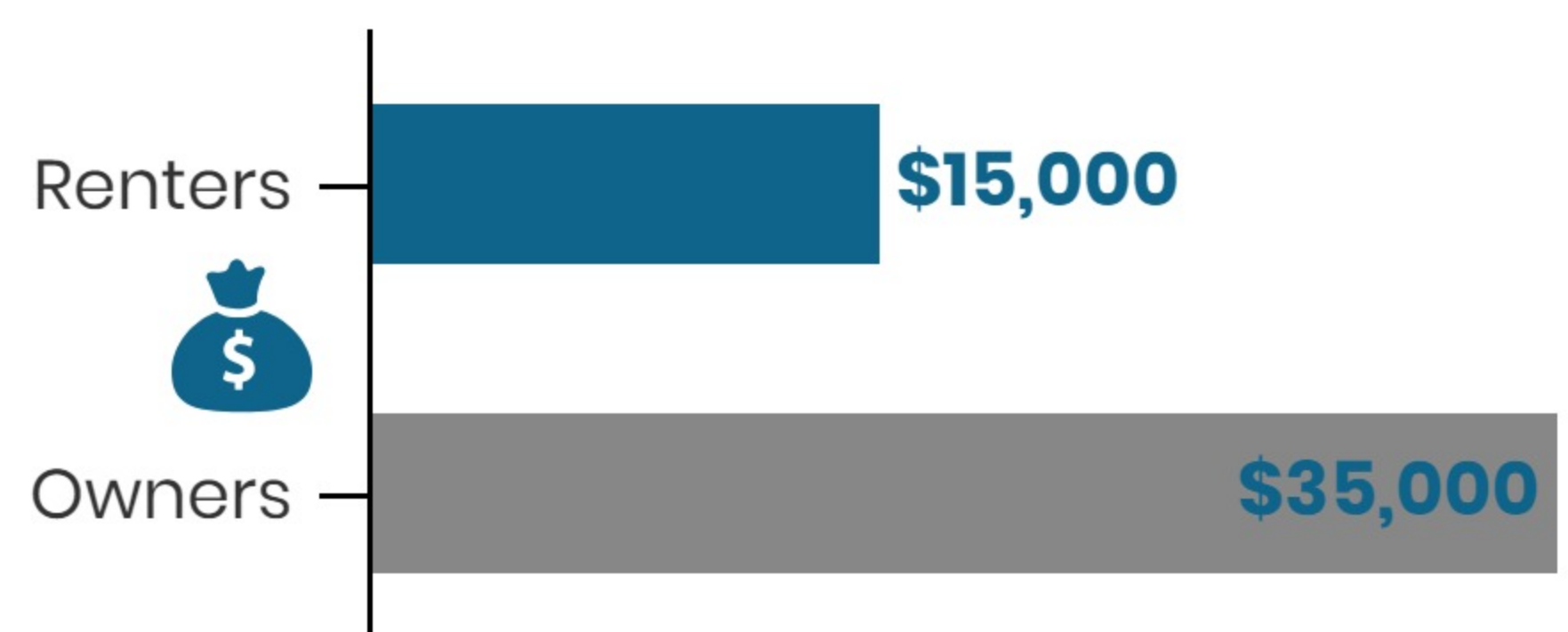
Average Tenure



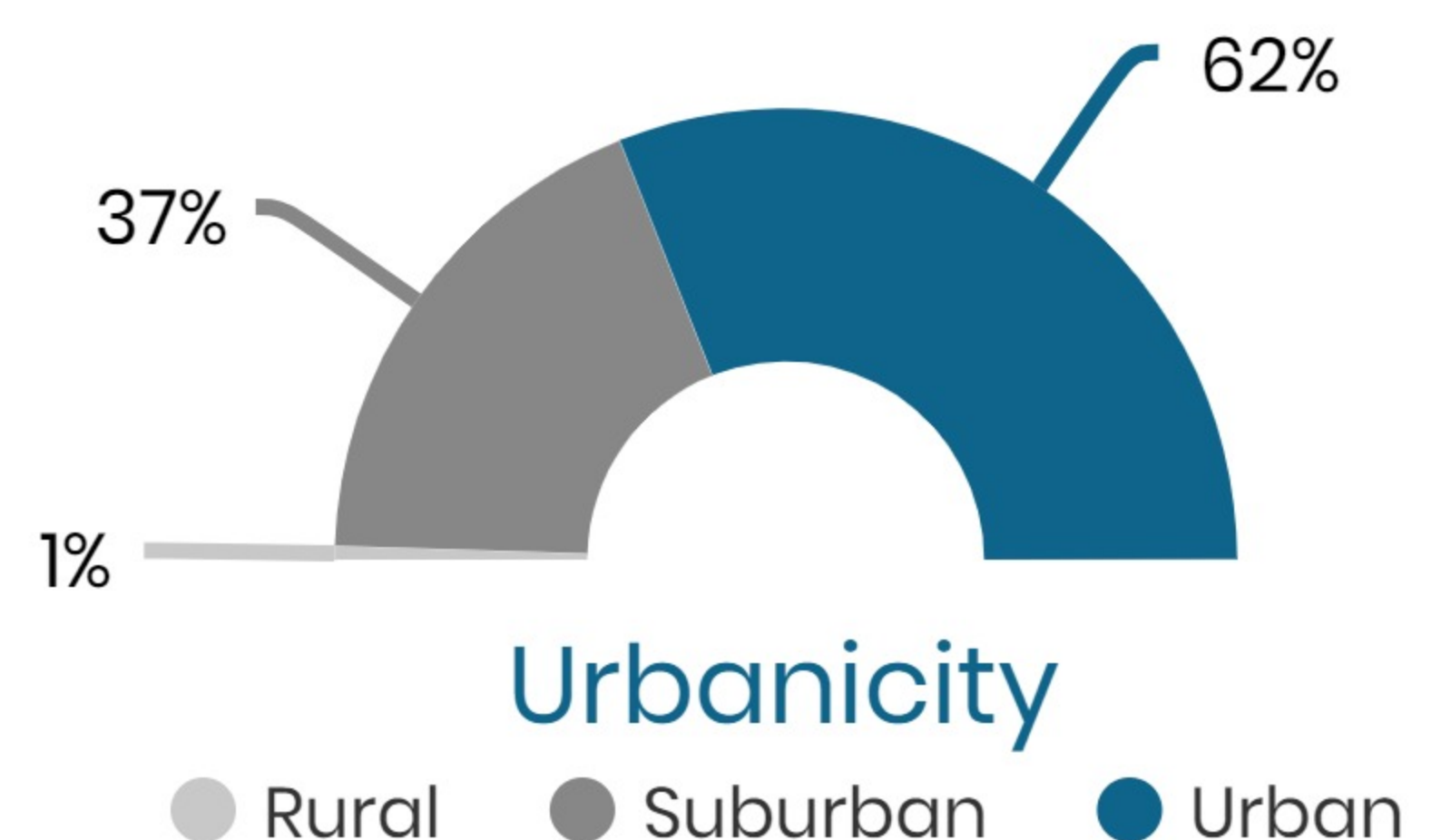
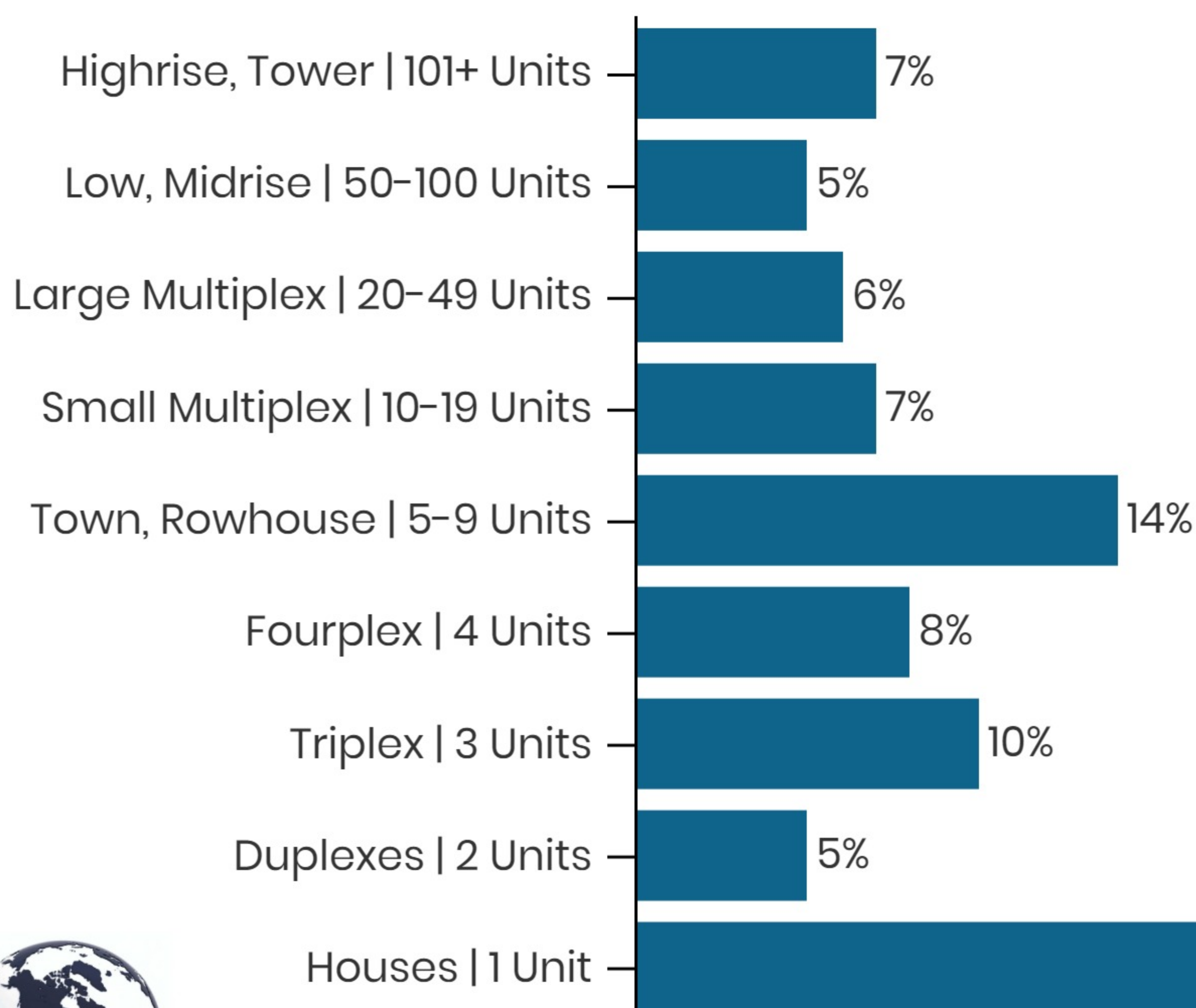
Inclination for Newer Units



Median Household Income



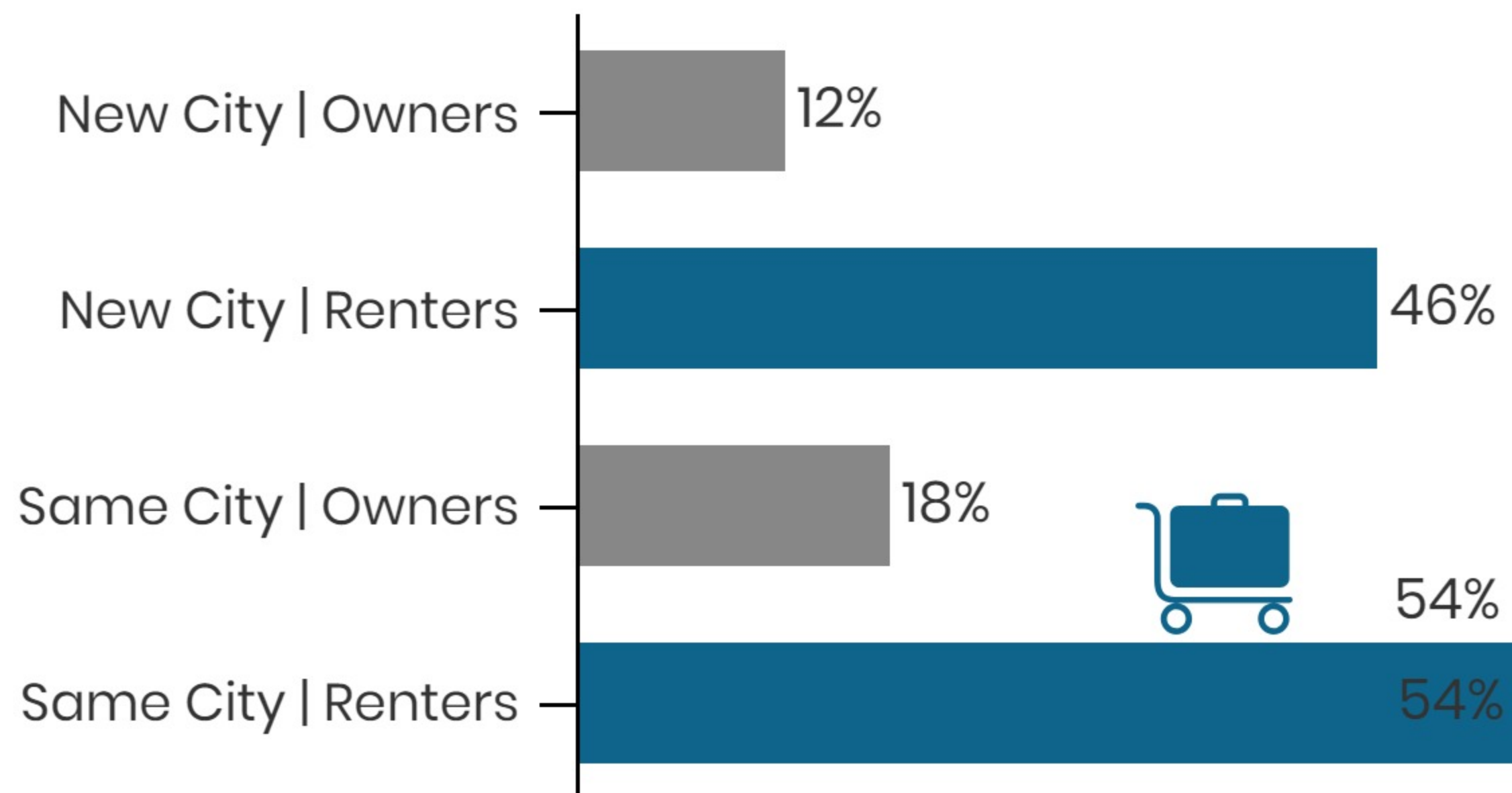
Inclination for Units by Building Size and Urbanicity



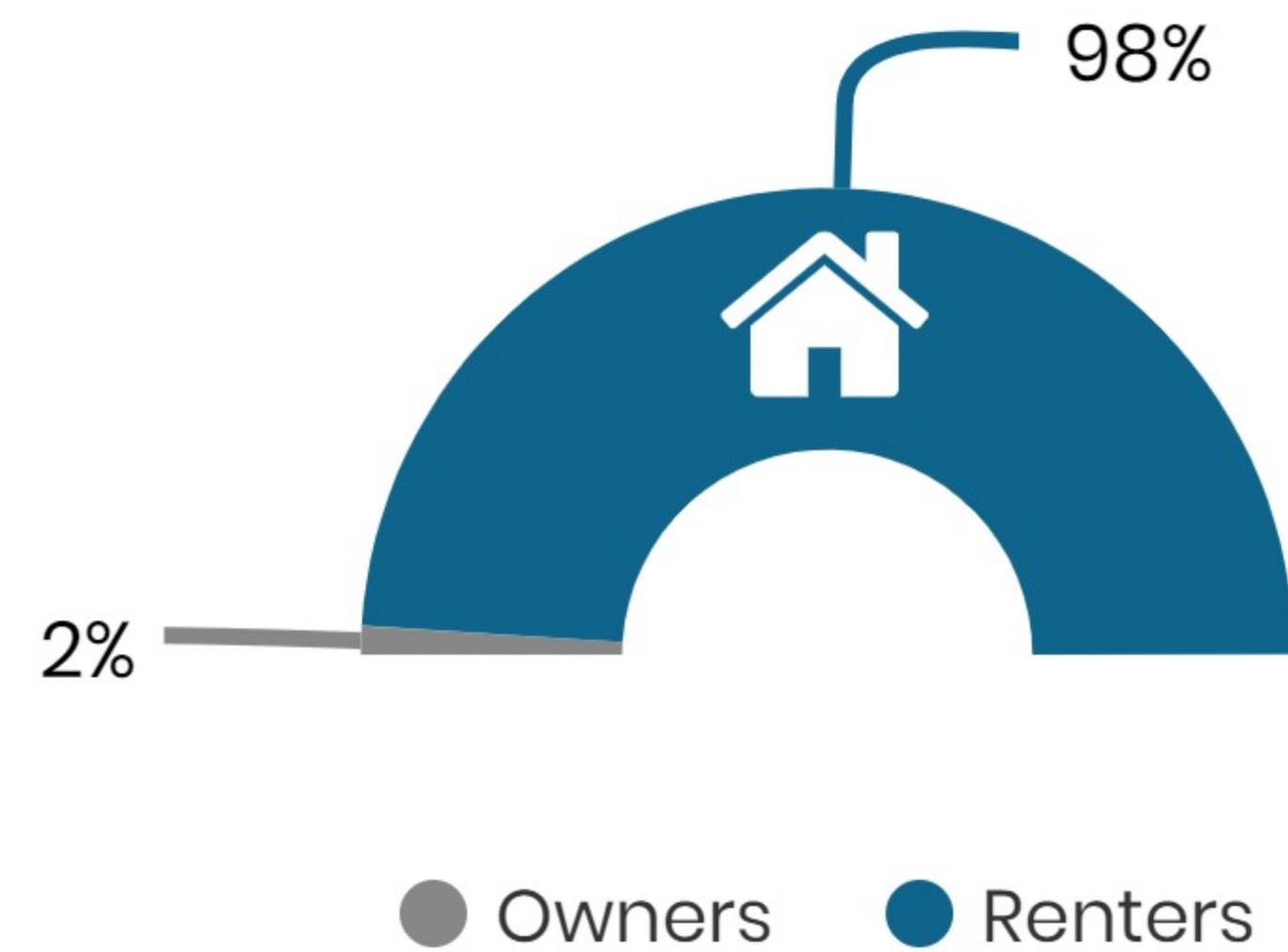
Full Steam Ahead | O50

Lifestyles and Housing Preferences | Michigan Averages

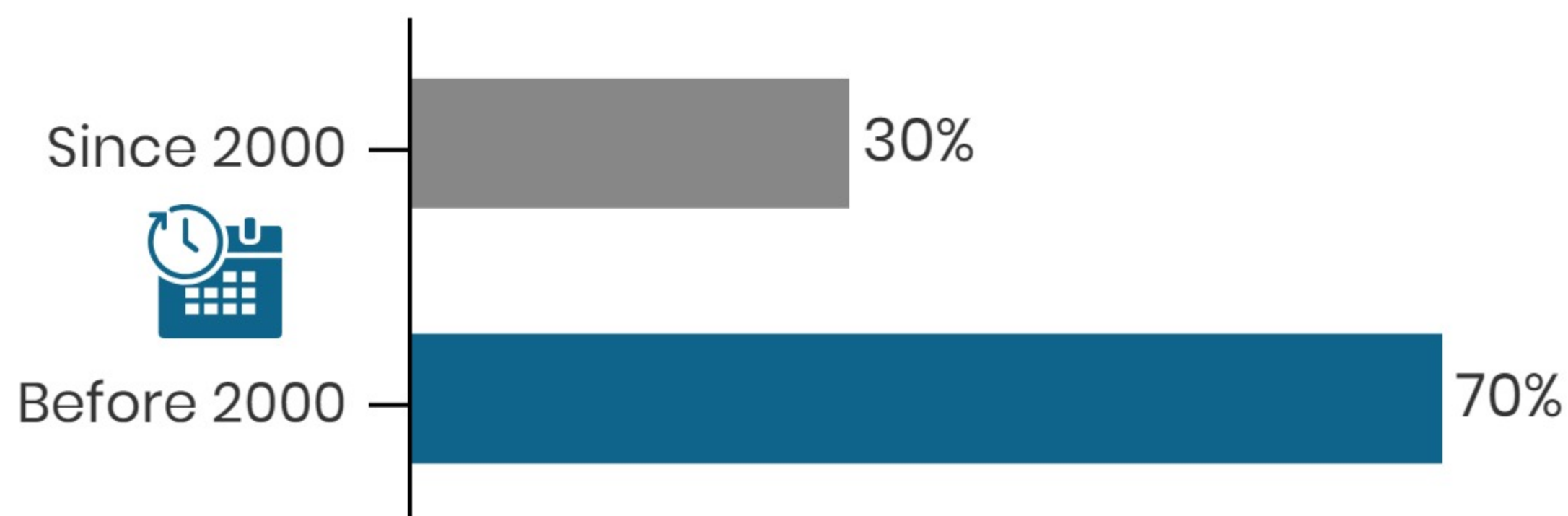
Average Annual Movership Rates



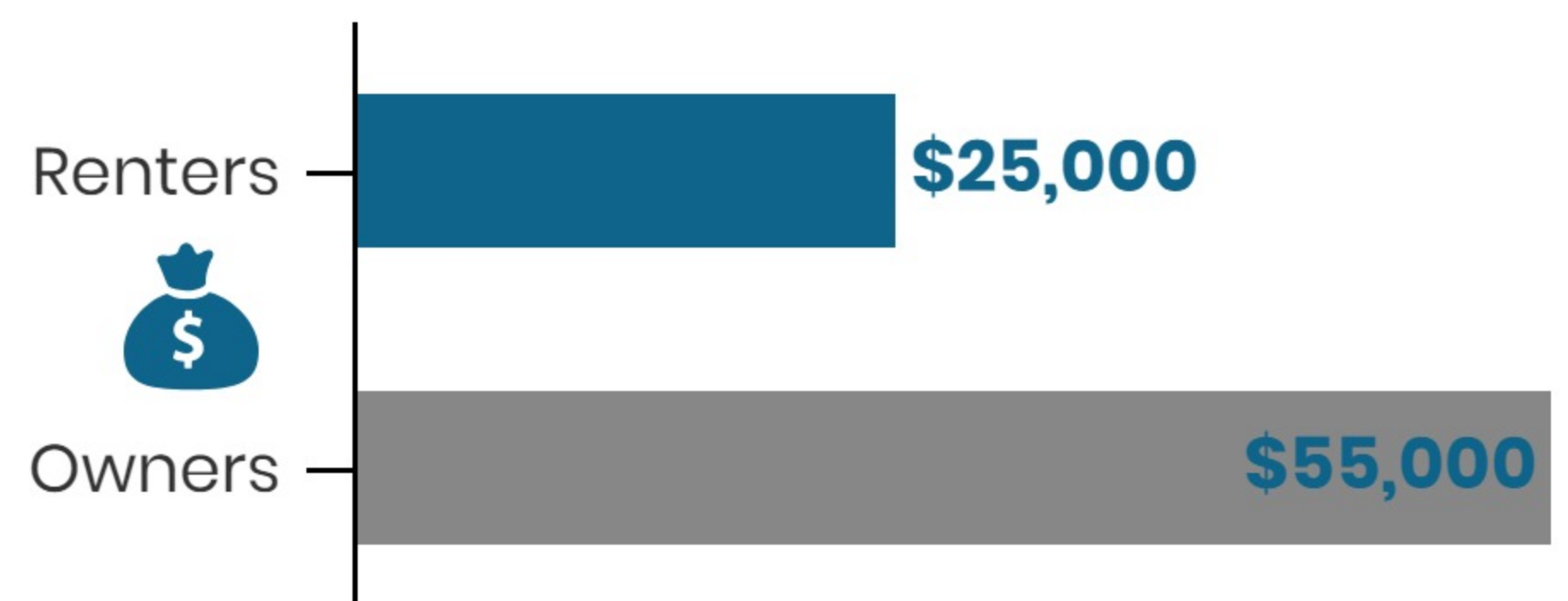
Average Tenure



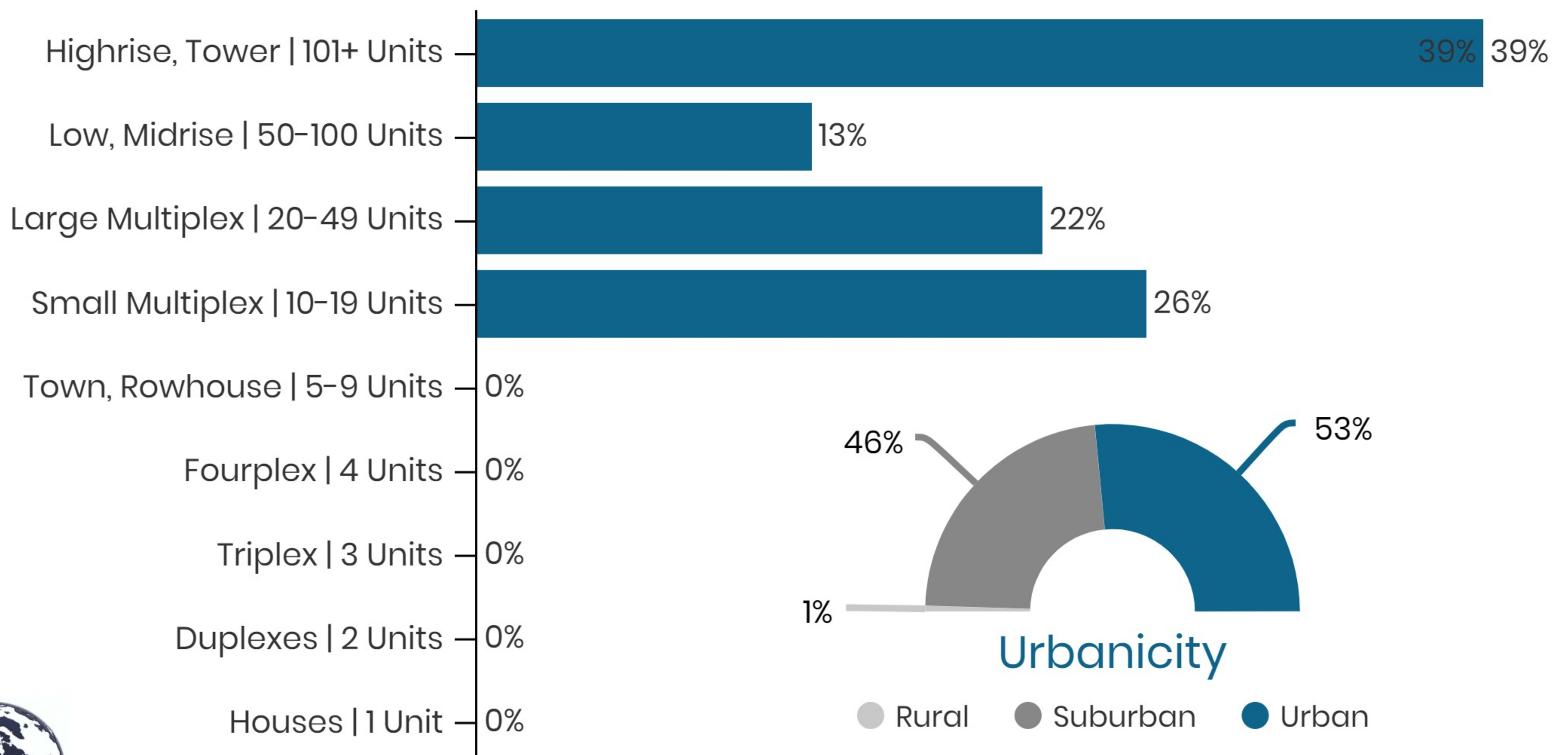
Inclination for Newer Units



Median Household Income



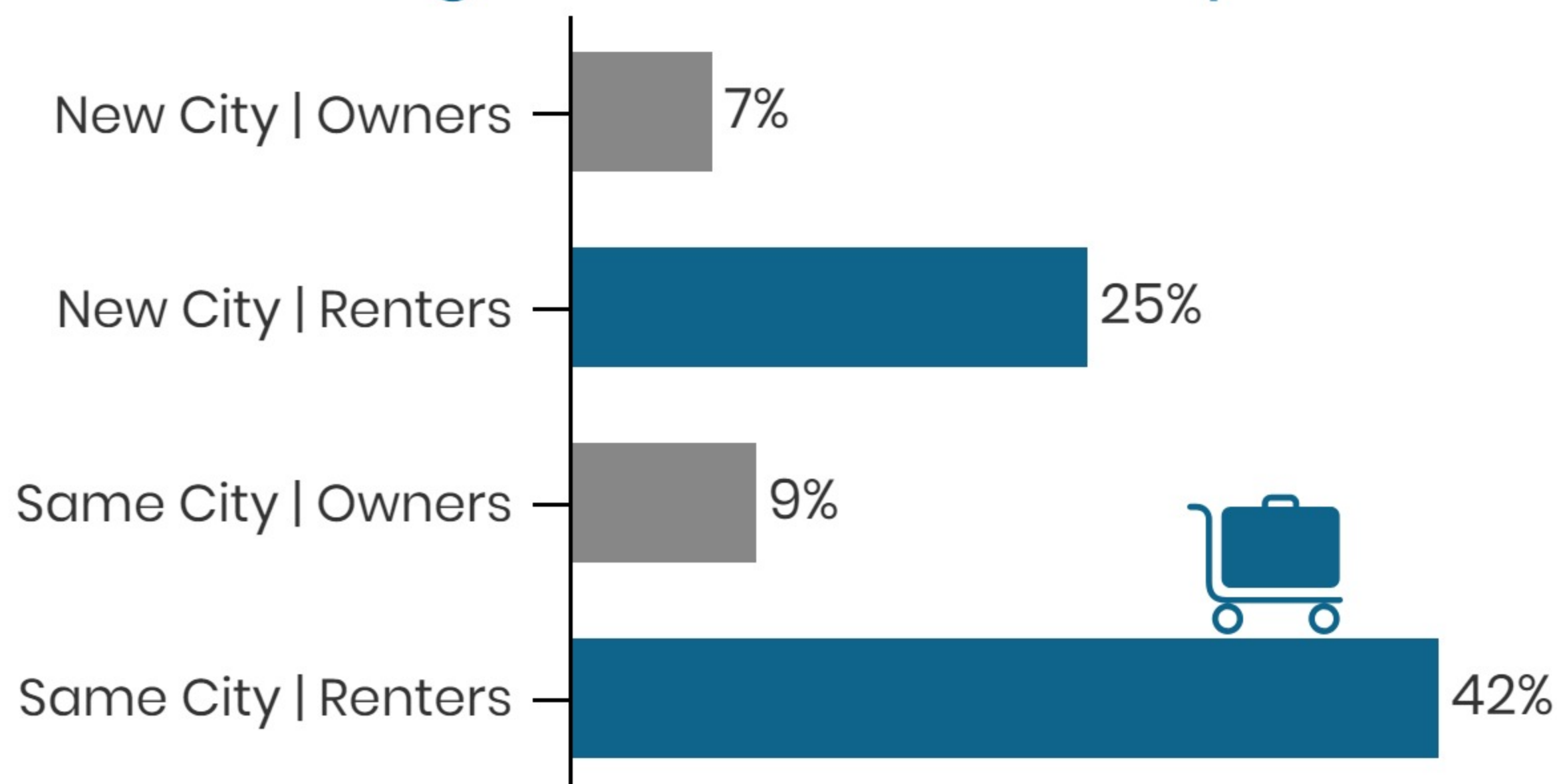
Inclination for Units by Building Size and Urbanicity



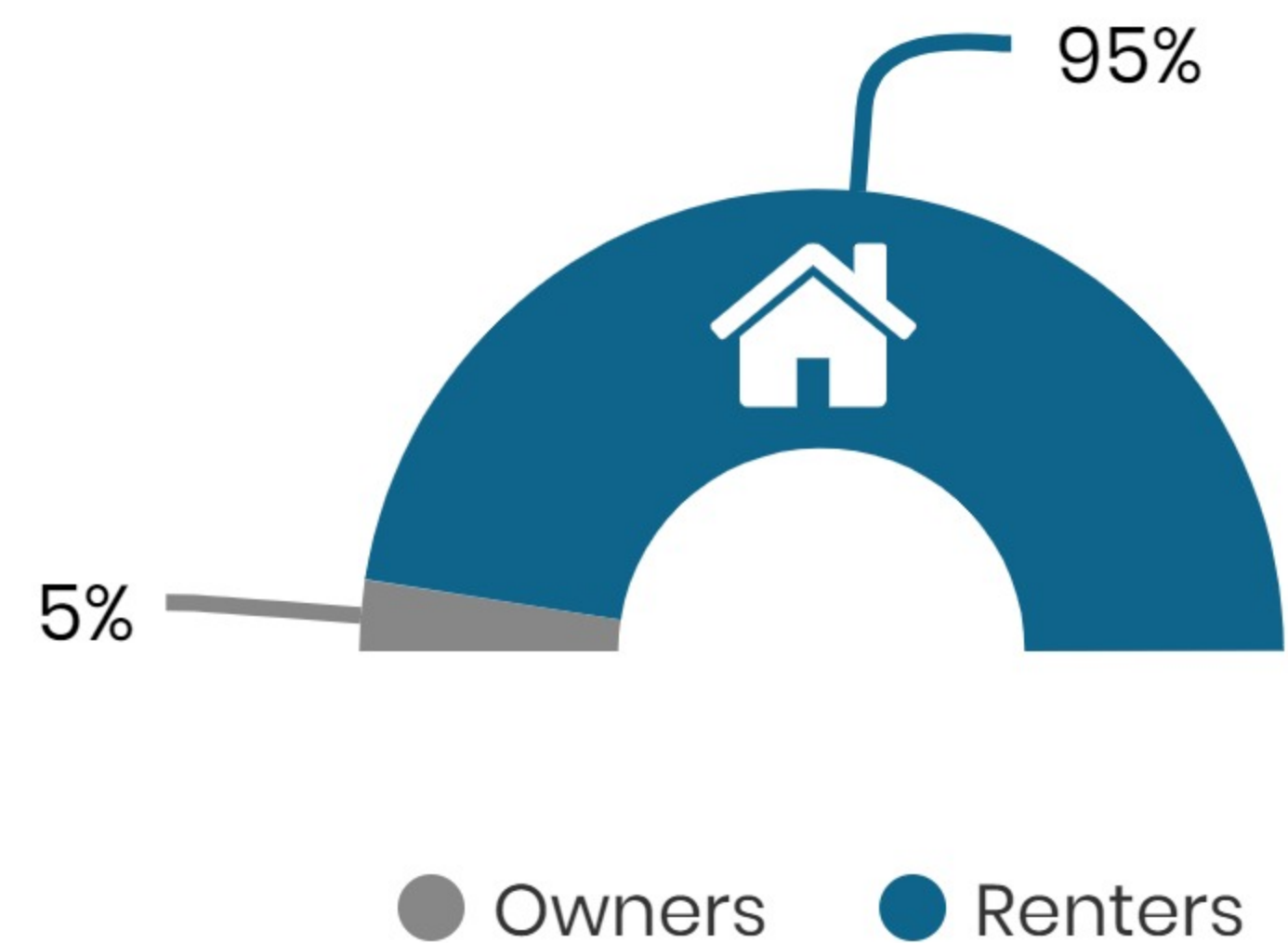
Urban Ambition | O52

Lifestyles and Housing Preferences | Michigan Averages

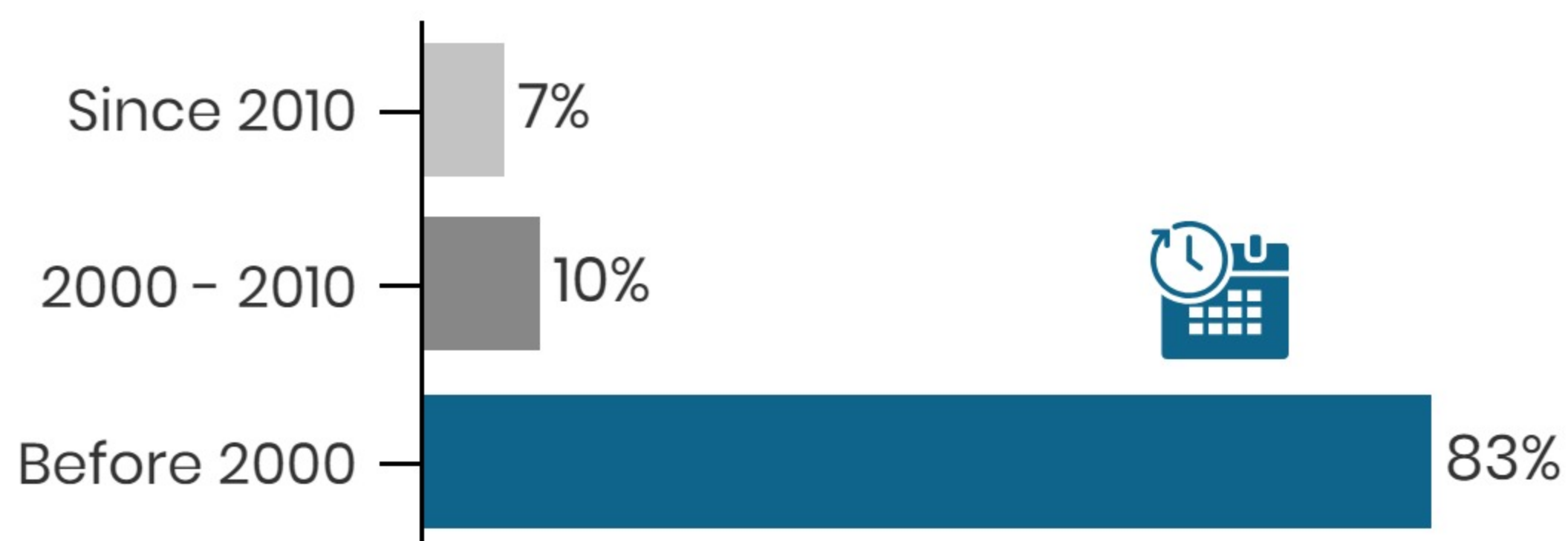
Average Annual Movership Rates



Average Tenure



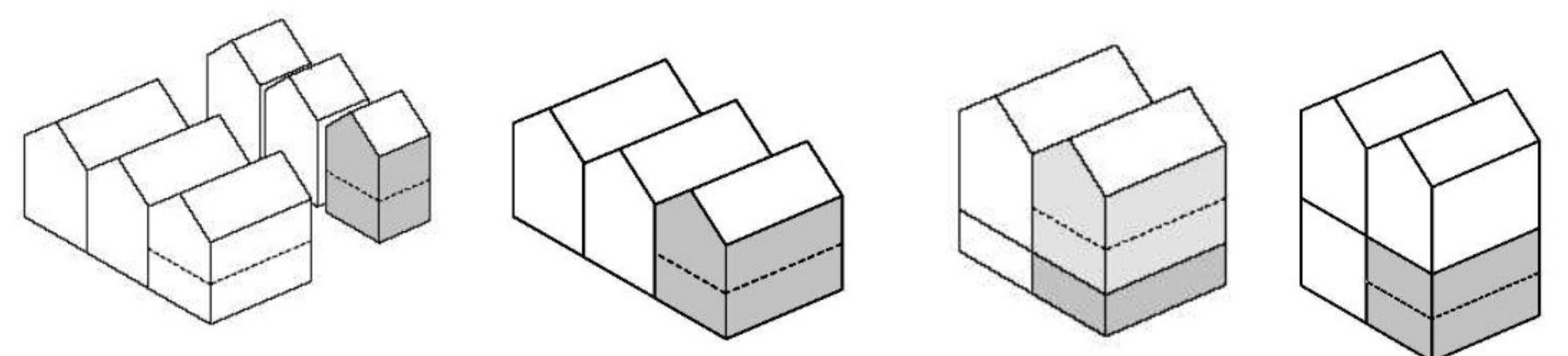
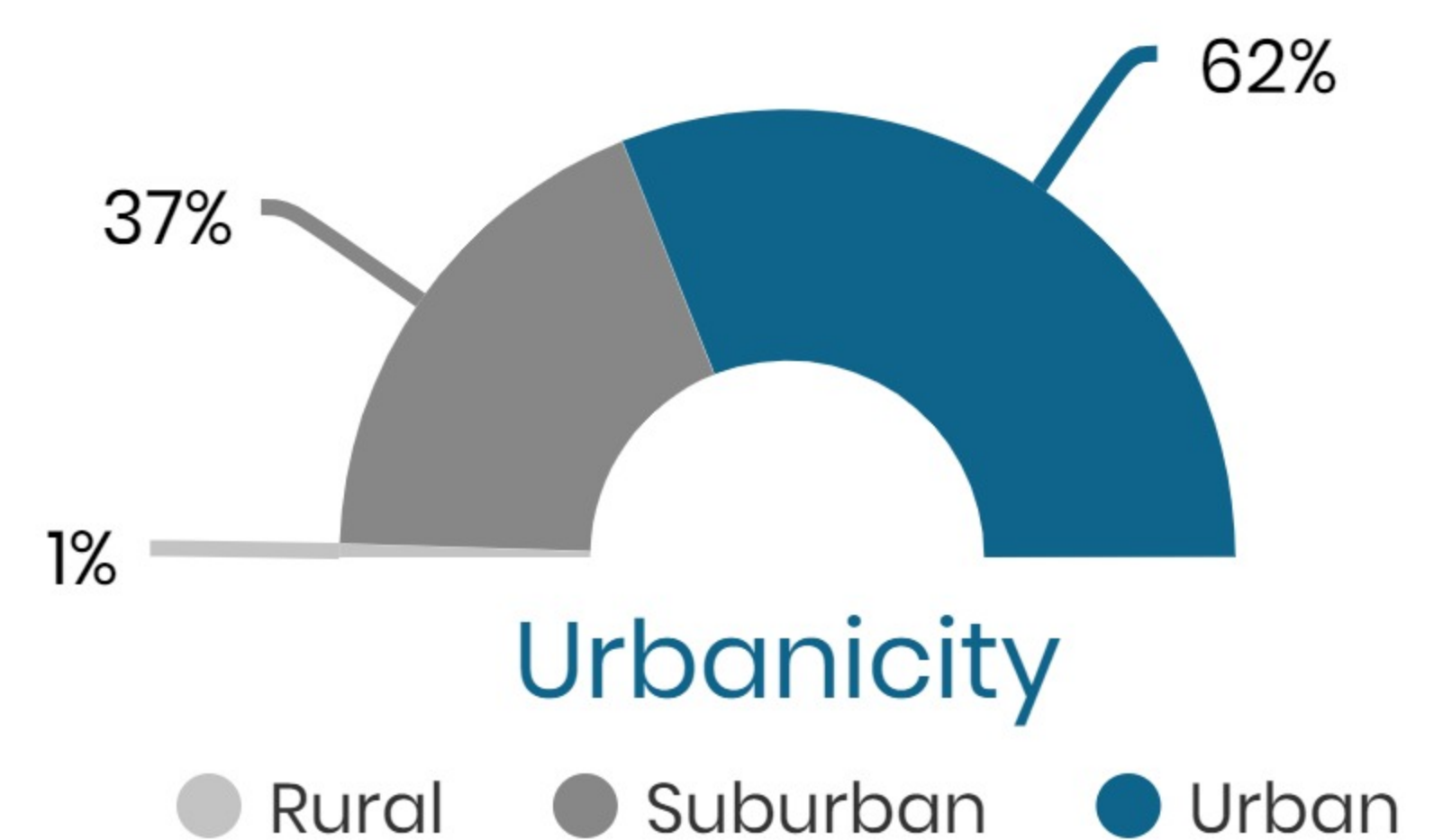
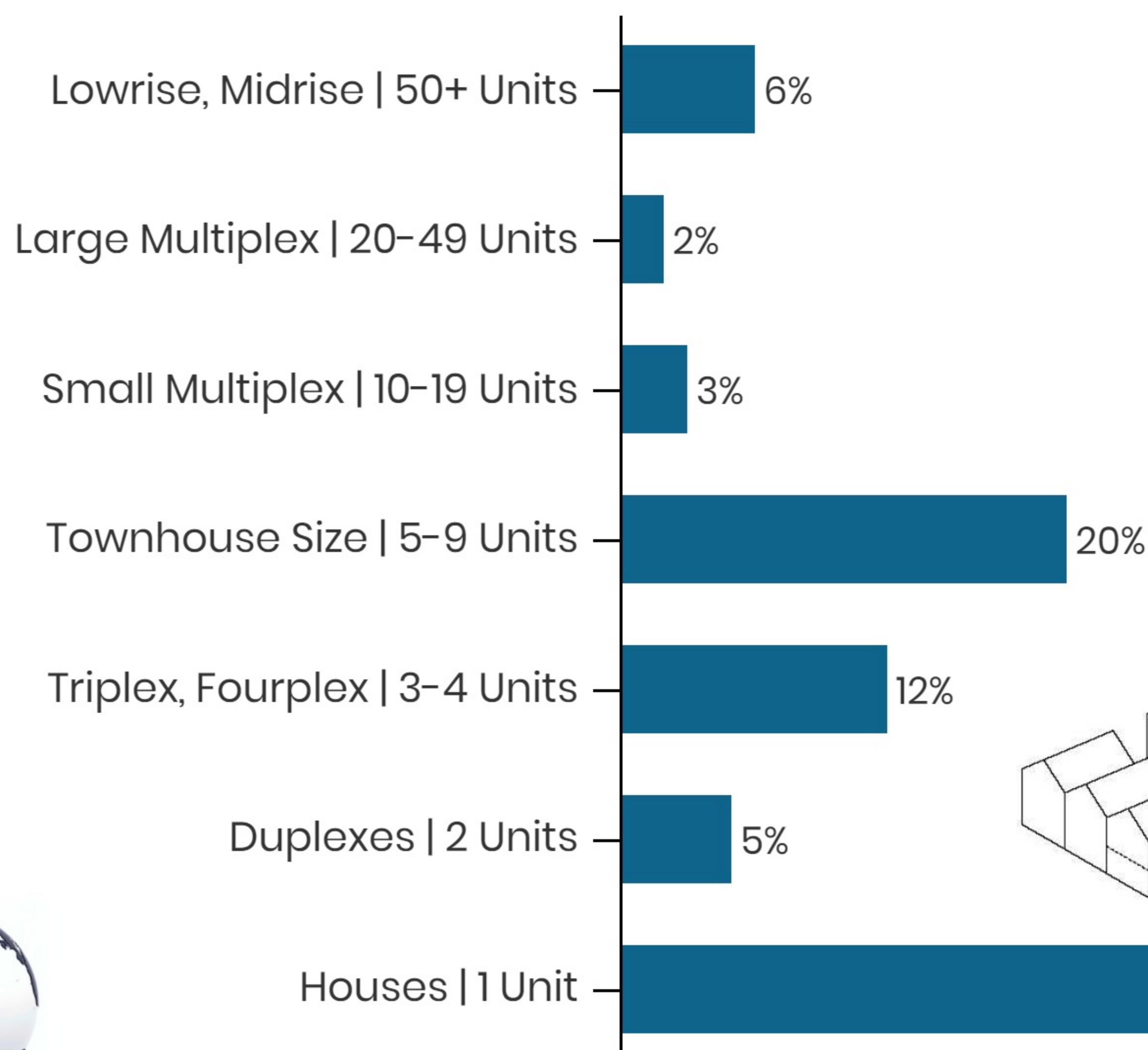
Inclination for Units by Decade Built



Median Household Income



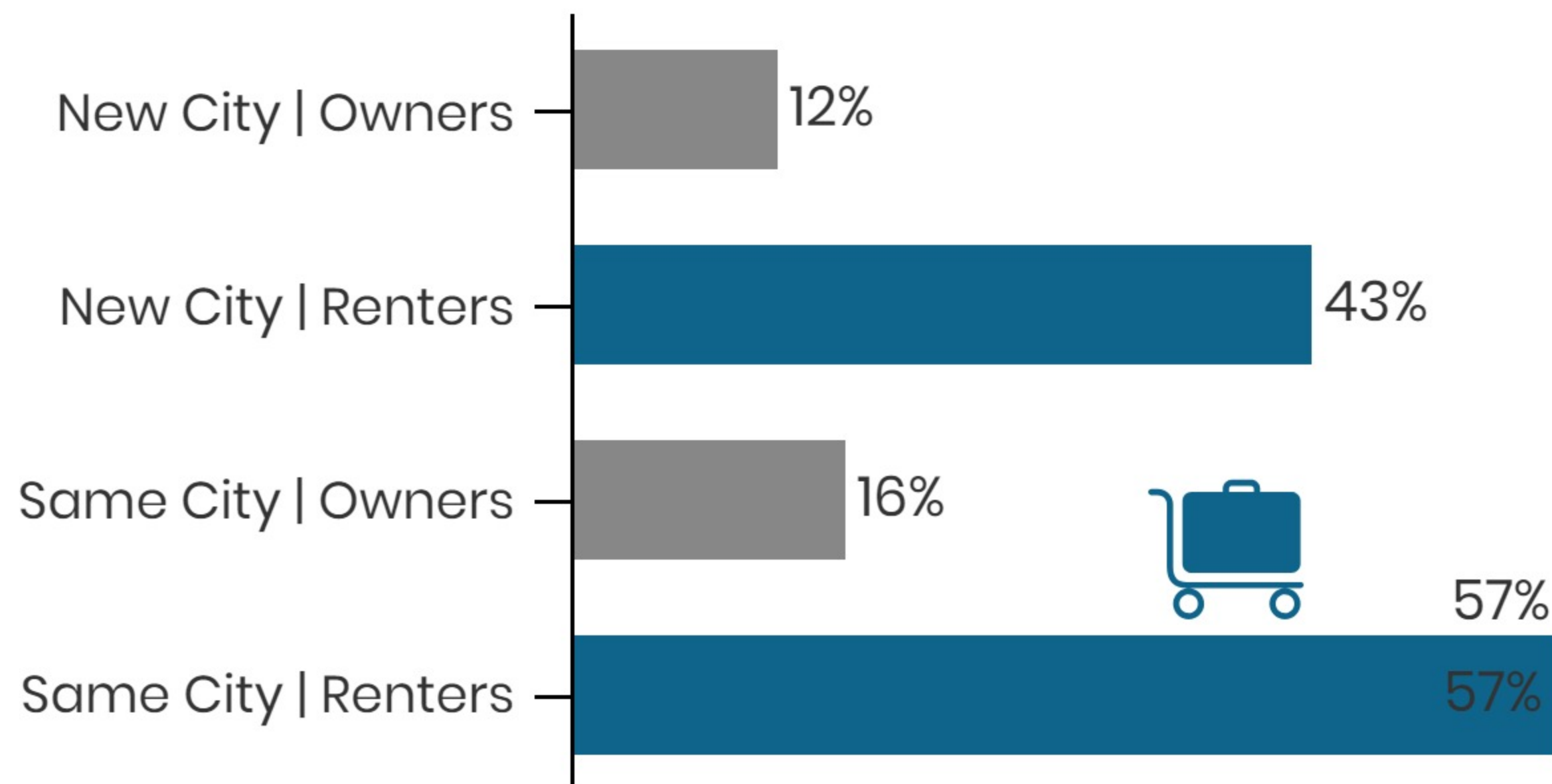
Inclination for Units by Building Size



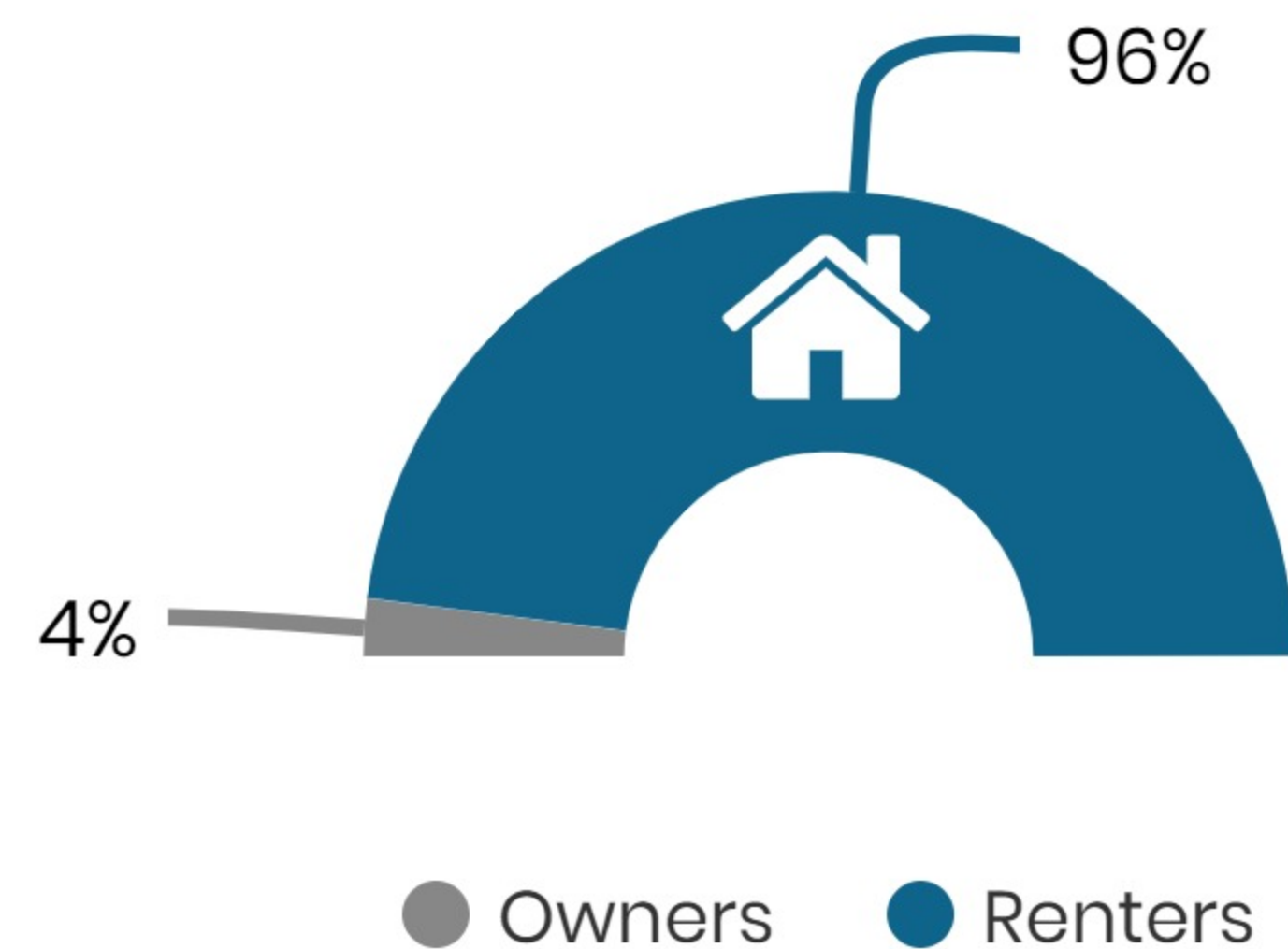
Striving Singles | O54

Lifestyles and Housing Preferences | Michigan Averages

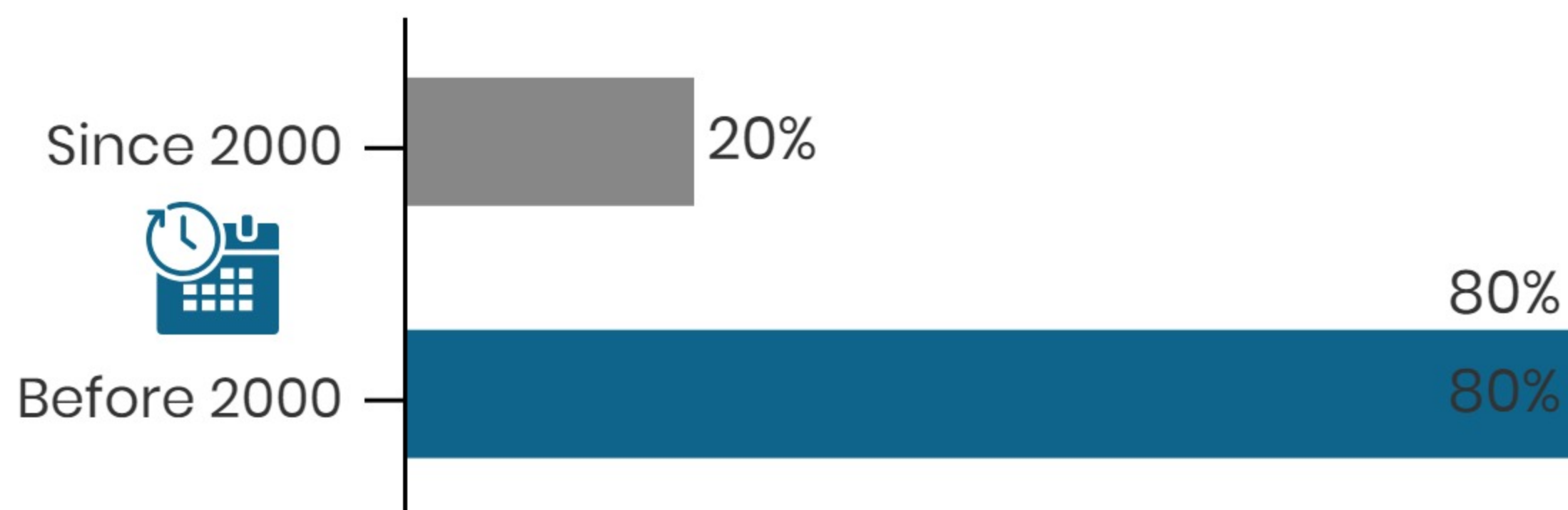
Average Annual Movership Rates



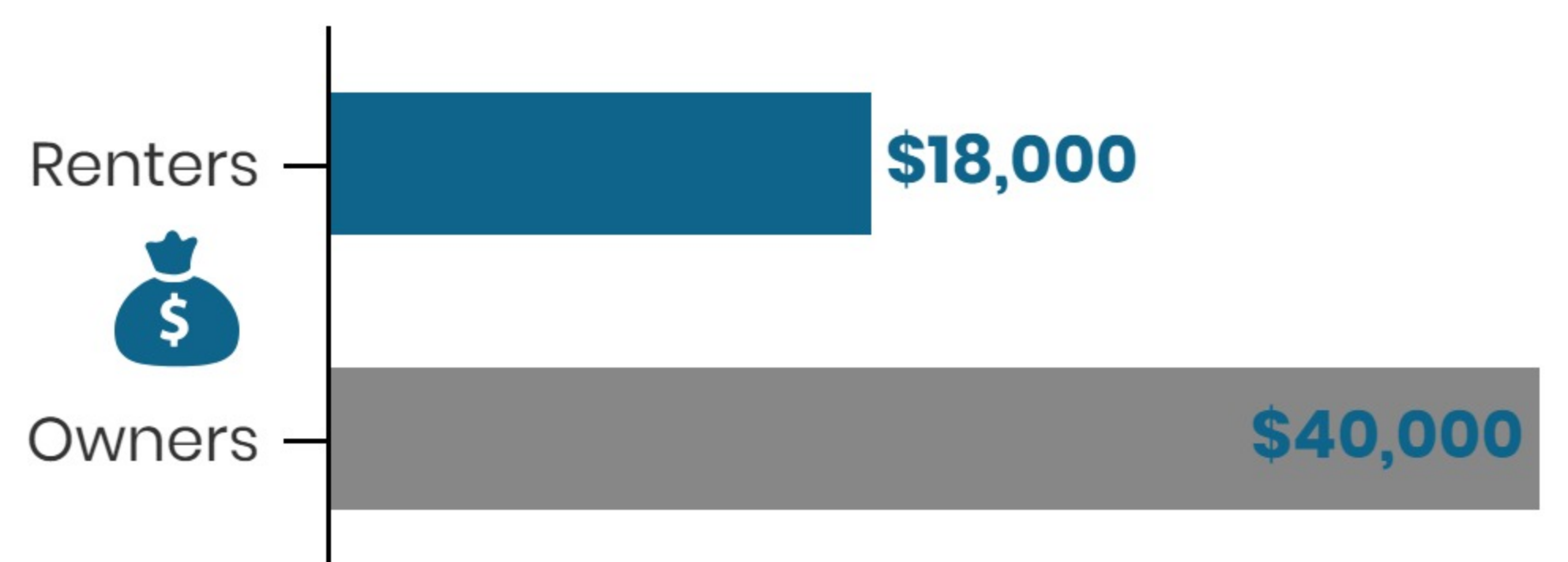
Average Tenure



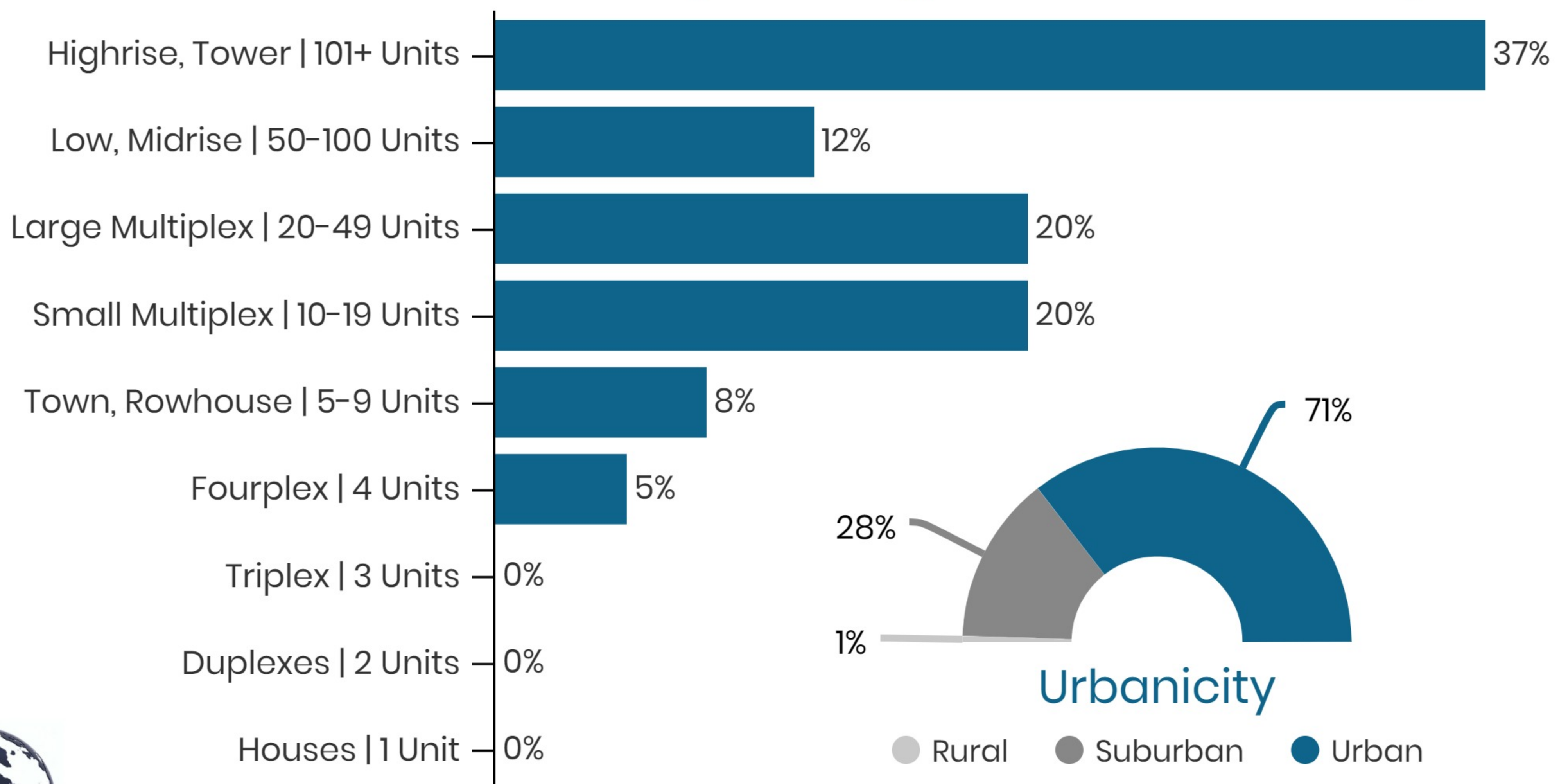
Inclination for Newer Units



Median Household Income



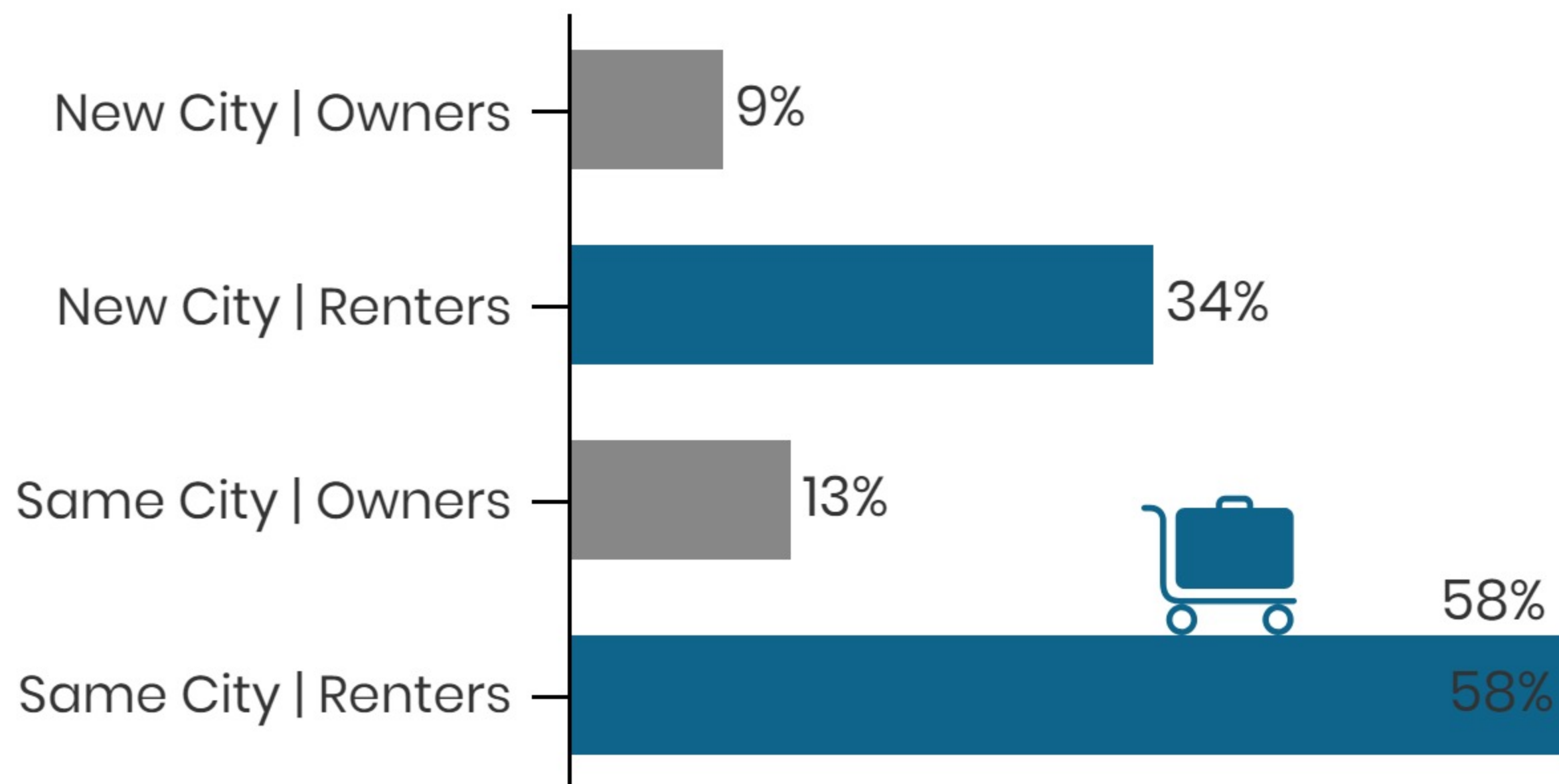
Inclination for Units by Building Size and Urbanicity



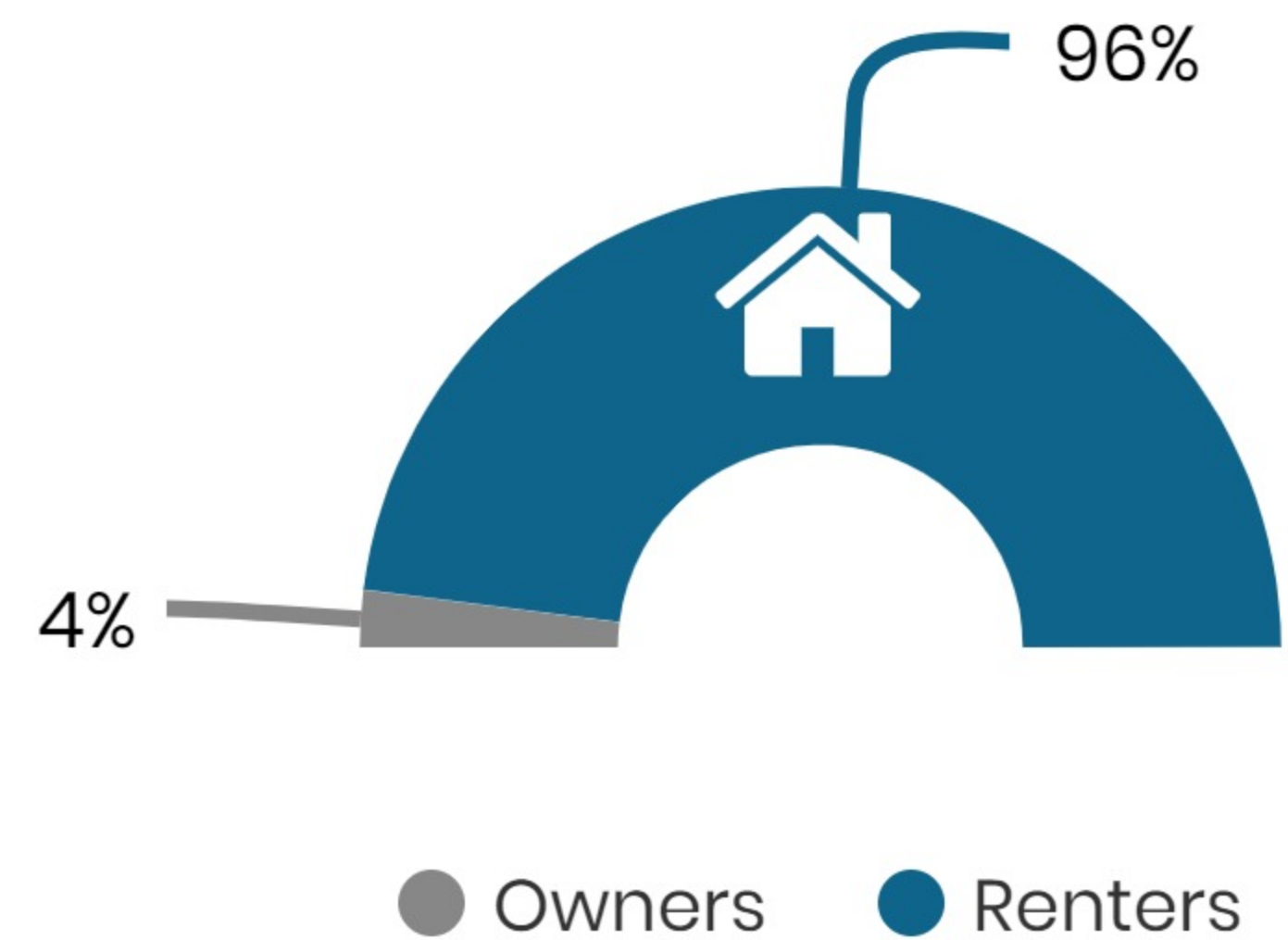
Family Troopers | O55

Lifestyles and Housing Preferences | Michigan Averages

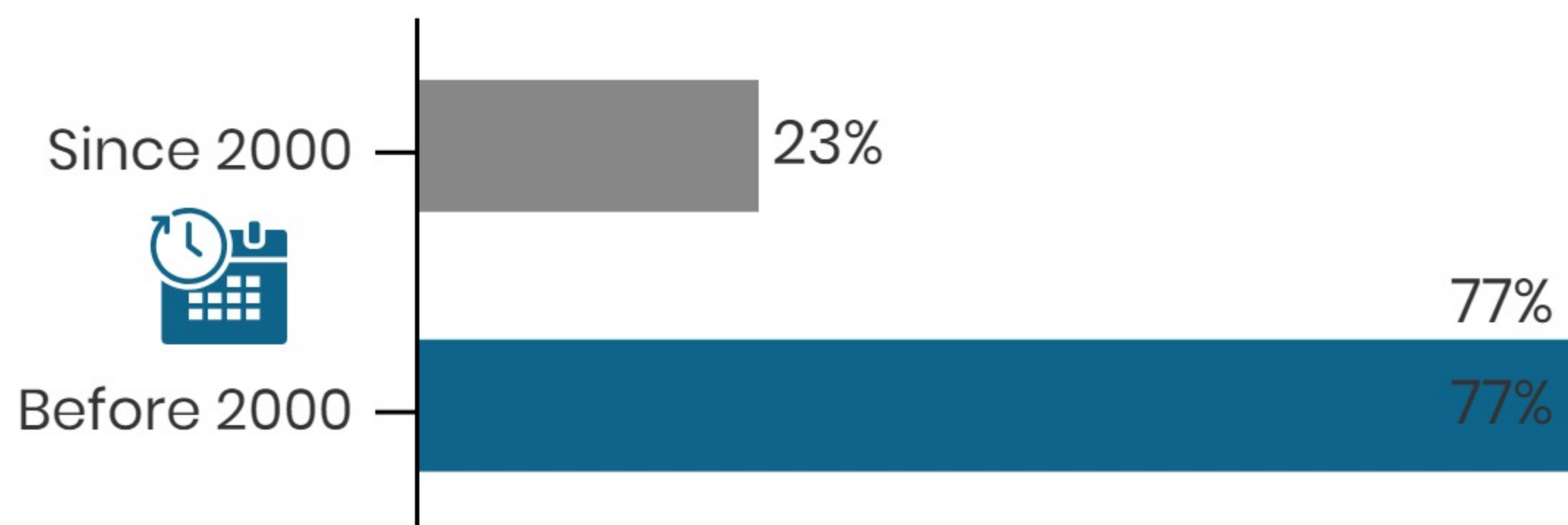
Average Annual Movership Rates



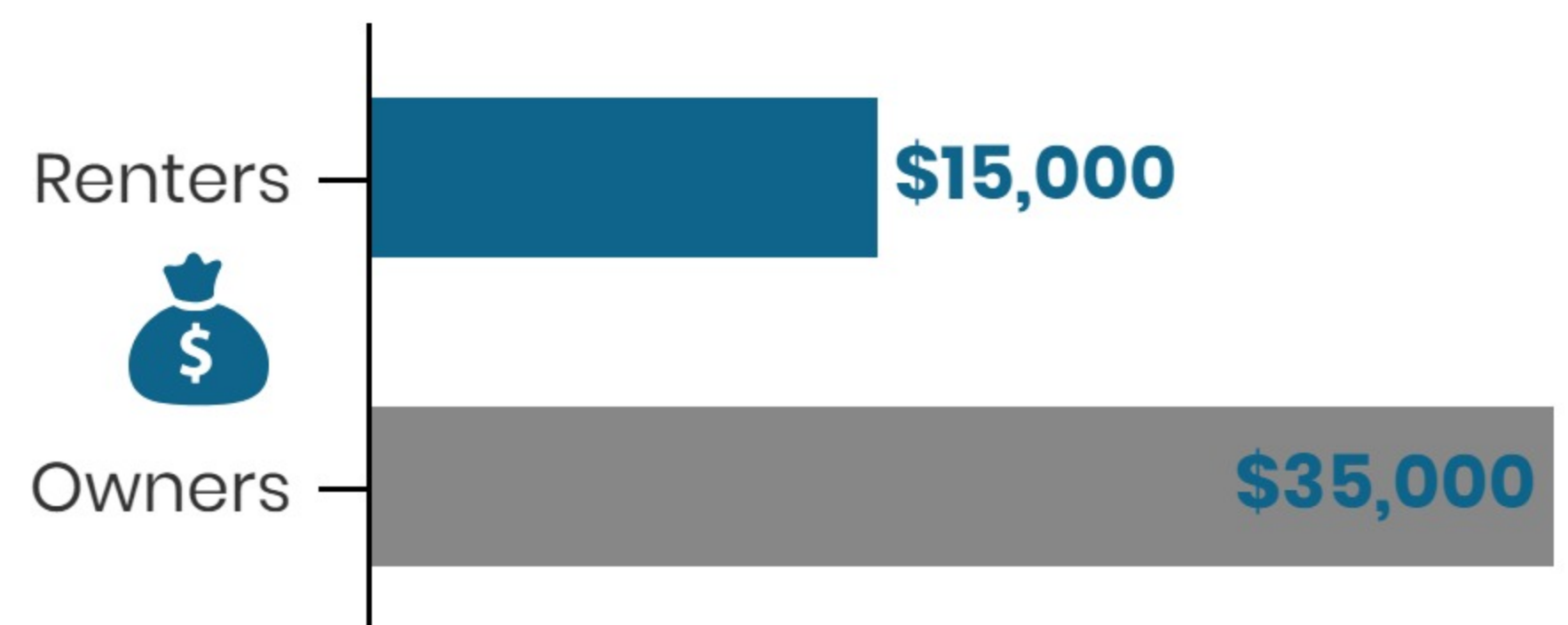
Average Tenure



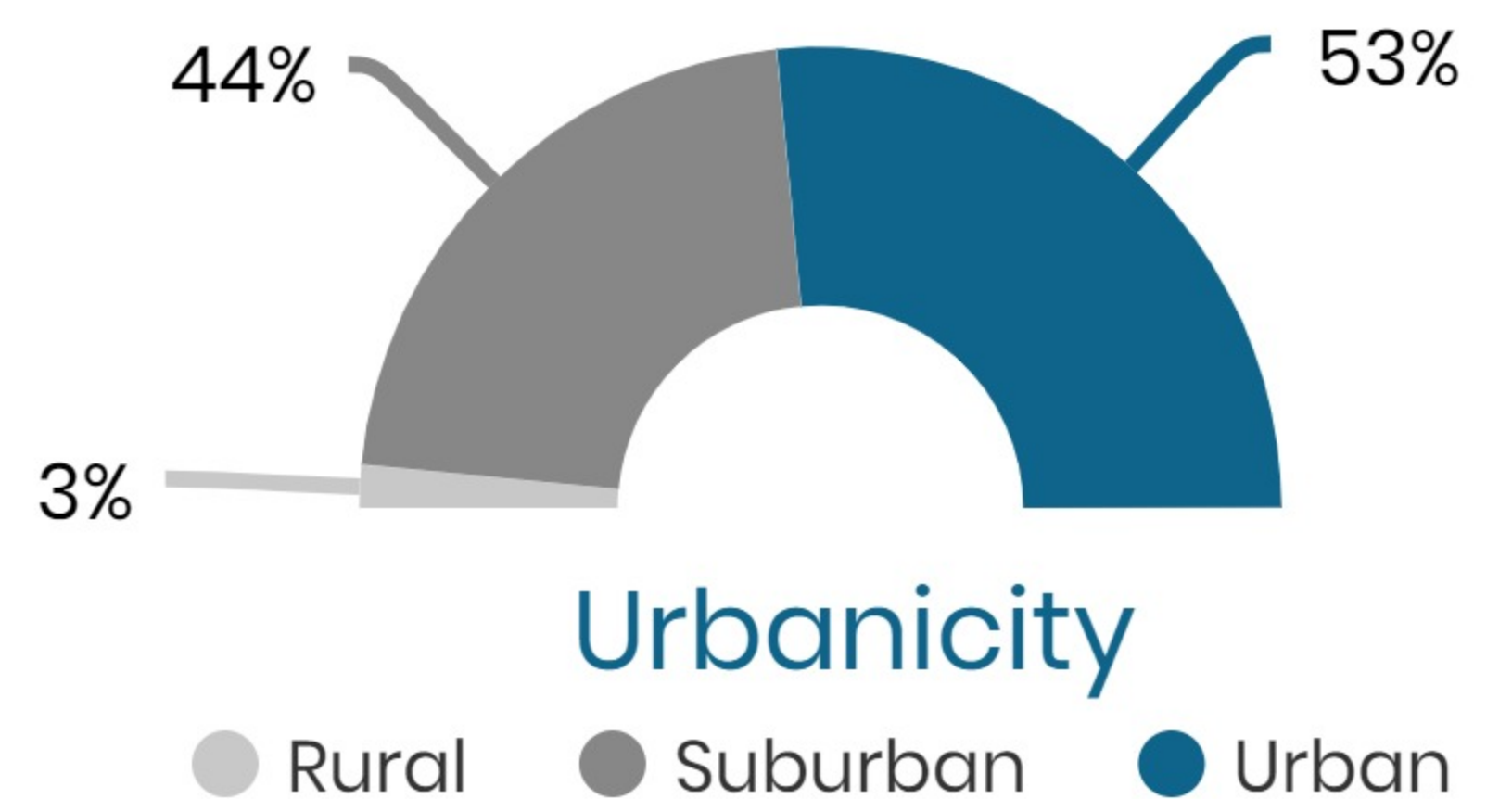
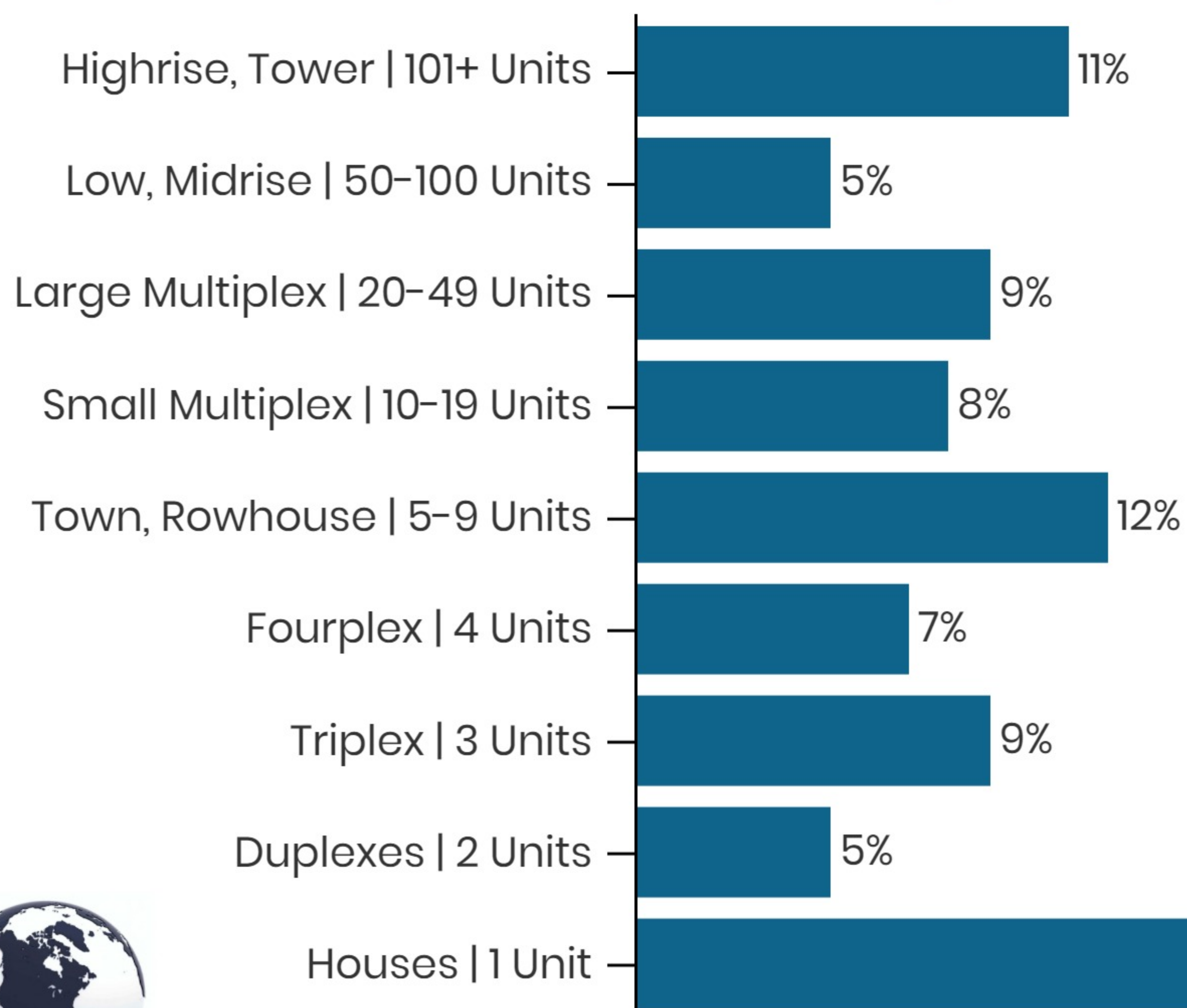
Inclination for Newer Units



Median Household Income



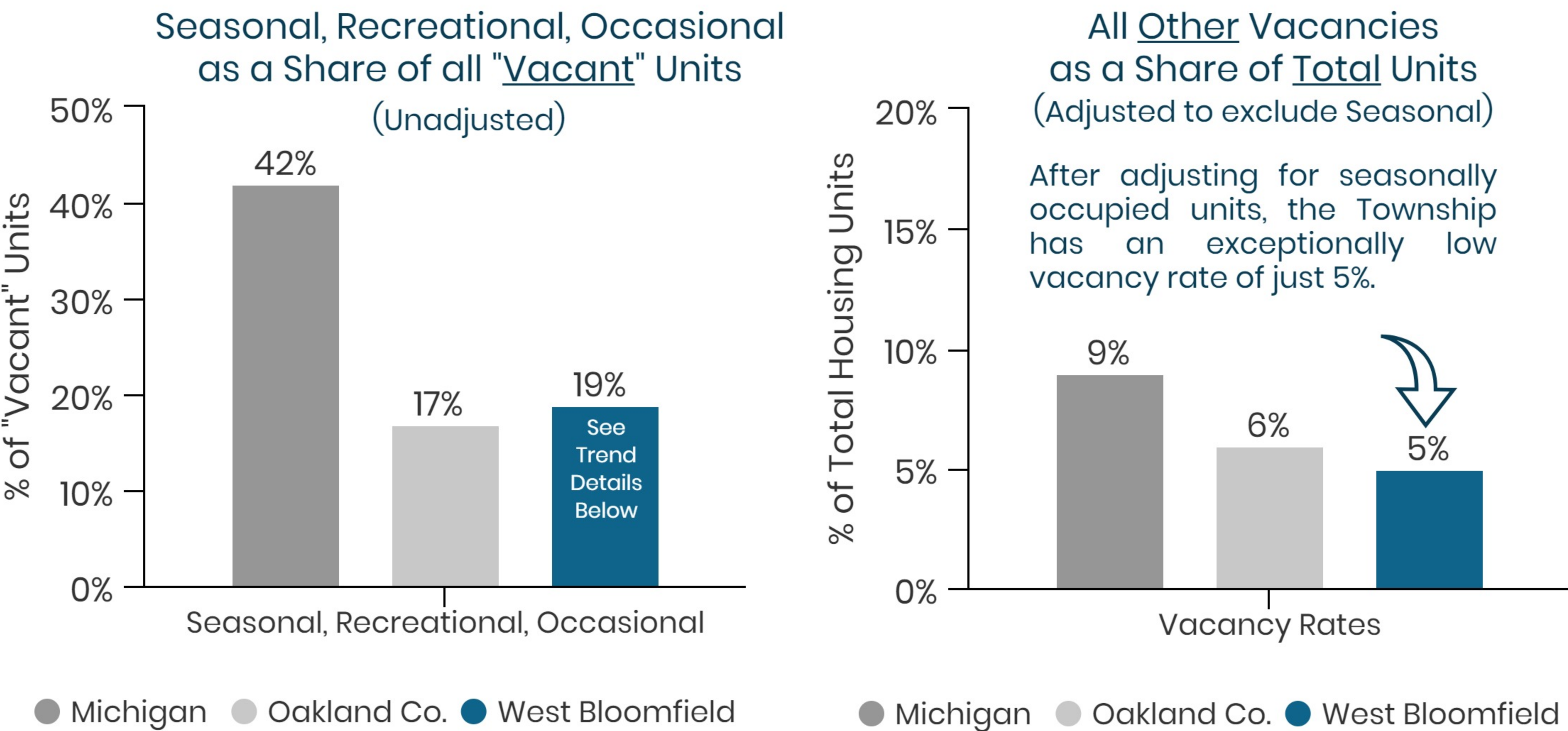
Inclination for Units by Building Size and Urbanicity



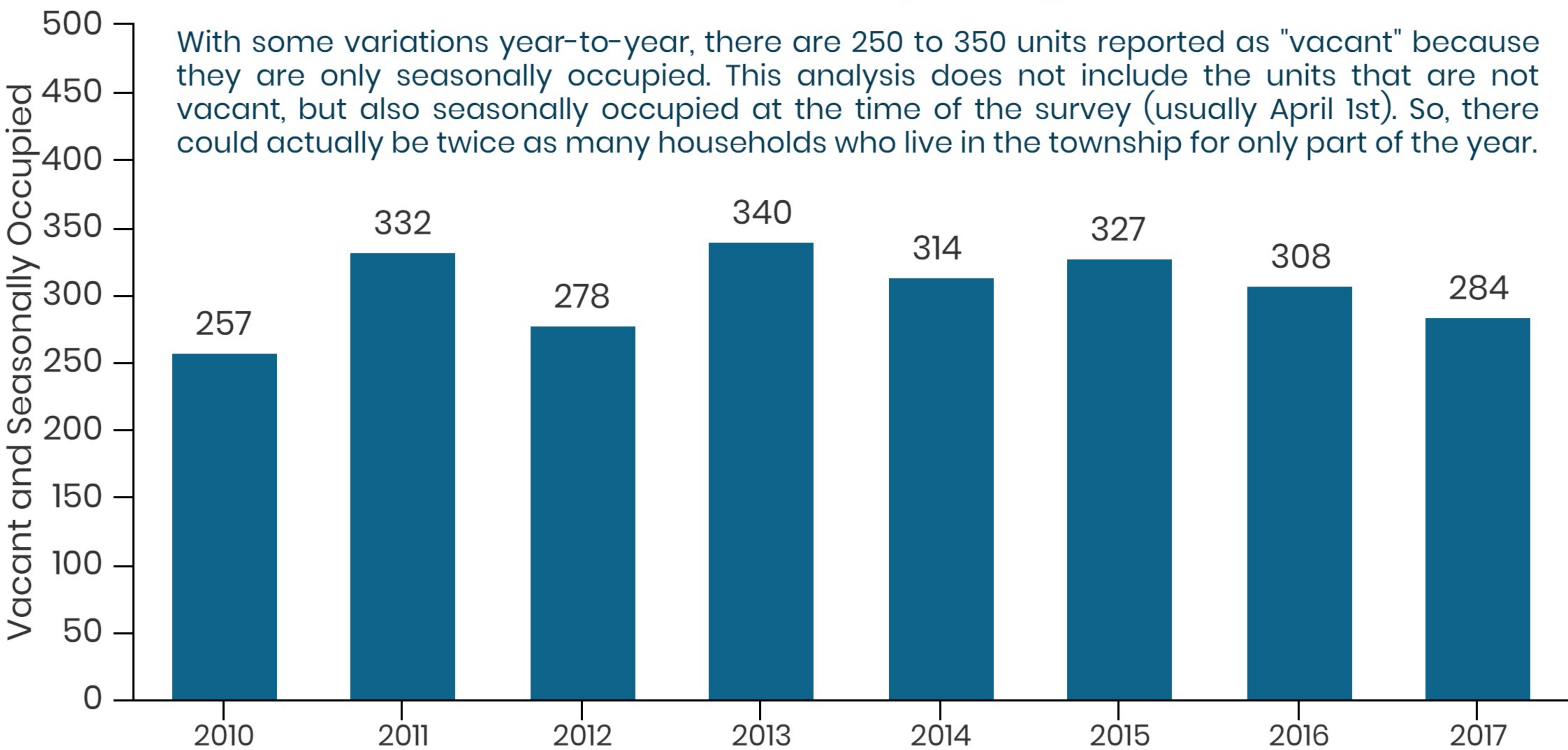
Section E
**Real Estate
Analysis**

Housing Unit Vacancies | West Bloomfield

A geographic comparison of housing vacancies, and reasons for those vacancies.



Vacant and Seasonally Occupied Units Including Recreational and Occasional Use West Bloomfield Township, Michigan



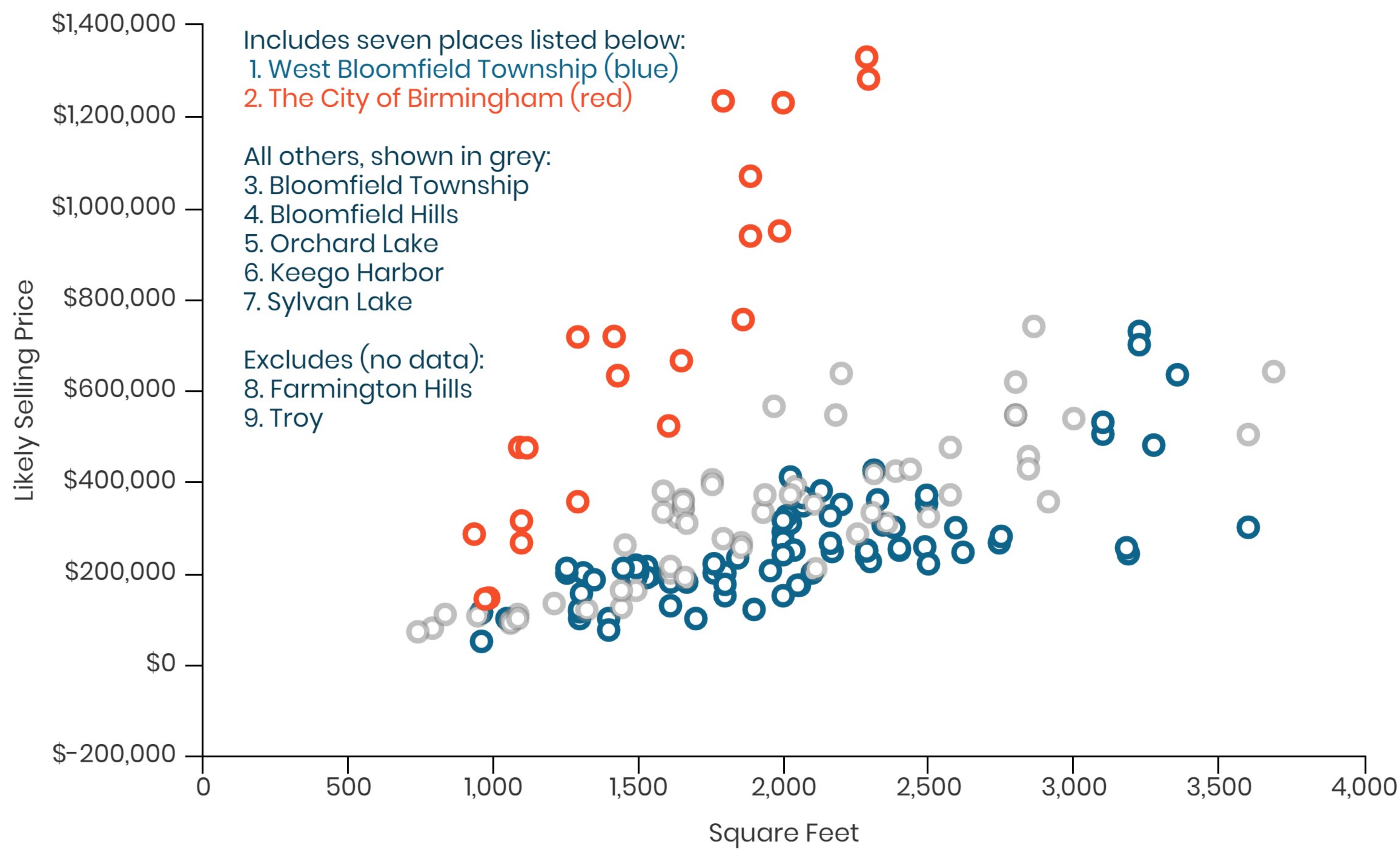
LandUseUSA
UrbanStrategies

Underlying data by the Decennial Census and American Community Survey through 2016.
Analysis and exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018.

For-Sale Choices | West Bloomfield

A comparison between selling price and square feet among attached choices only.

Likely Selling Price v. Square Feet
For-Sale Choices, Attached Units Only



As expected, the selling prices among for-sale units are directly related to the amount of available space in square feet. There are very few choices available with 1,200 square feet or less. This indicates a possible market opportunity for small cottages arranged around a courtyard; or small townhouses with vista views of waterfronts, golf courses, parks, or other attractions.

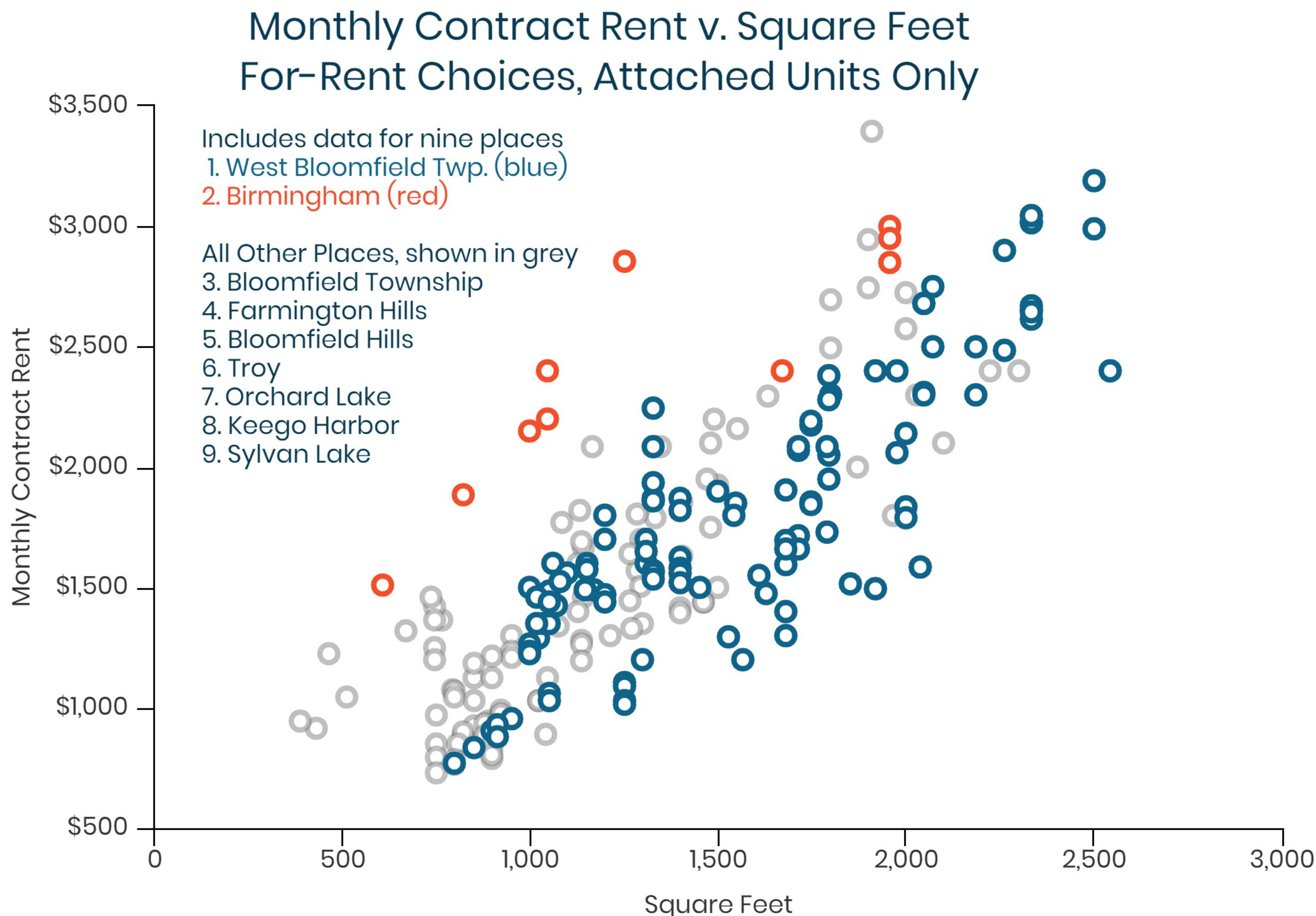
Size	Price
< 1,300 sf	< \$200,000
< 2,000 sf	< \$300,000
< 2,800 sf	< \$500,000



Underlying data is based on field research, phone surveys, and assessors records. Analysis and exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018.

For-Rent Choices | West Bloomfield

A comparison between contract rent and square feet among attached choices only.



As expected, the contract rents among for-lease units are directly related to the amount of available space in square feet. The vast majority of choices are 750 to 2,000 square feet.

There are four units with about 3,000 square feet of space, not shown on the chart. Most households that can afford 3,000 square feet are also more inclined to buy an attached townhouse or detached house.

There is a market gap and opportunity for new moderately-priced units with 600 to 1,050 square feet; and luxury units with up to 1,750 square feet. The smaller units should have relatively attainable prices (contract rents) in the range of \$900 to \$1,500 per month. The larger units could command significantly higher rents.

Note: Contract rent may also be referred to as "cash rent" and typically excludes utilities and extra fees for pets, parking and storage, memberships, and security and cleaning deposits. These items are usually included in gross rents.



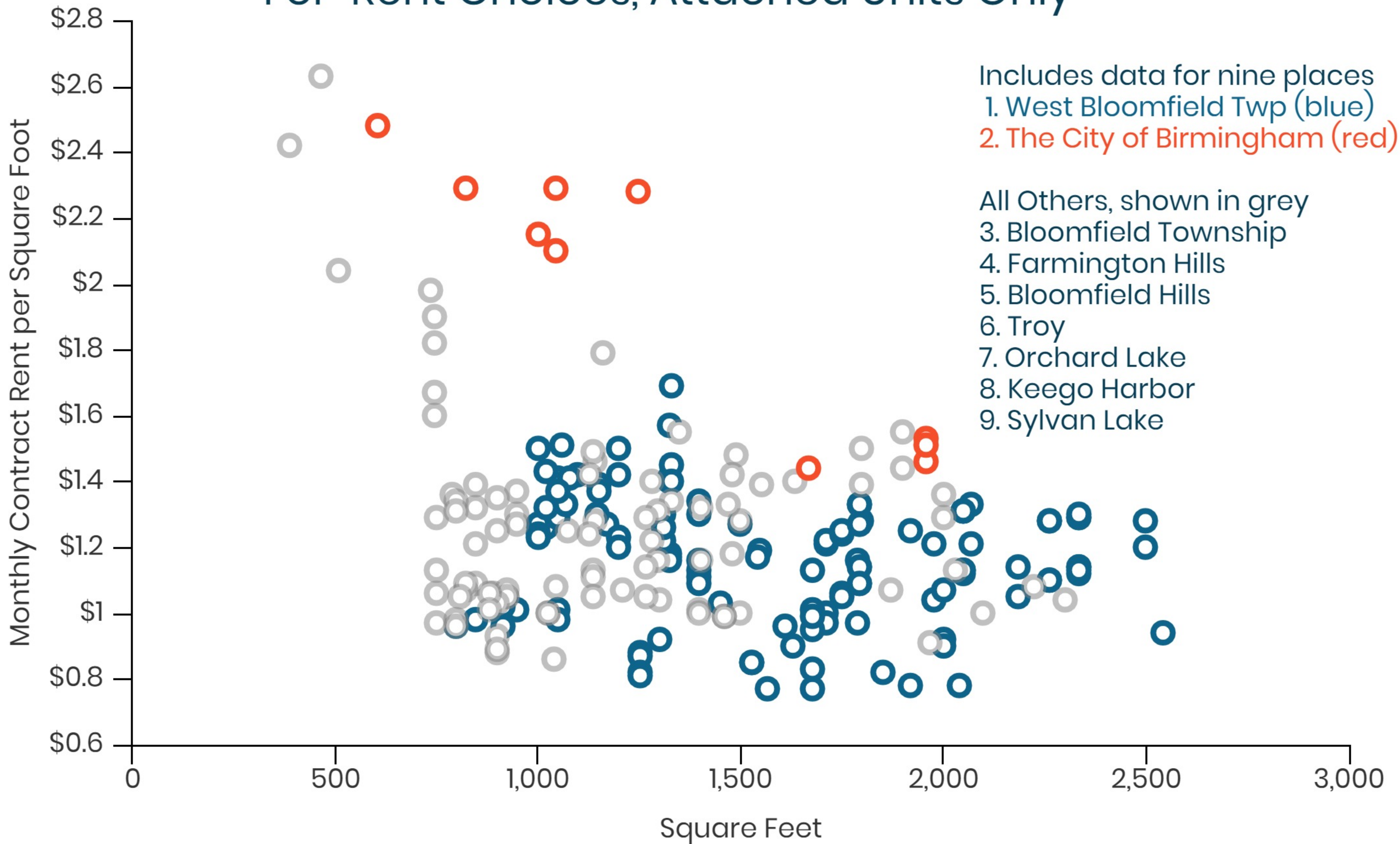
LandUseUSA
UrbanStrategies

Underlying data is based on field research, phone surveys, and assessors records. Analysis and exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018.

For-Rent Choices | West Bloomfield

A comparison between contract rent per square foot among attached choices only.

Contract Rent/Sq. Ft. versus Square Feet
For-Rent Choices, Attached Units Only



Observations: As expected, the contract rents among for-lease units are inversely related to the amount of available space in square feet. In other words, smaller units can be expected to capture a higher rent per square unit. This relationship should be leveraged by developers to offset the costs of building kitchens and bathrooms in smaller units. By building smaller units, developers can maximize the total number of units in each building. The result should be higher net revenues and profits for the investors, and more choices for migrating households seeking attainably-priced housing.

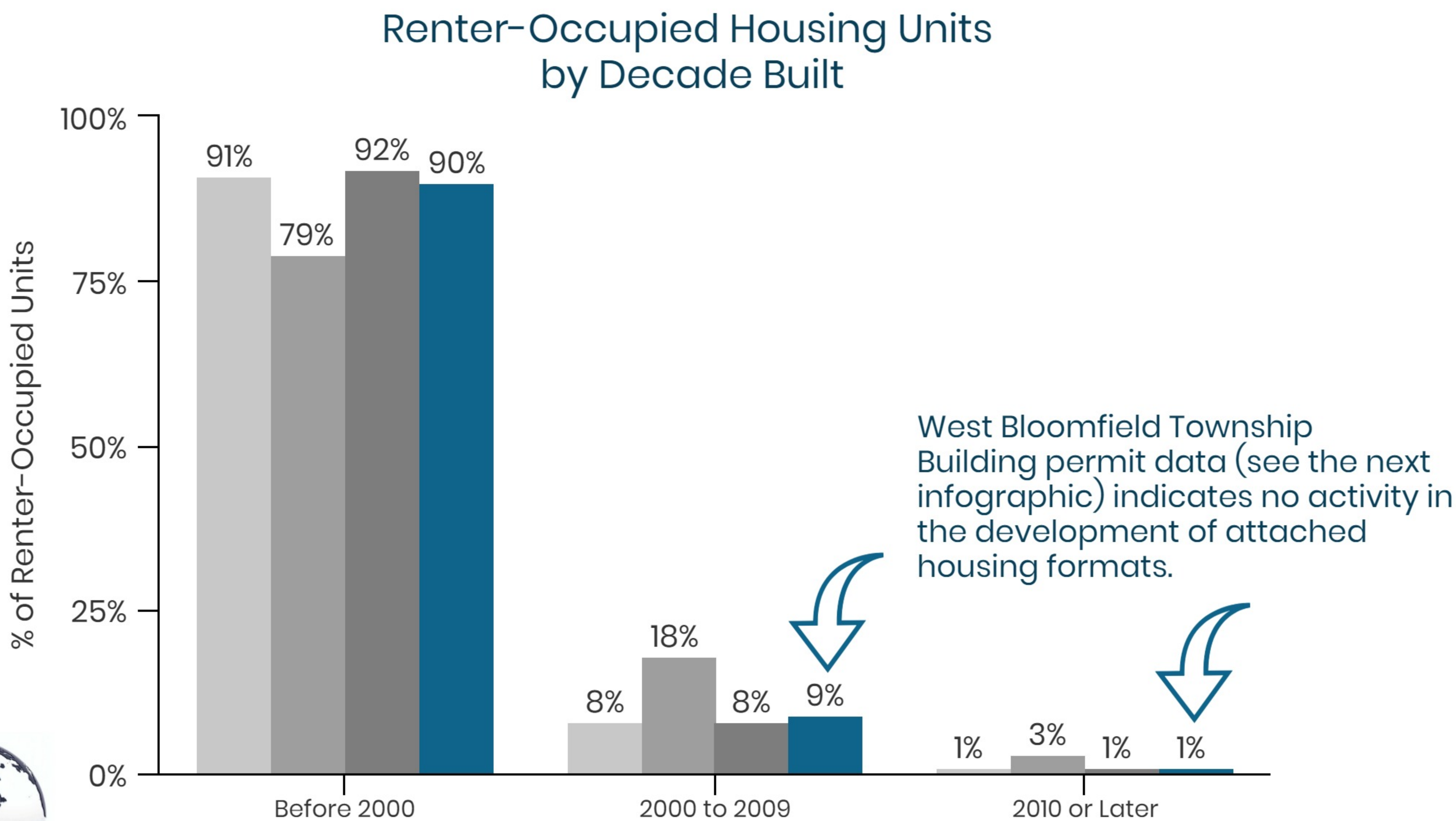
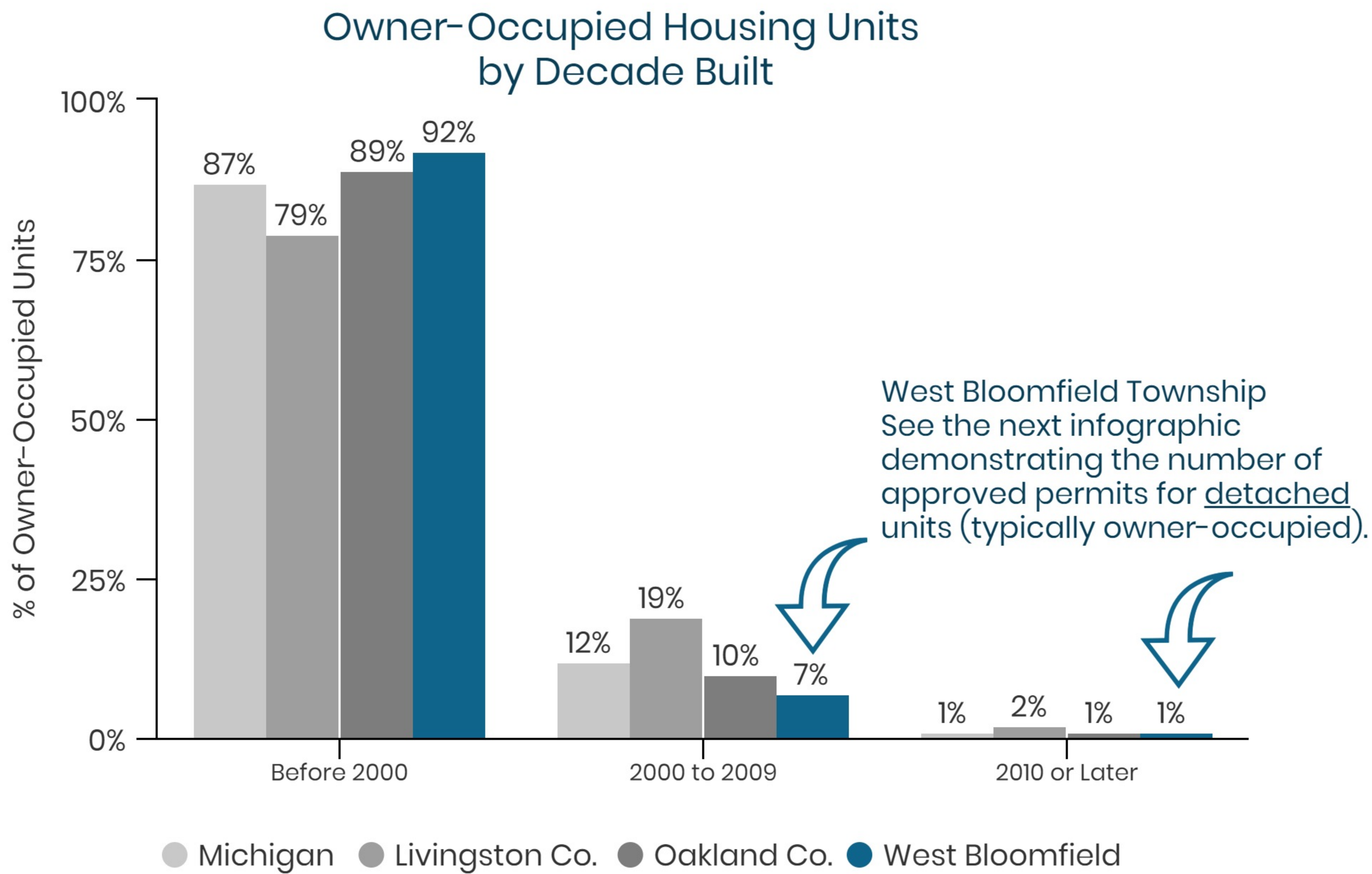
There are very few units in West Bloomfield Township with less than 1,000 square feet of space. This suggests an opportunity and possible need - particularly in locations like lakefronts where prospective residents might seek seasonal second homes. Smaller units can also meet the need for affordability and choices that are attainably-priced for low-to-moderate income households.

Note: Contract rent may also be referred to as "cash rent" and typically excludes utilities and extra fees for pets, parking and storage, memberships, and security and cleaning deposits. These types of fees are usually included in gross rents.



Age of Housing Stock | West Bloomfield

A comparison of existing housing units by tenure and decade built.

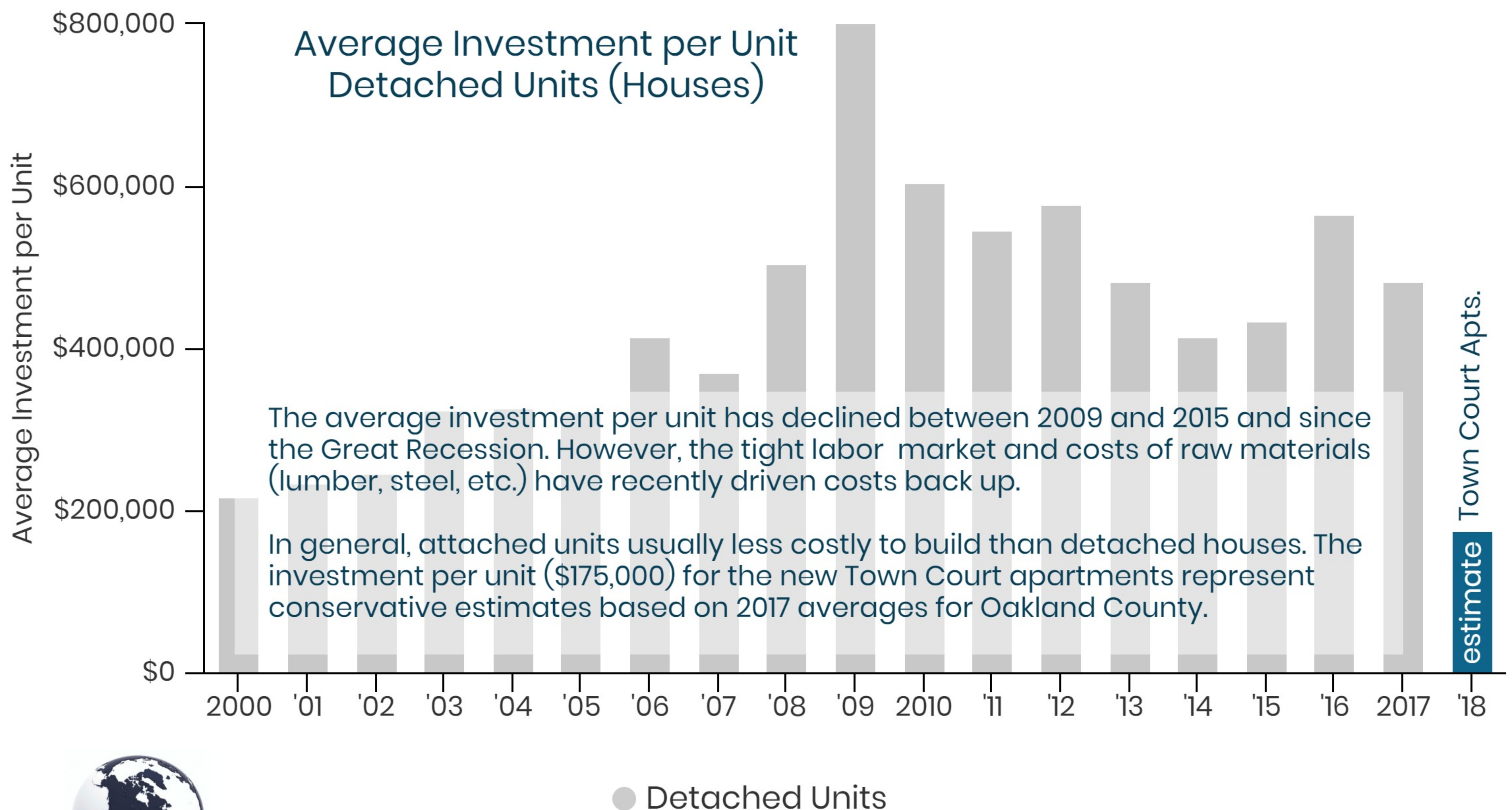
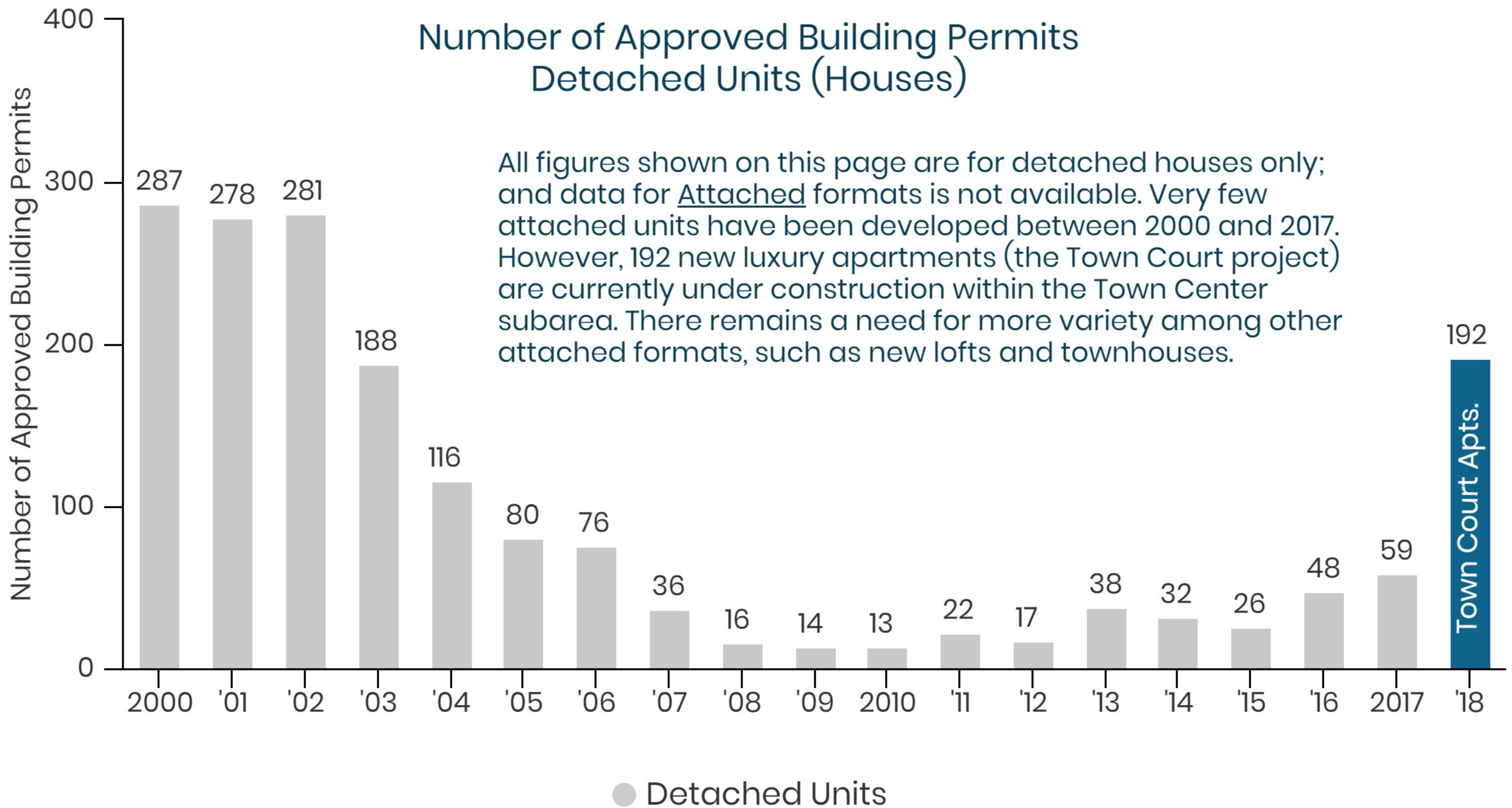


LandUseUSA
UrbanStrategies

Underlying data by the Decennial Census and American Community Survey through 2016.
Analysis and exhibit prepared by LandUseUSA © on behalf of West Bloomfield, 2018.

Building Permit Survey | West Bloomfield

An assessment of approved building permits and investment per unit over time.

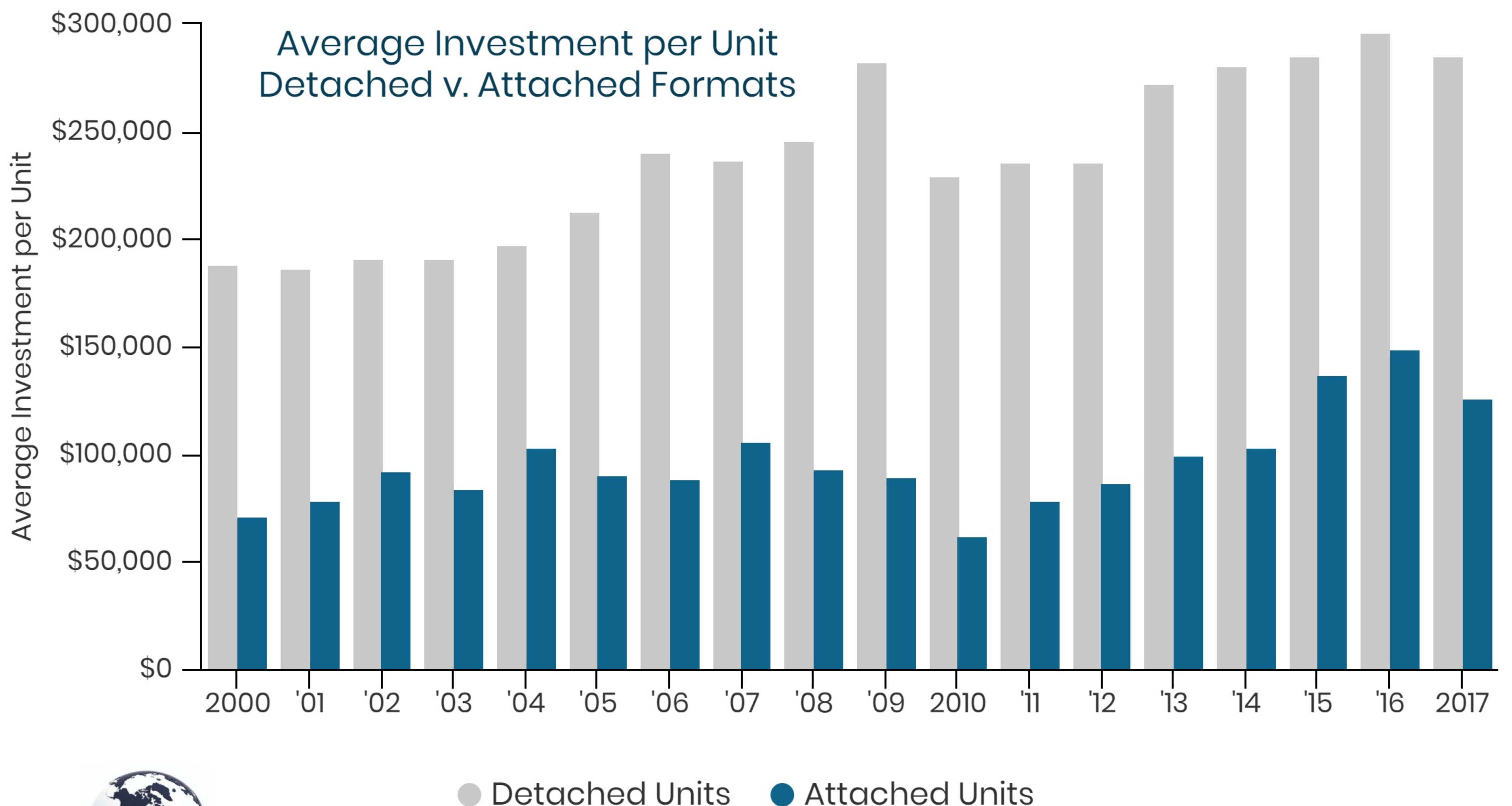
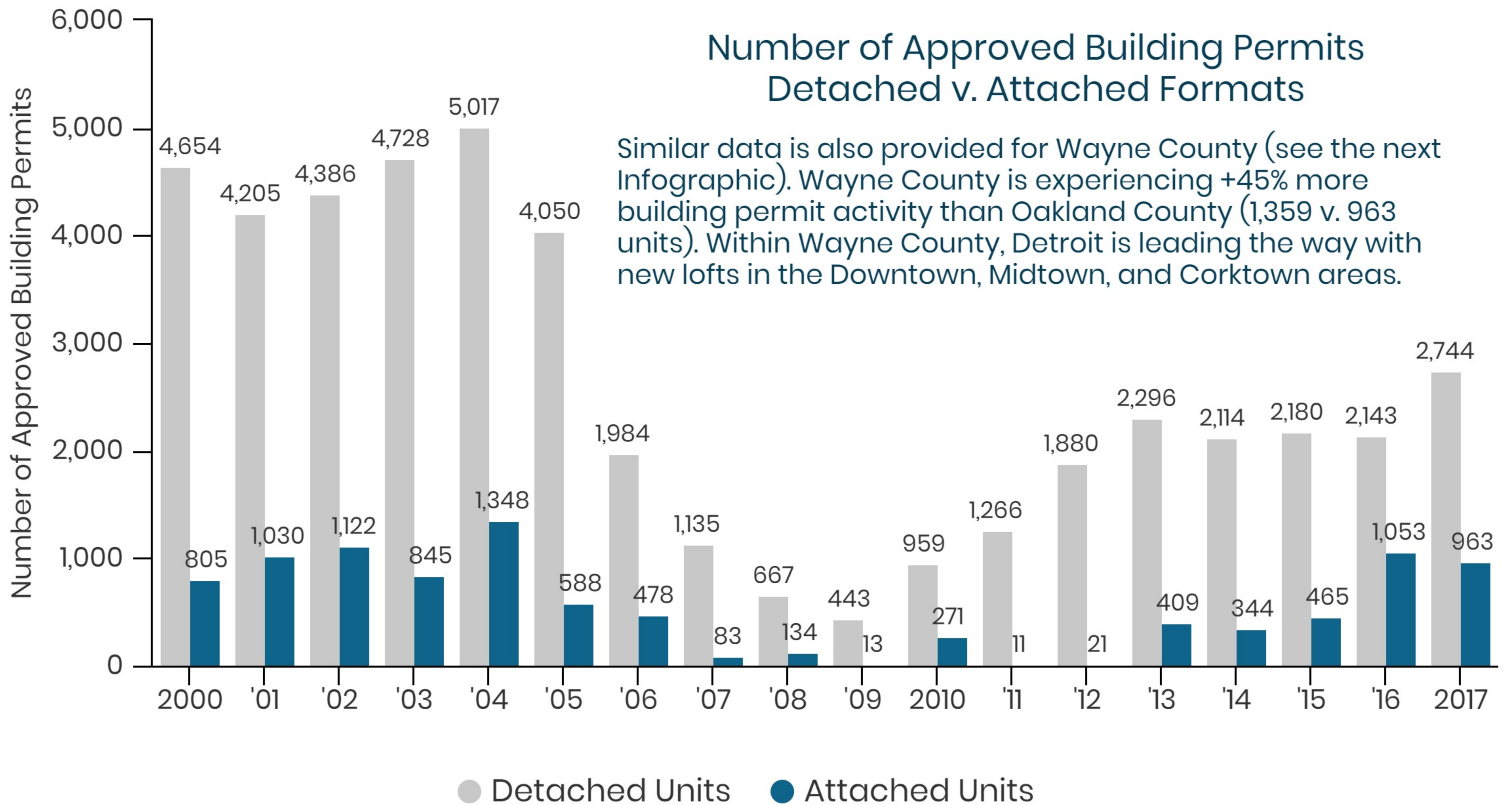


LandUseUSA
UrbanStrategies

Underlying data by the Census Bureau's Building Permits Survey through the year 2017.
Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township; 2018.

Building Permit Survey | Oakland County

An assessment of approved building permits and investment per unit over time.

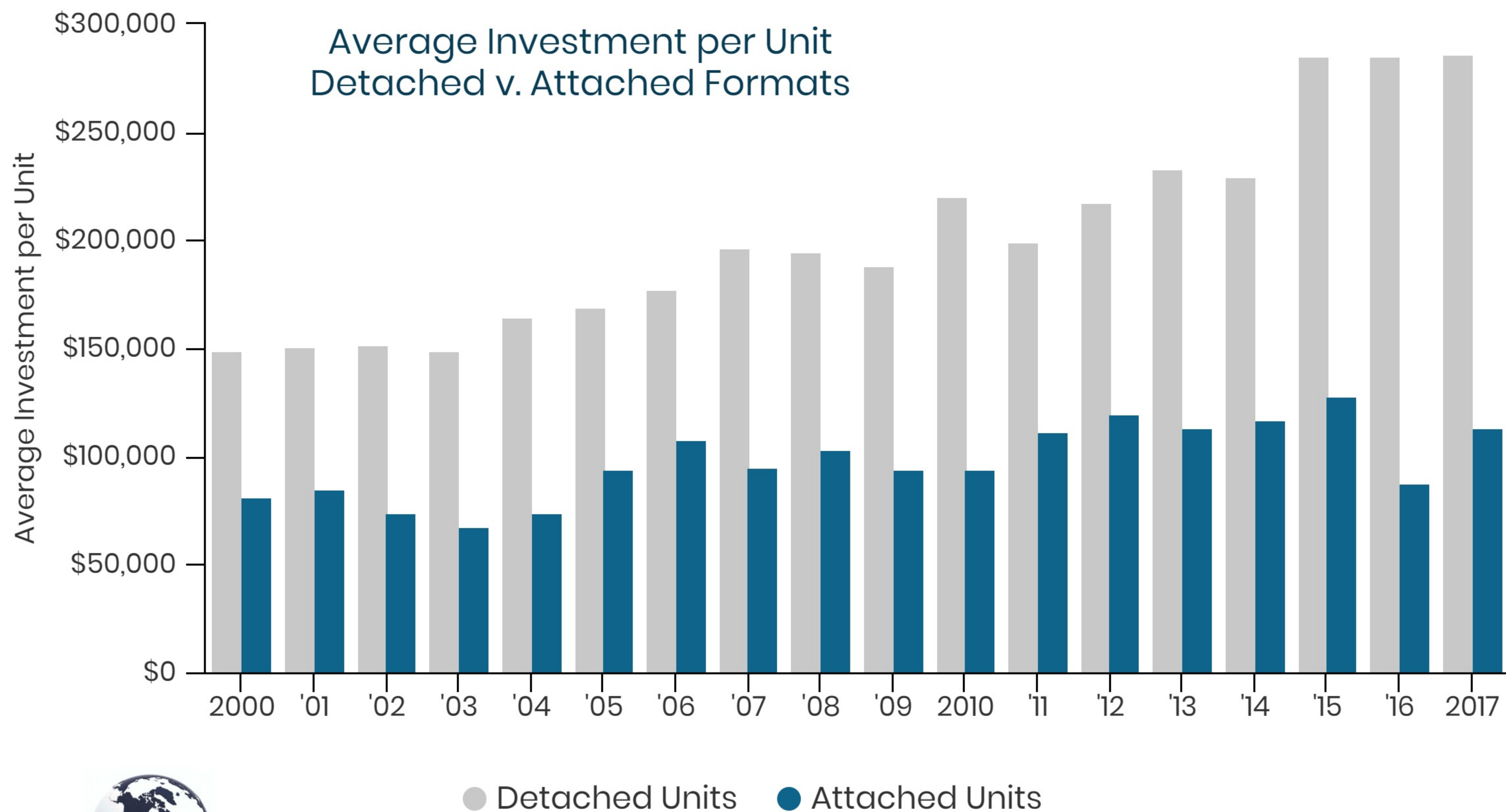
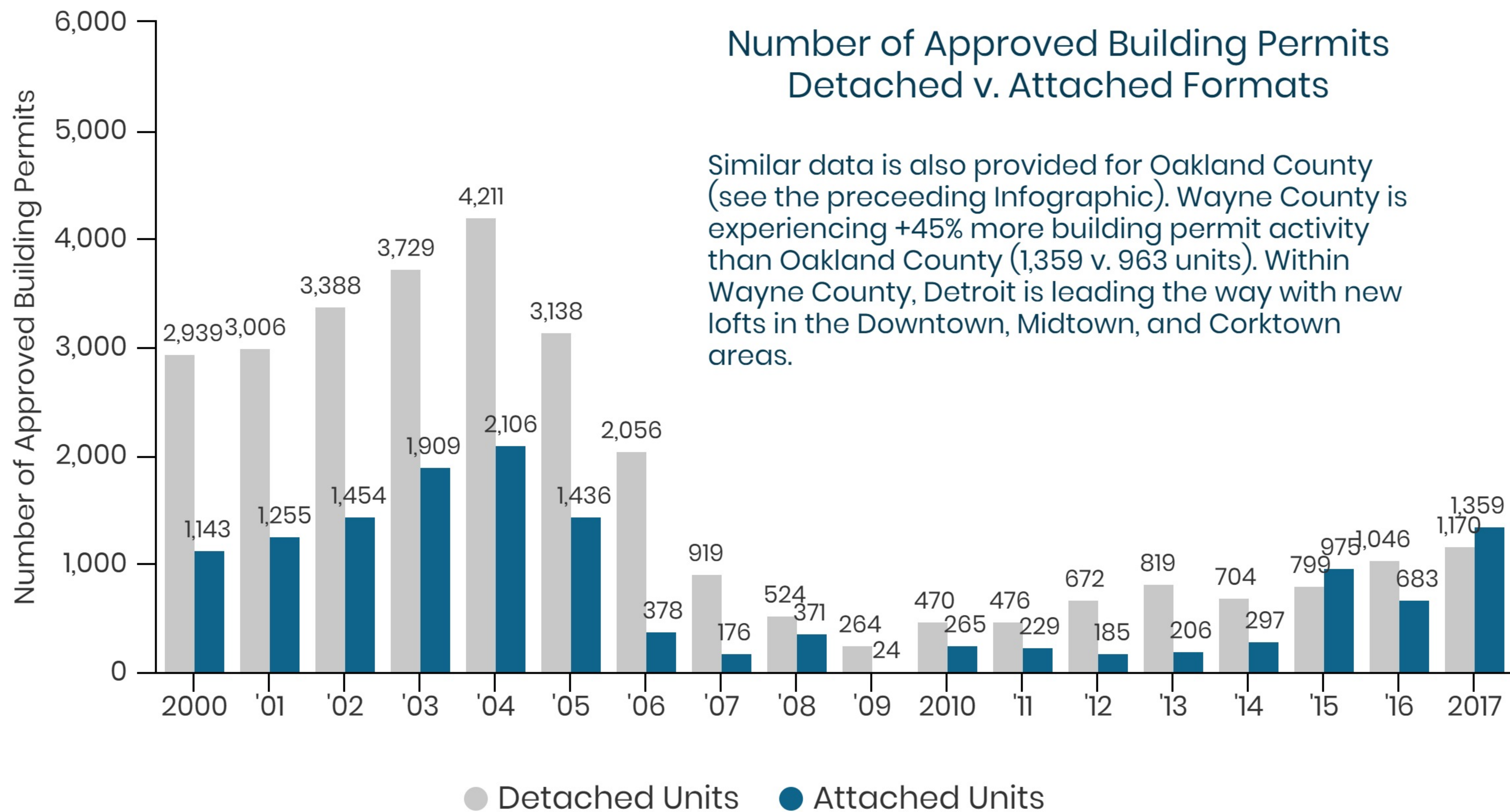


LandUseUSA
UrbanStrategies

Underlying data by the Census Bureau's Building Permits Survey through the year 2017.
Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township; 2018.

Building Permit Survey | Wayne County

An assessment of approved building permits and investment per unit over time.



LandUseUSA
UrbanStrategies

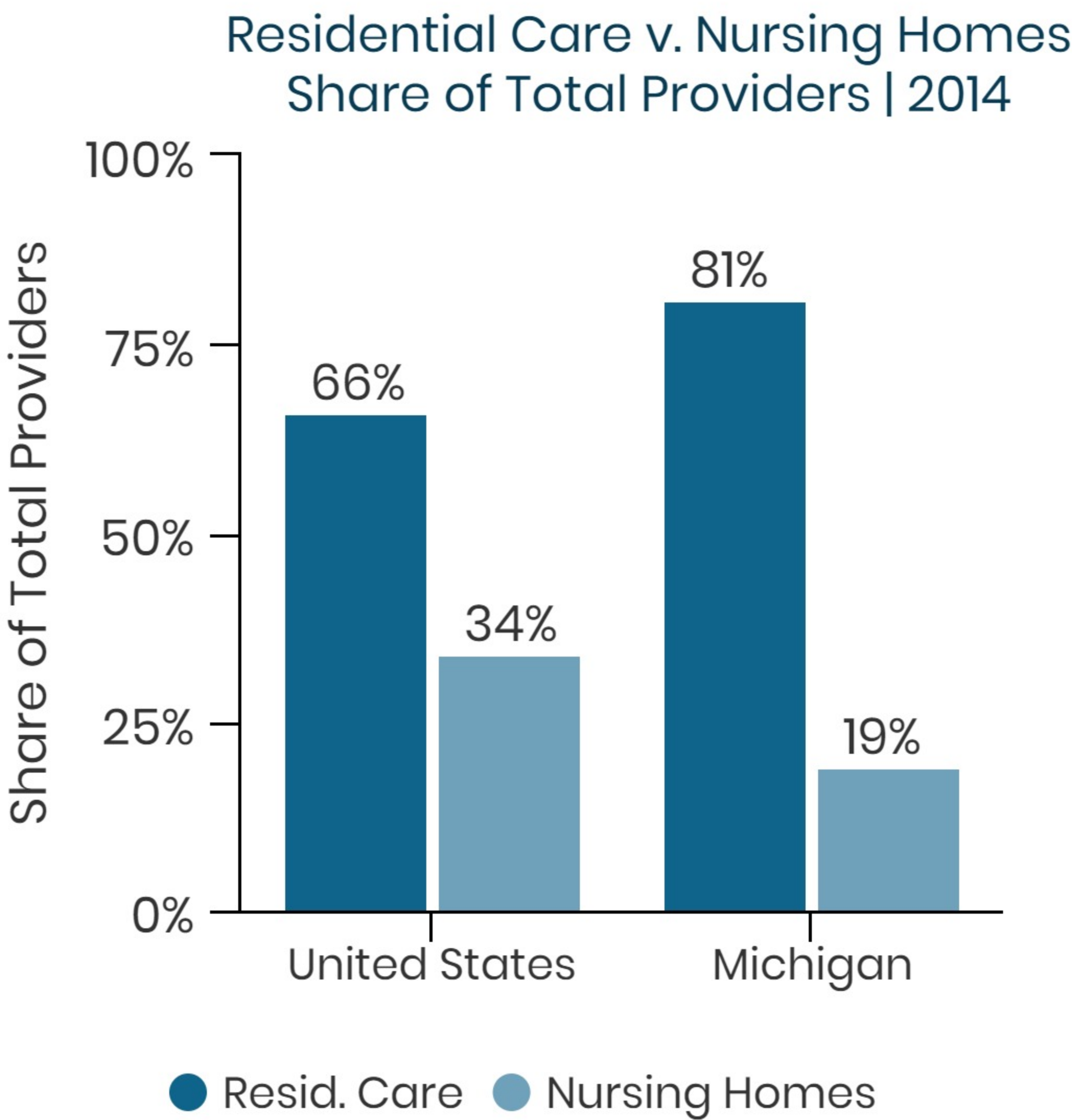
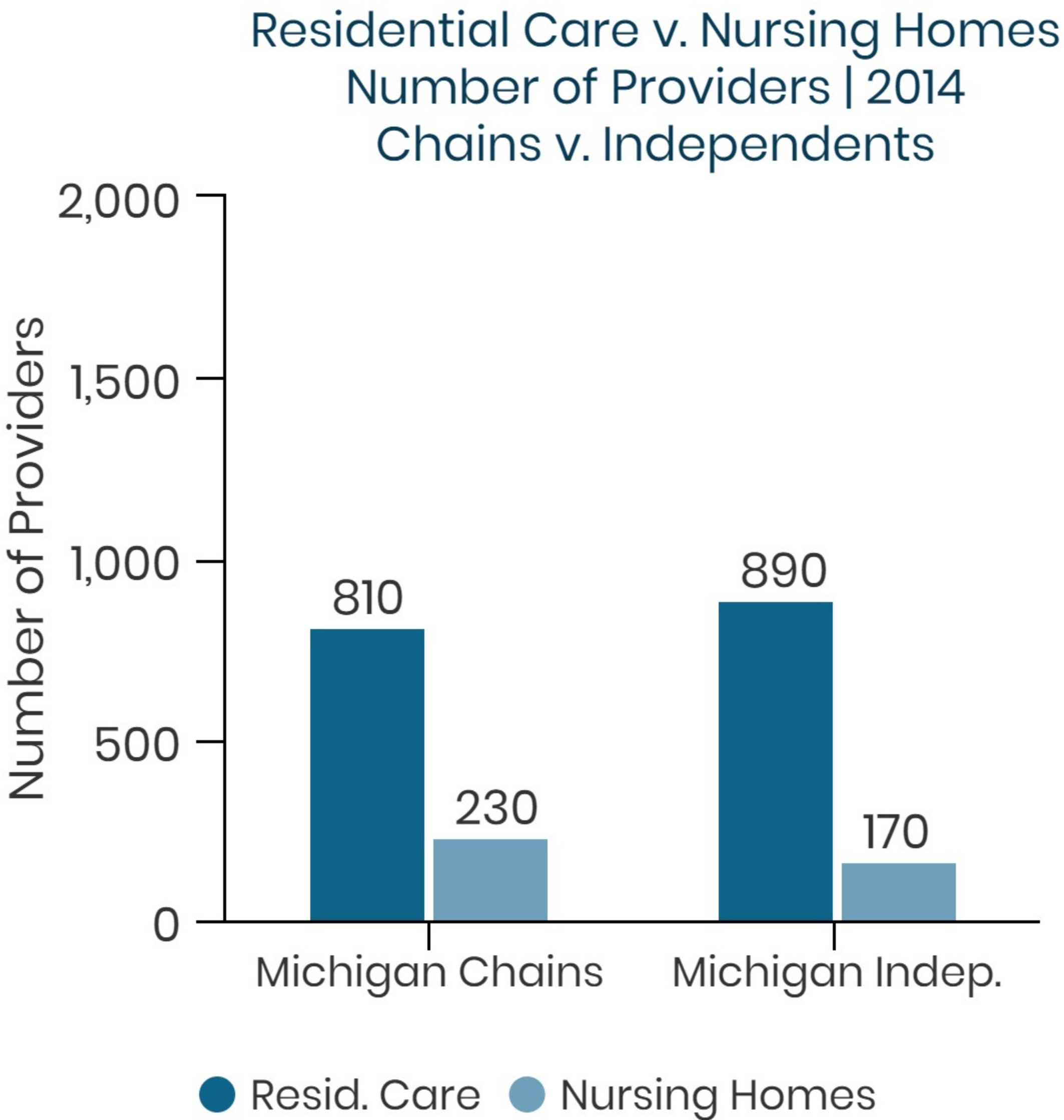
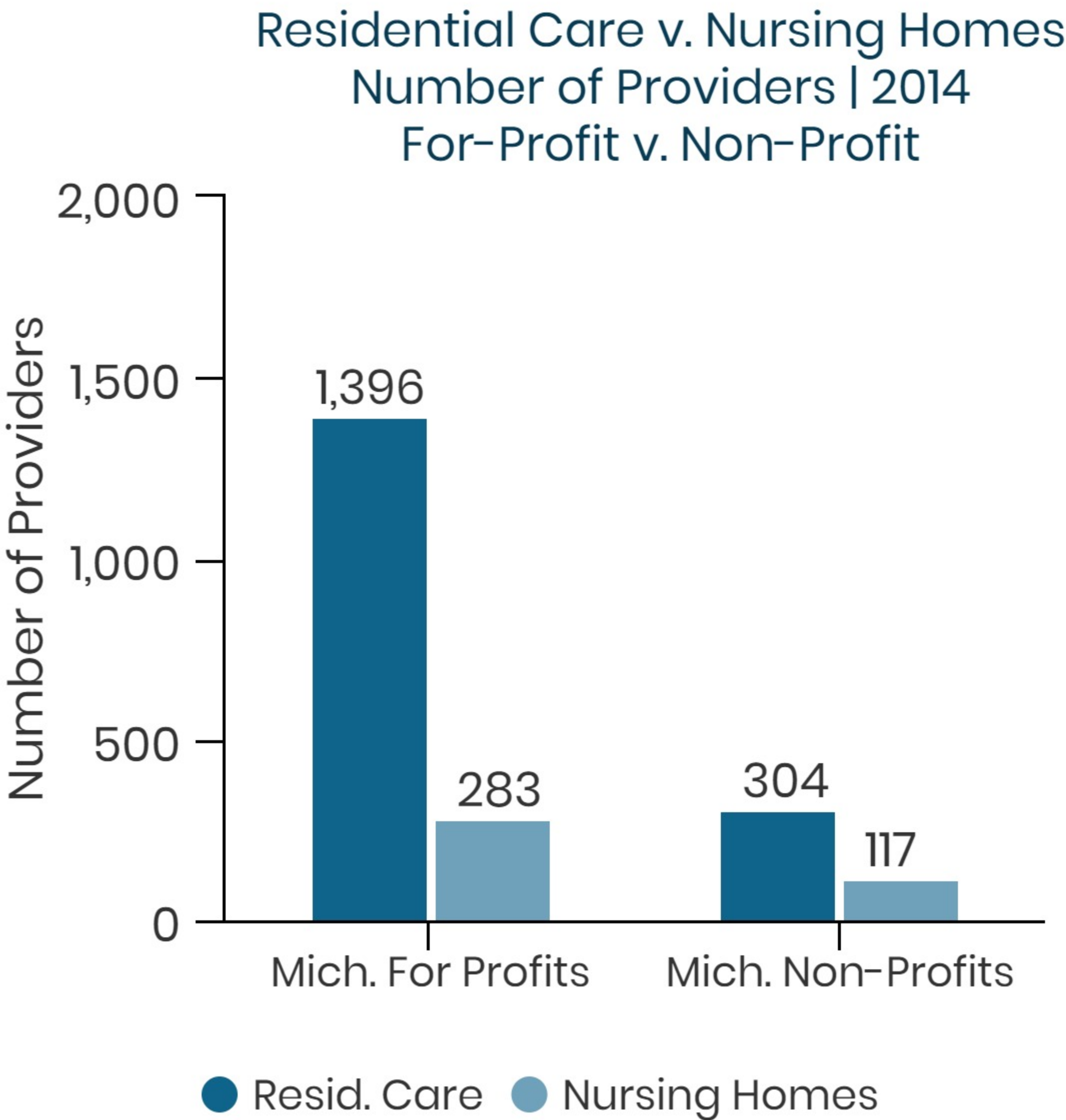
Underlying data by the Census Bureau's Building Permits Survey through the year 2017.
Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township; 2018.

Section **F**

Continuing Care Facilities

Continuing Care Facilities | Michigan

Long-term care providers (brick & mortar establishments) by type.



Continuing Care Retirement Facilities

- 1. Residential Care** Communities
Independent Living
Assisted Living
may include some Dementia Care
- 2. Nursing Homes**
Rehabilitation Services
Physical, Occupational Therapy
specialized Alzheimer Care
similar Institutions

Excludes:
- Hospice Centers
- Adult Day Care Centers
- Home Care Service Providers



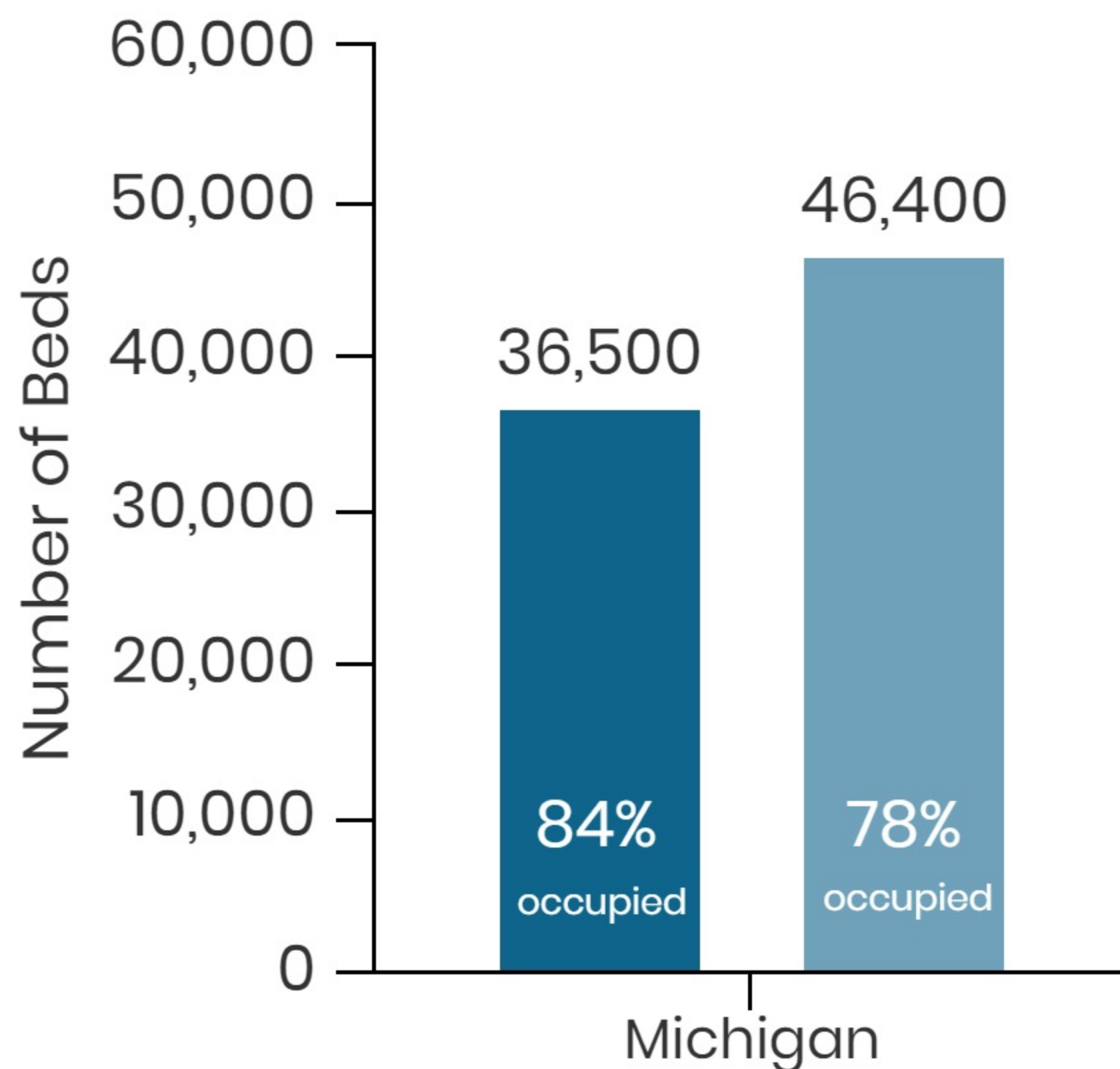
LandUseUSA
UrbanStrategies

Underlying data by the U.S. Dept. of Health & Human Services, National Center for Health Statistics, 2016. Analysis and exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018. All terminology is consistent with national and statewide data reporting standards, and might not perfectly match local nomenclature.

Long Term Care Providers | Michigan

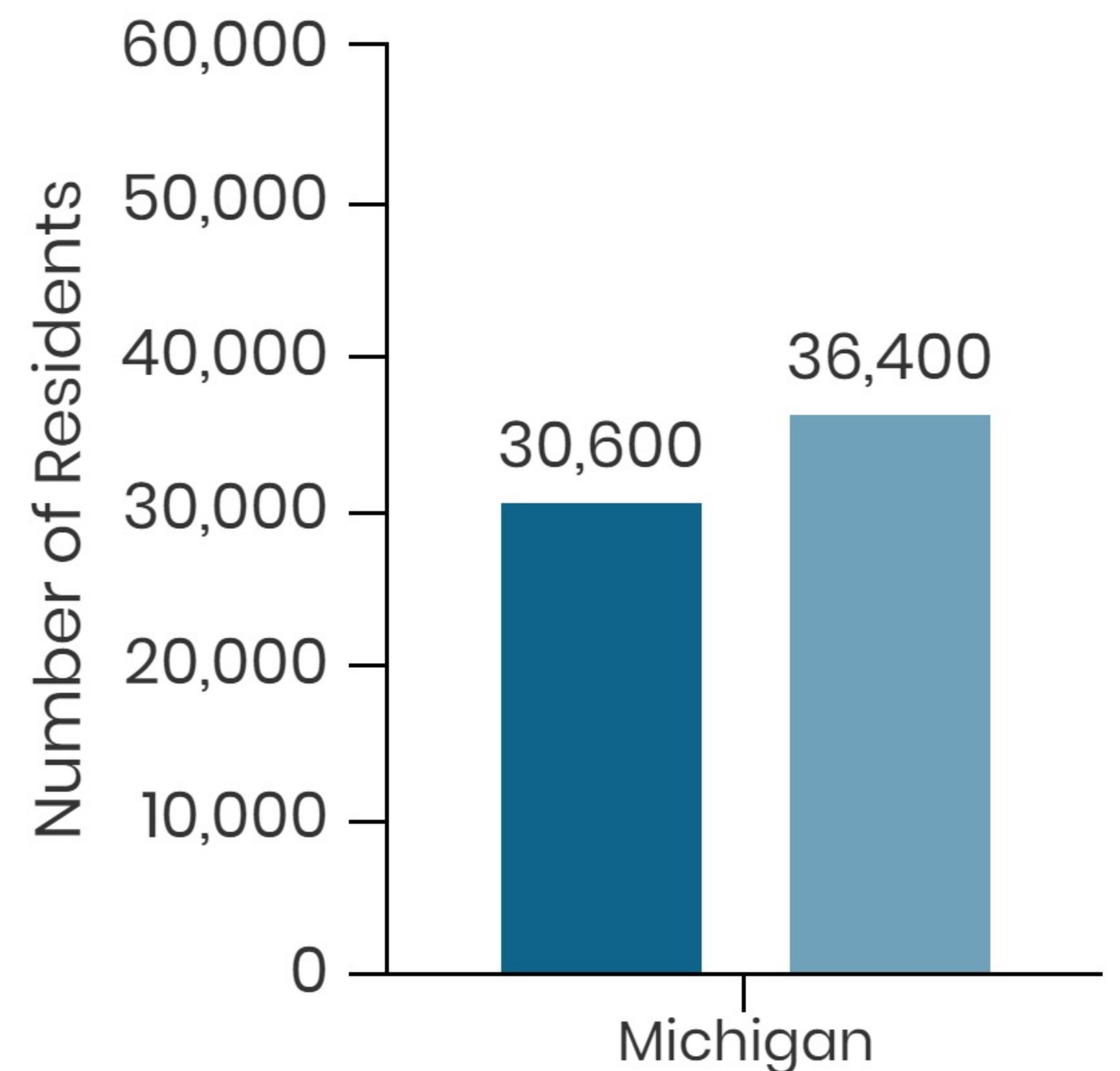
A comparison of capacity in beds and residents served in the State of Michigan.

Residential Care v. Nursing Homes
Capacity, Number of Beds | 2014



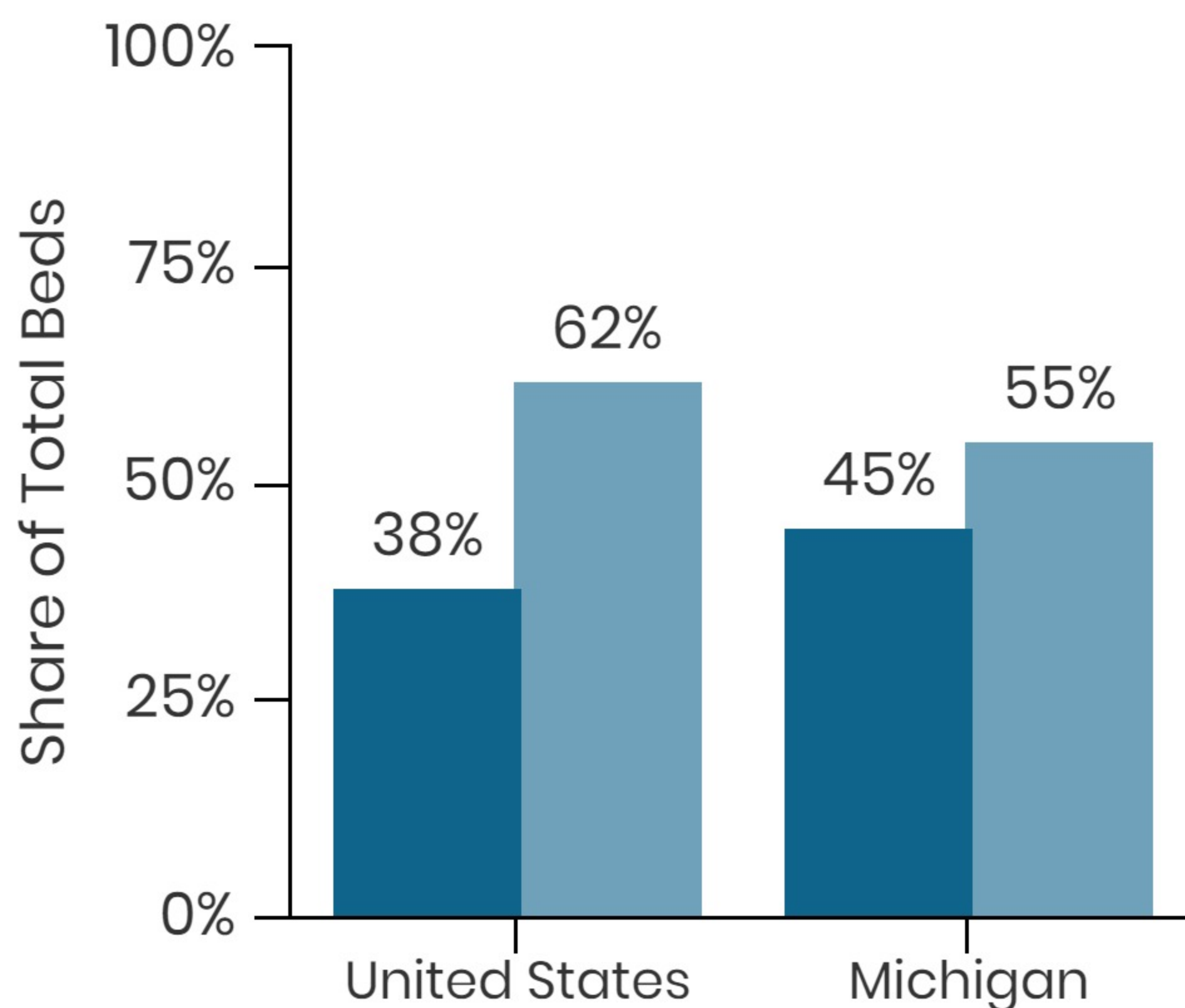
● Resid. Care ● Nursing Homes

Residential Care v. Nursing Homes
Number of Residents Served | 2014



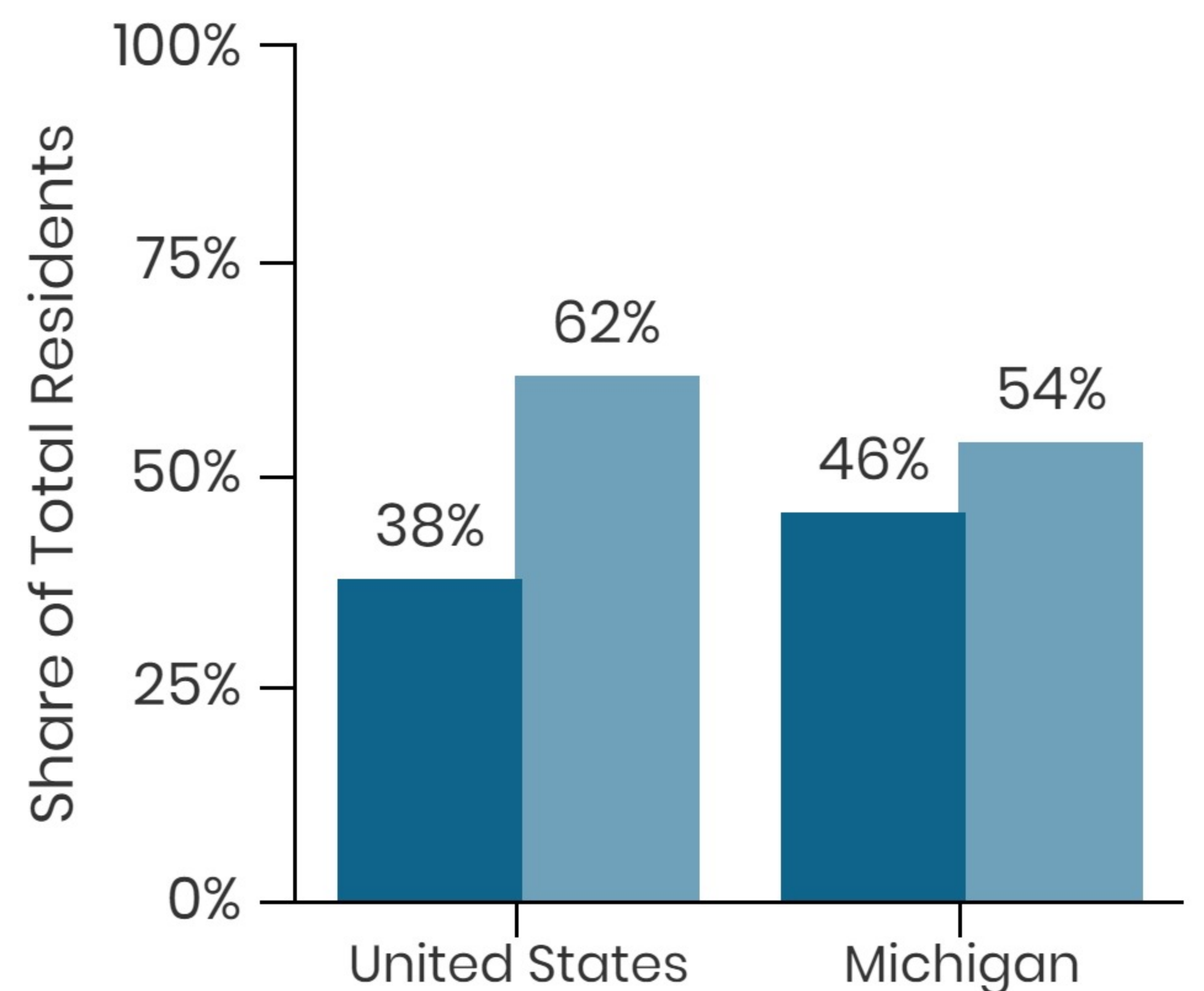
● Resid. Care ● Nursing Homes

Residential Care v. Nursing Homes
Share of Total Beds | 2014



● Resid. Care ● Nursing Homes

Residential Care v. Nursing Homes
Share of Total Residents | 2014



● Resid. Care ● Nursing Homes

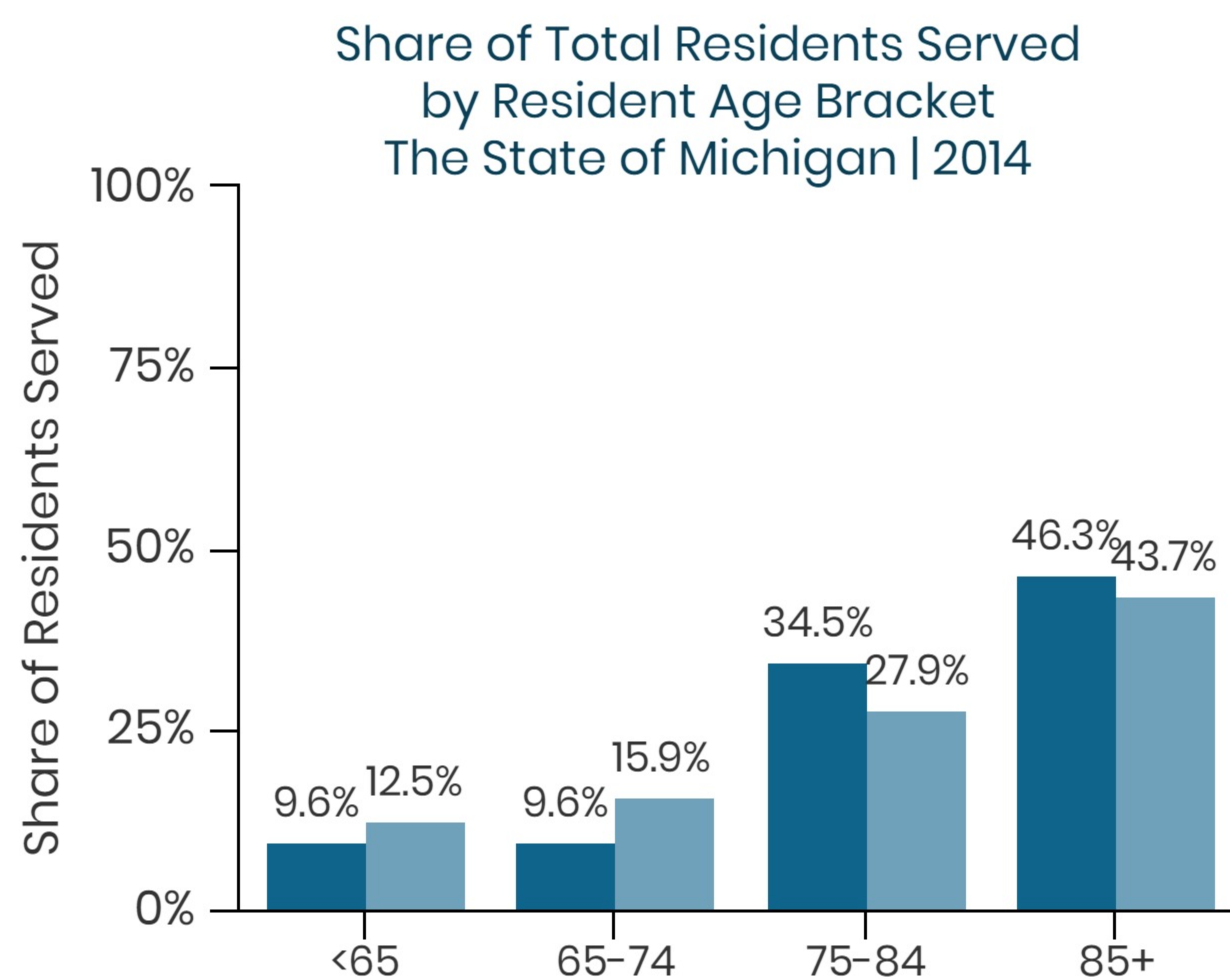
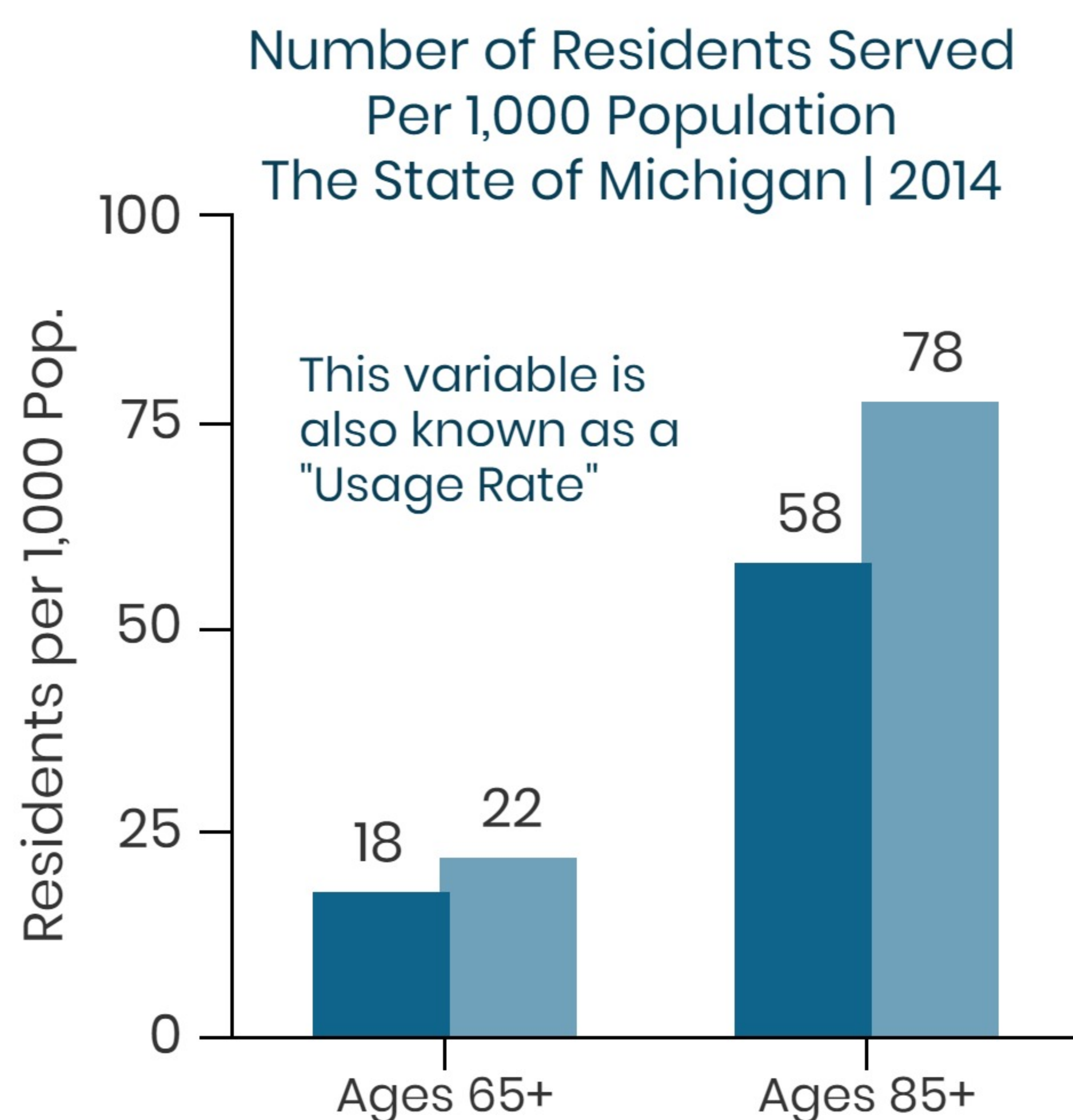


LandUseUSA
UrbanStrategies

Underlying data by the U.S. Dept. of Health & Human Services, National Center for Health Statistics, 2016. Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018. All terminology is consistent with national and statewide data reporting standards, and might not perfectly match local nomenclature.

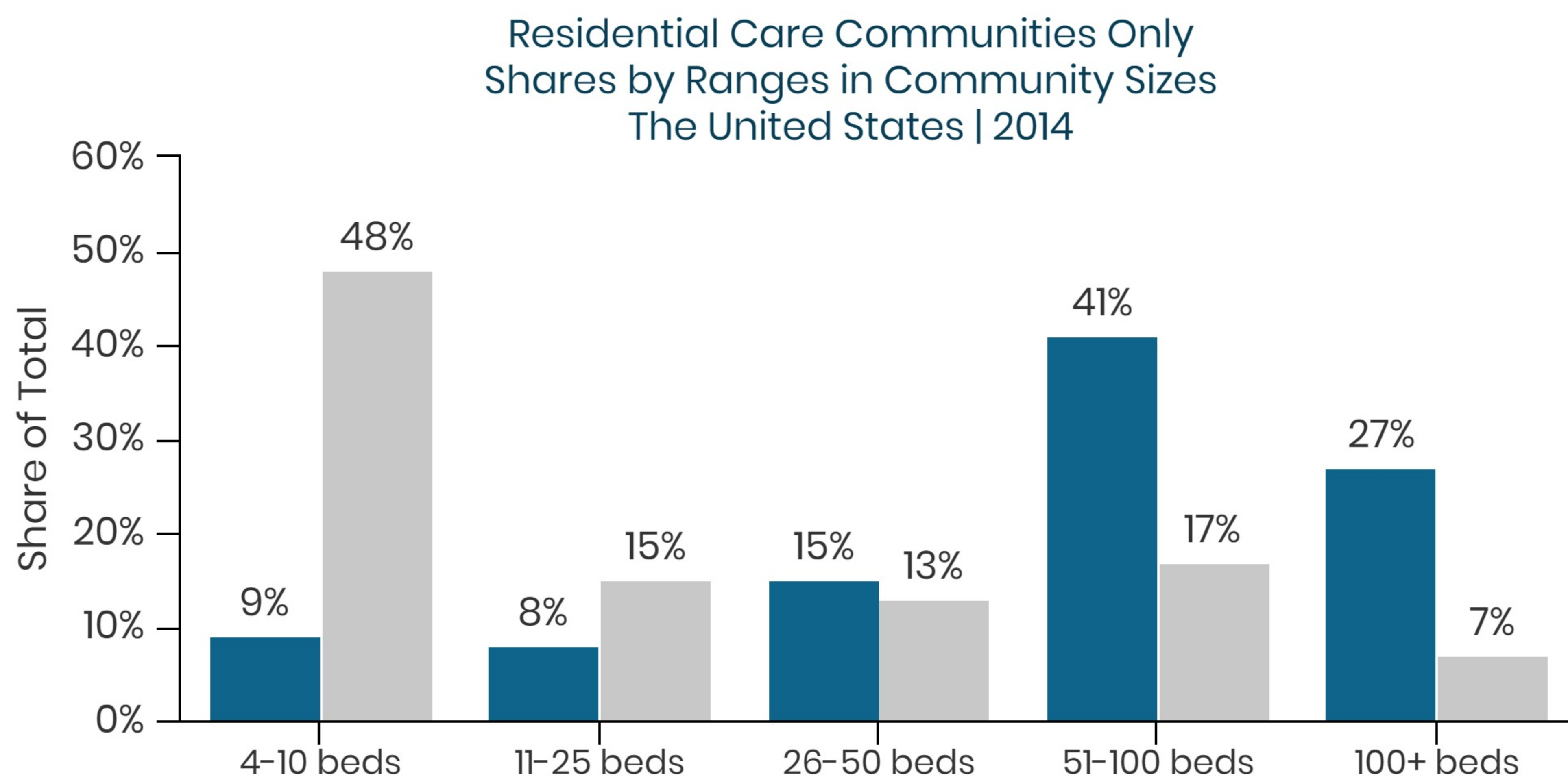
of Beds, Usage Rates, & Resident Ages

National and Michigan averages among Residential Care Communities.



● Resid. Care ● Nursing Homes

● Residential Care ● Nursing Homes



● Share of Residents ● Share of Communities

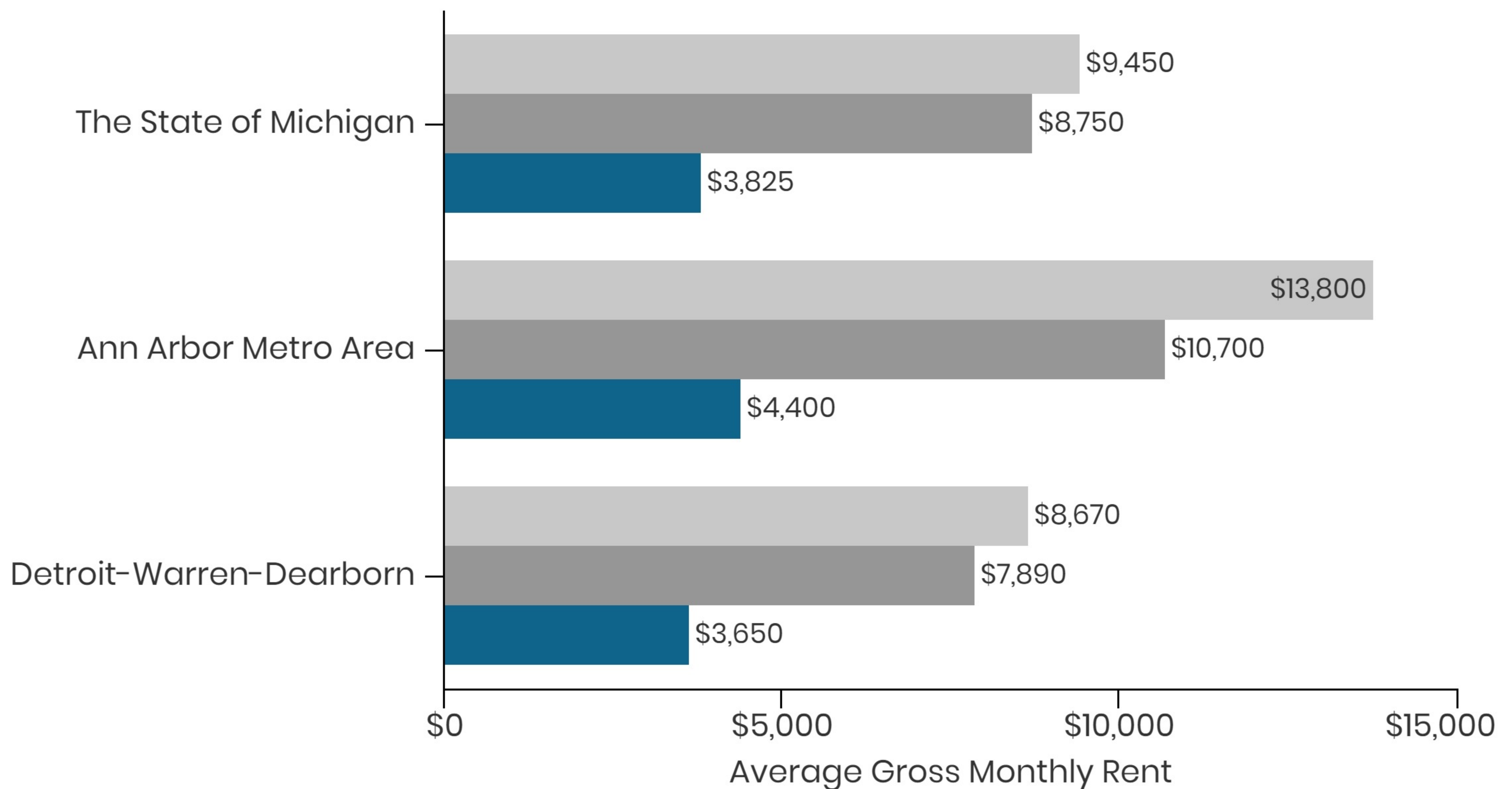


Underlying data by the U.S. Dept. of Health & Human Services, National Center for Health Statistics, 2016. Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018. All terminology is consistent with national and statewide data reporting standards, and might not perfectly match local nomenclature.

Gross Rents | Continuing Care Facilities

Gross monthly rents at Residential Care Communities and Nursing Homes in 2016.

Average Gross Monthly Rents
Residential Care and Nursing Homes
Two Metros v. Michigan | Year 2016



● Residential Care ● Nursing - Shared Room ● Nursing - Private Room

Continuing Care Retirement Facilities

1. Residential Care Communities

Independent Living
Assisted Living
may include some Dementia Care

Excludes:

- Hospice Centers
- Adult Day Care Centers
- Home Care Service Providers

Continuing Care Retirement Facilities

2. Nursing Homes

Rehabilitation Services
Physical, Occupational Therapy
specialized Alzheimer Care
similar Institutions

Gross rents include utilities; all meals; nursing care and assistance with daily needs; occupational therapy; and activities geared towards socialization, wellness and fitness, memory care, and continued learning.

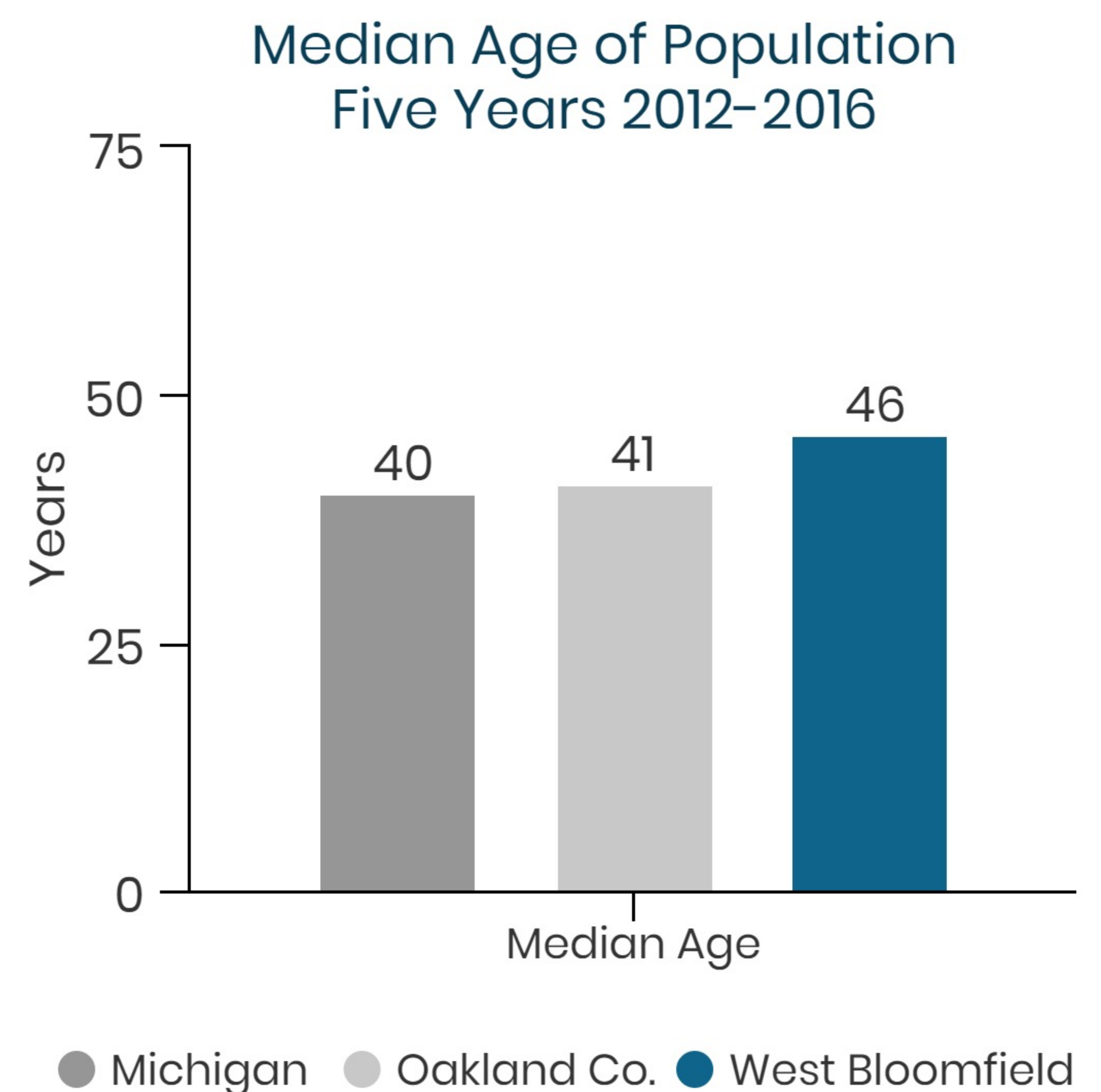
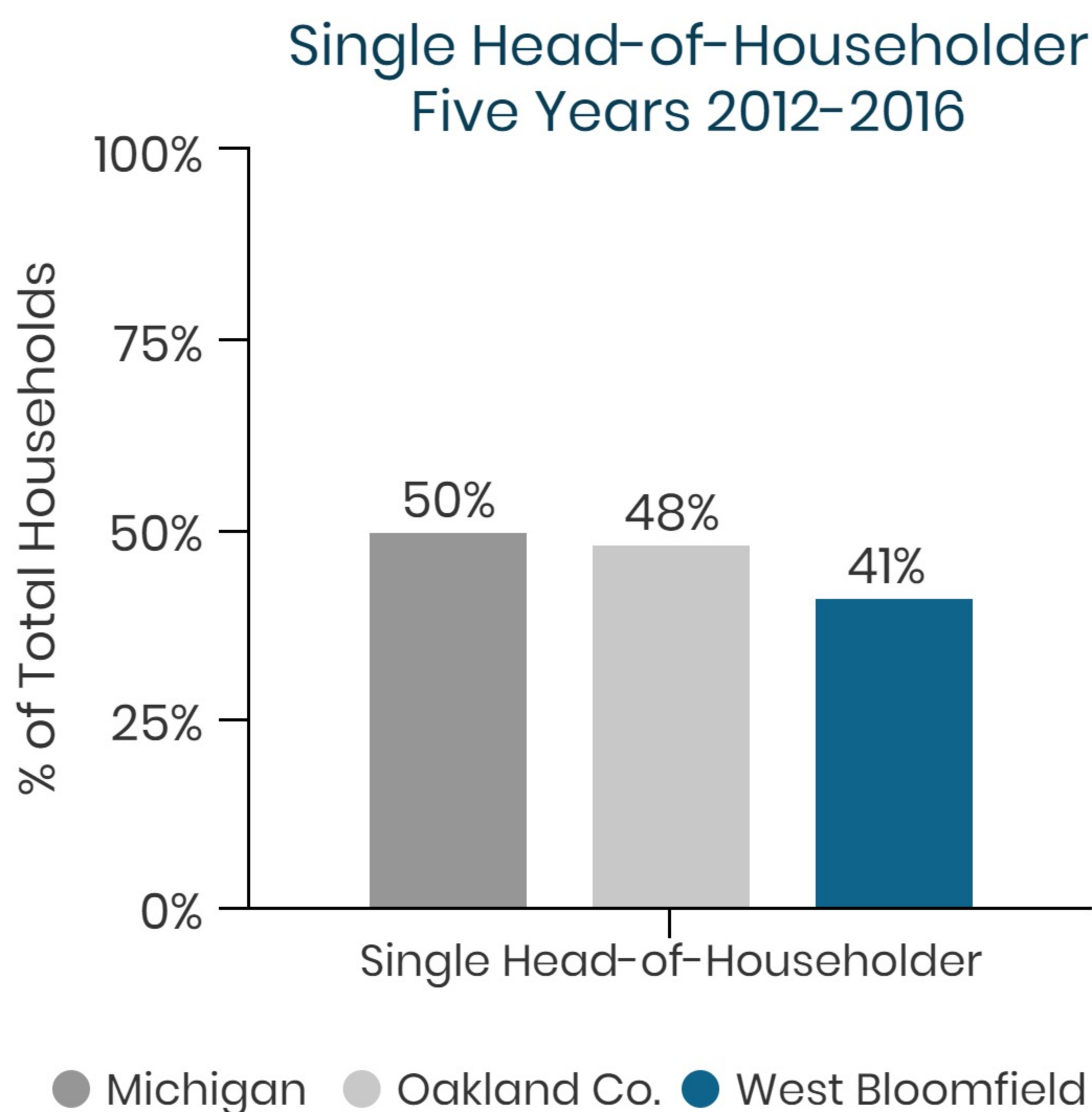
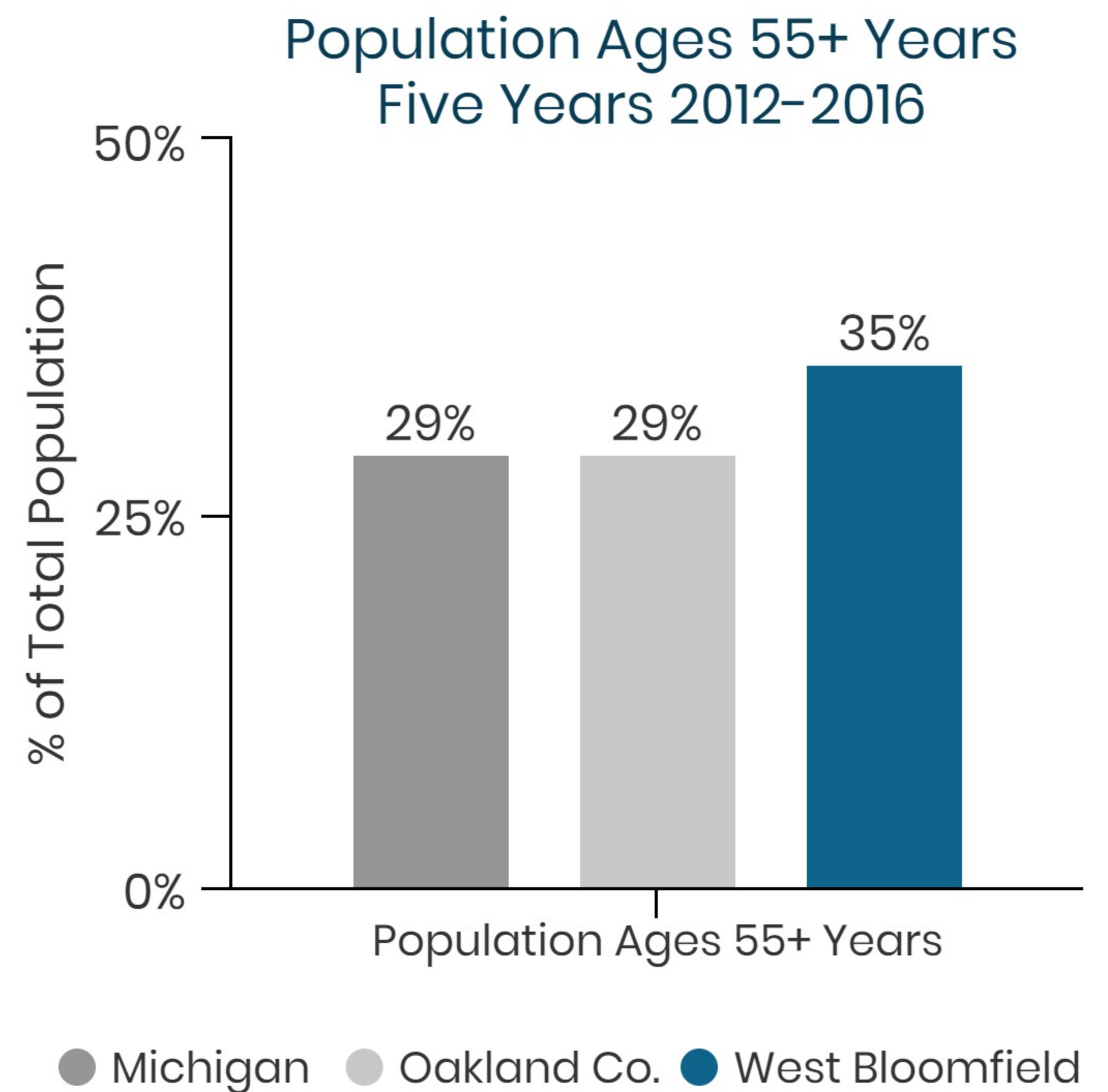
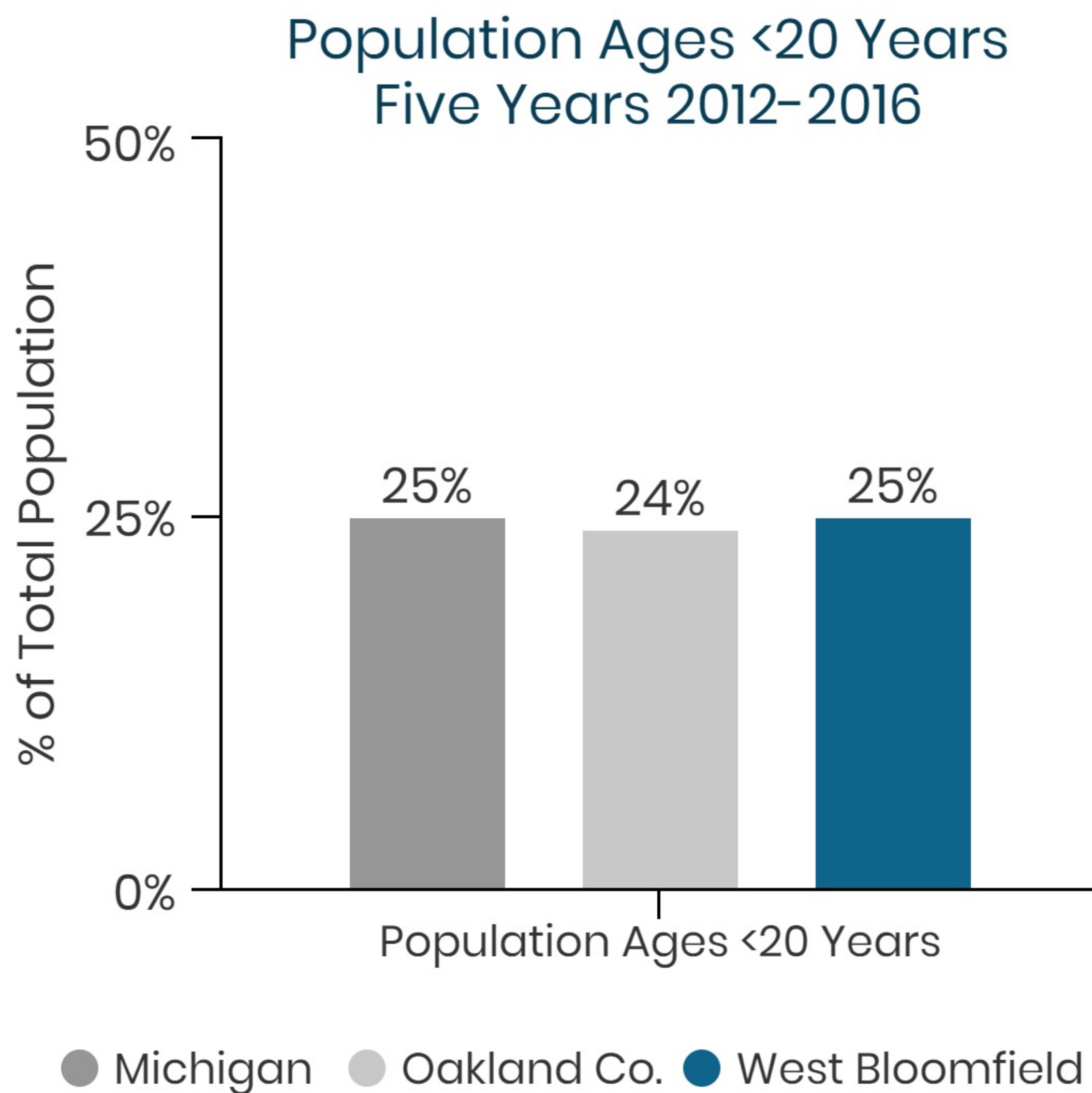


LandUseUSA
UrbanStrategies

Underlying data is based on a survey conducted by CareScout (R) in 2016, with results reported in 2017. Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018. All terminology is consistent with national and statewide data reporting standards, and might not perfectly match local nomenclature.

Population & Age | West Bloomfield

A comparison of the age profiles among the established resident population.



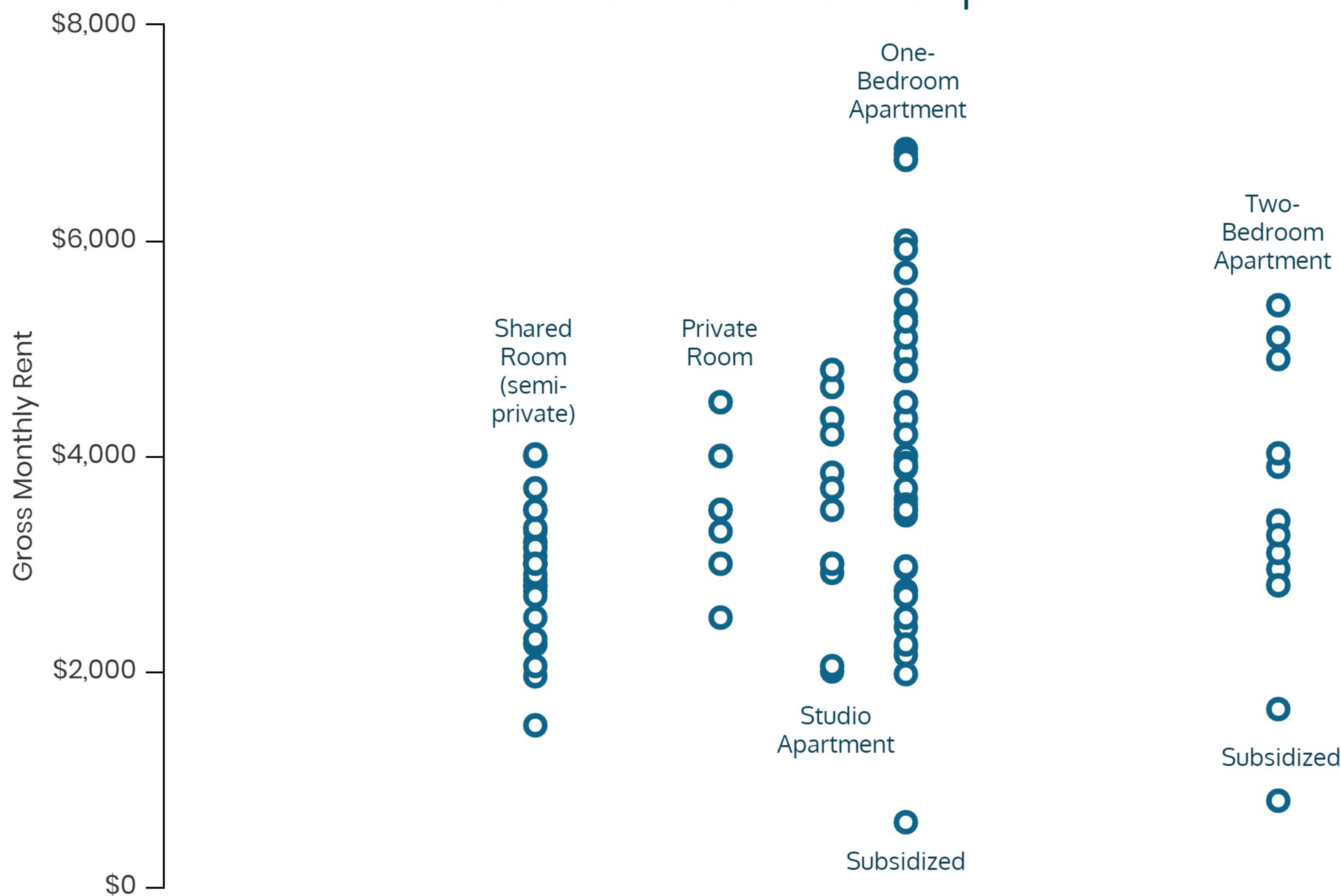
LandUseUSA
UrbanStrategies

Underlying data by the Decennial Census and the American Community Survey (ACS) 2012-2016.
Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018.

Residential Care | West Bloomfield

Gross rents for rooms (assisted living) and apartments (usually independent living)

Gross Monthly Rent v. Accommodation Assisted and Independent Living Choices West Bloomfield Township



Observations: As expected, the contract rent among for-lease units is directly related to the size of accommodations, including private and shared ("semi-private") rooms; and one and two-bedroom apartments.

The samples shown here do not include Nursing Homes, which are specialized institutions that have even higher gross rents to cover the costs of individualized nursing care. A comparison of monthly gross rents between Residential Care Communities and Nursing Homes are provided in a separate infographic.

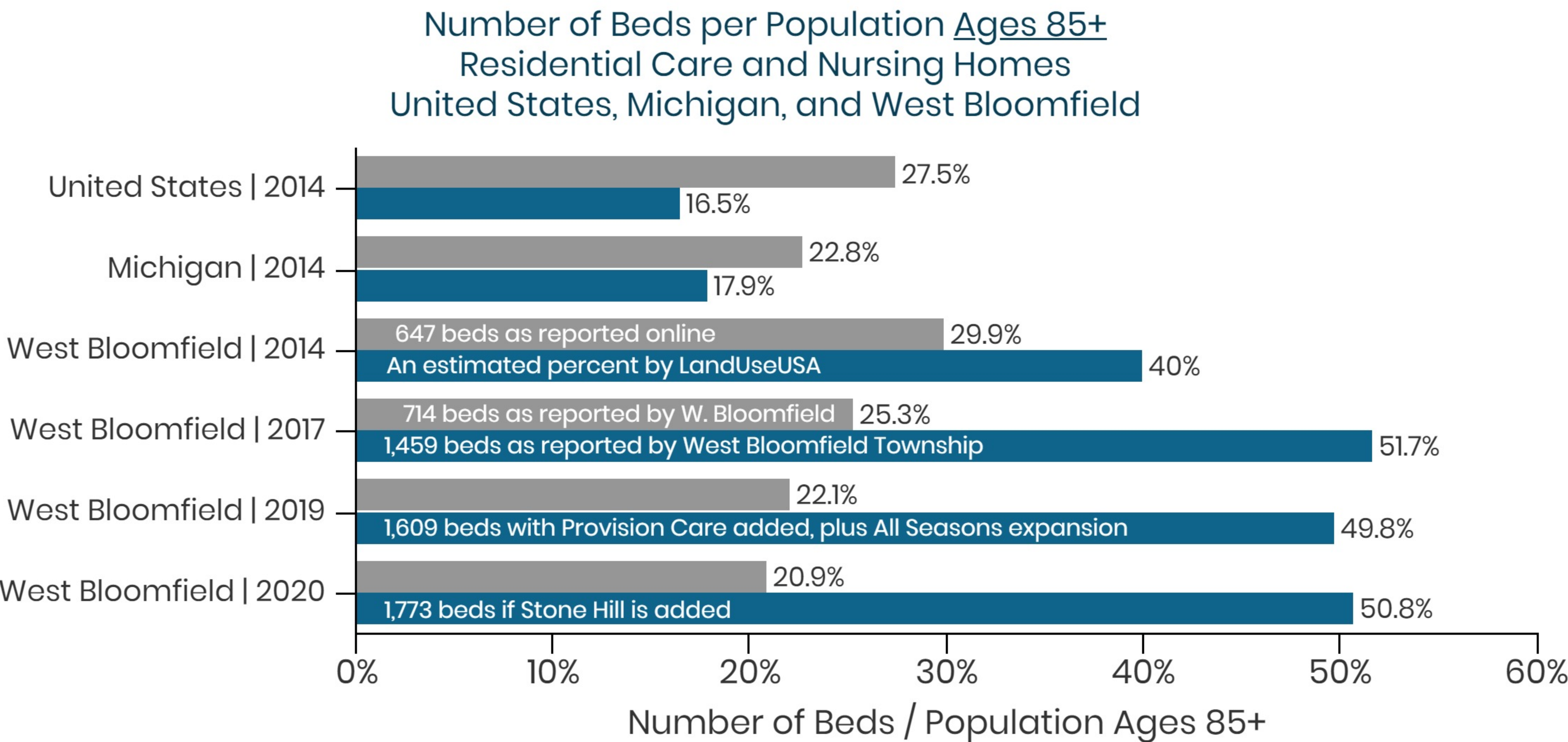
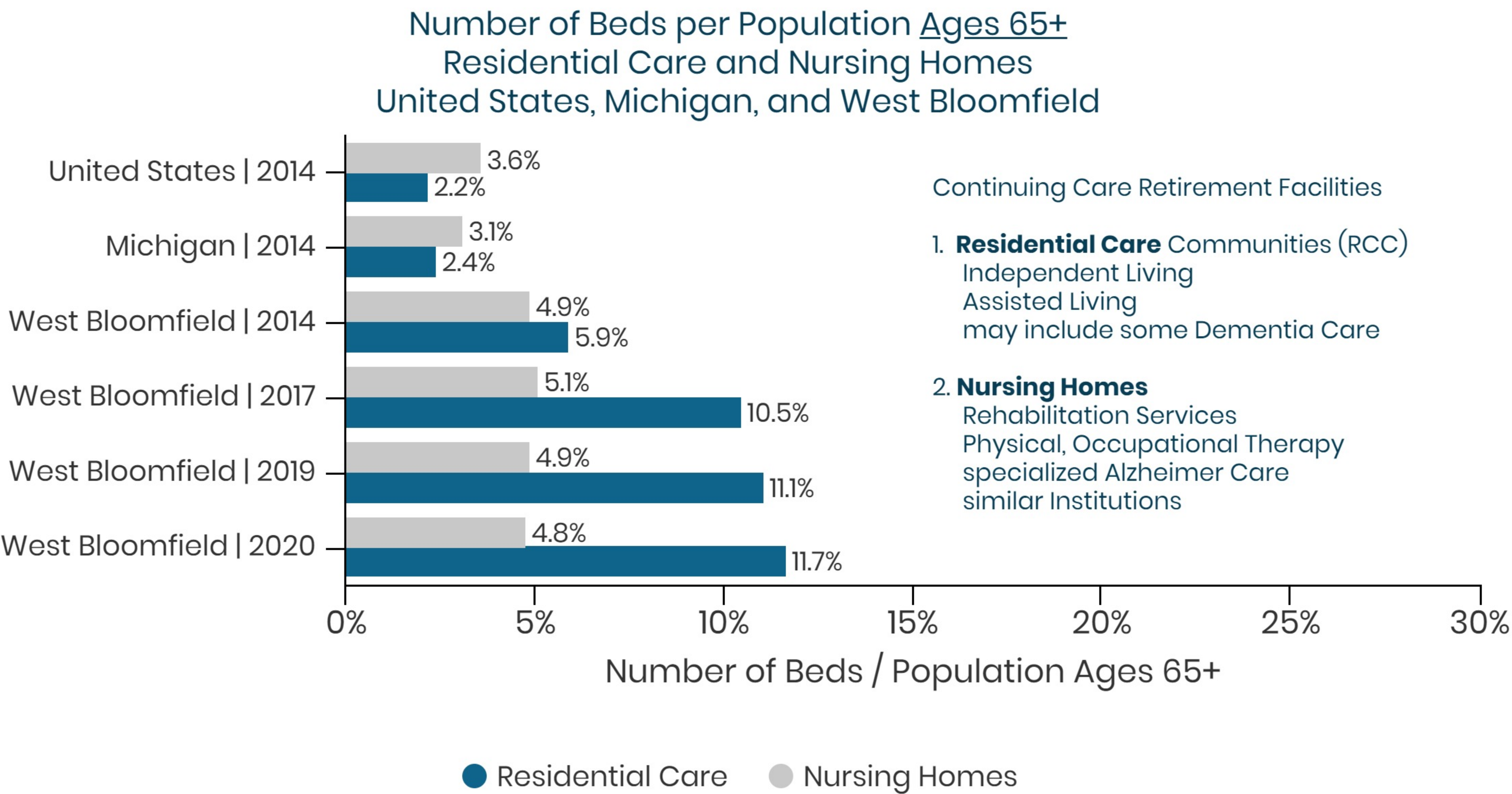
Note: Gross rent for assisted living facilities typically includes most utilities, all meals, and moderate on-call nursing assistance with some daily needs.



Underlying data is based on field research, phone surveys, and assessors records.
Analysis and exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018.

Saturation of Continuing Care | W. Bloomfield

Number of beds compared to forecast population ages 65+ and 85+ years.

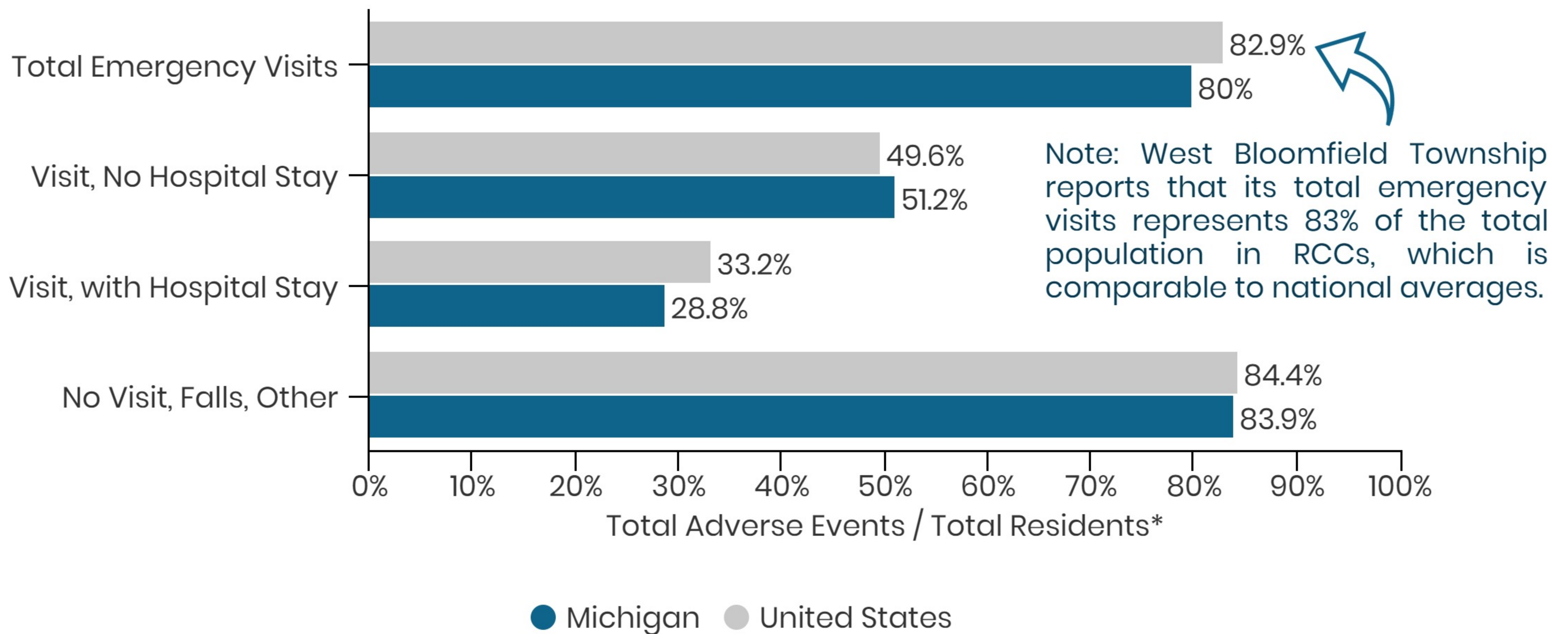


Underlying 2014 data was extracted from various studies of long-term care providers; as reported by the Center for Disease Control (CDC) and National Center for Health Statistics (NCHS). Nursing home data for West Bloomfield was provided by www.NursingHomeRating.org. Analysis and exhibit prepared by LandUseUSA, LLC © on behalf of West Bloomfield Township, 2018. All figures exclude Magnolia by the Lakes, which is technically located in Keego Harbor. All terminology is consistent with national and statewide data reporting standards, and might not perfectly match local nomenclature.

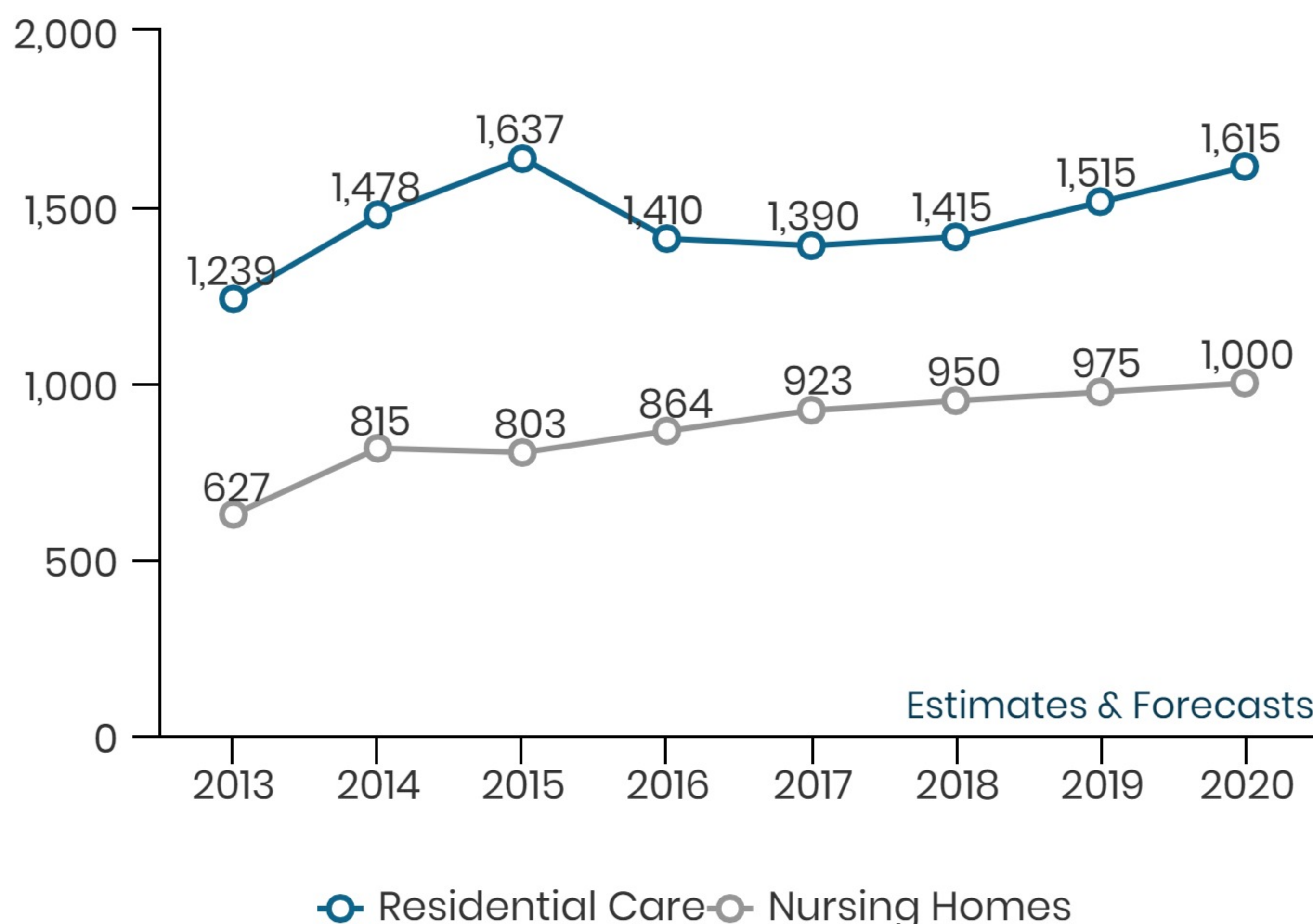
Emergency Visits | West Bloomfield

Emergency responses to adverse events at residential care communities.

Emergency Visits for Adverse Events
Residential Care Communities
As a Share of Total Annual Residents
United States and Michigan | Year 2014



Actual & Forecast Emergency Visits
West Bloomfield Township



Left: Forecasts of emergency visits to Residential Care (Independent and Assisted Living) reflect increases following anticipated and prospective addition of beds and units:

1. Expansion at All Seasons (+30 units)
2. Opening of Provision (+120 units Nov. '18)
3. Proposed Stone Hill (+126 units 2020)

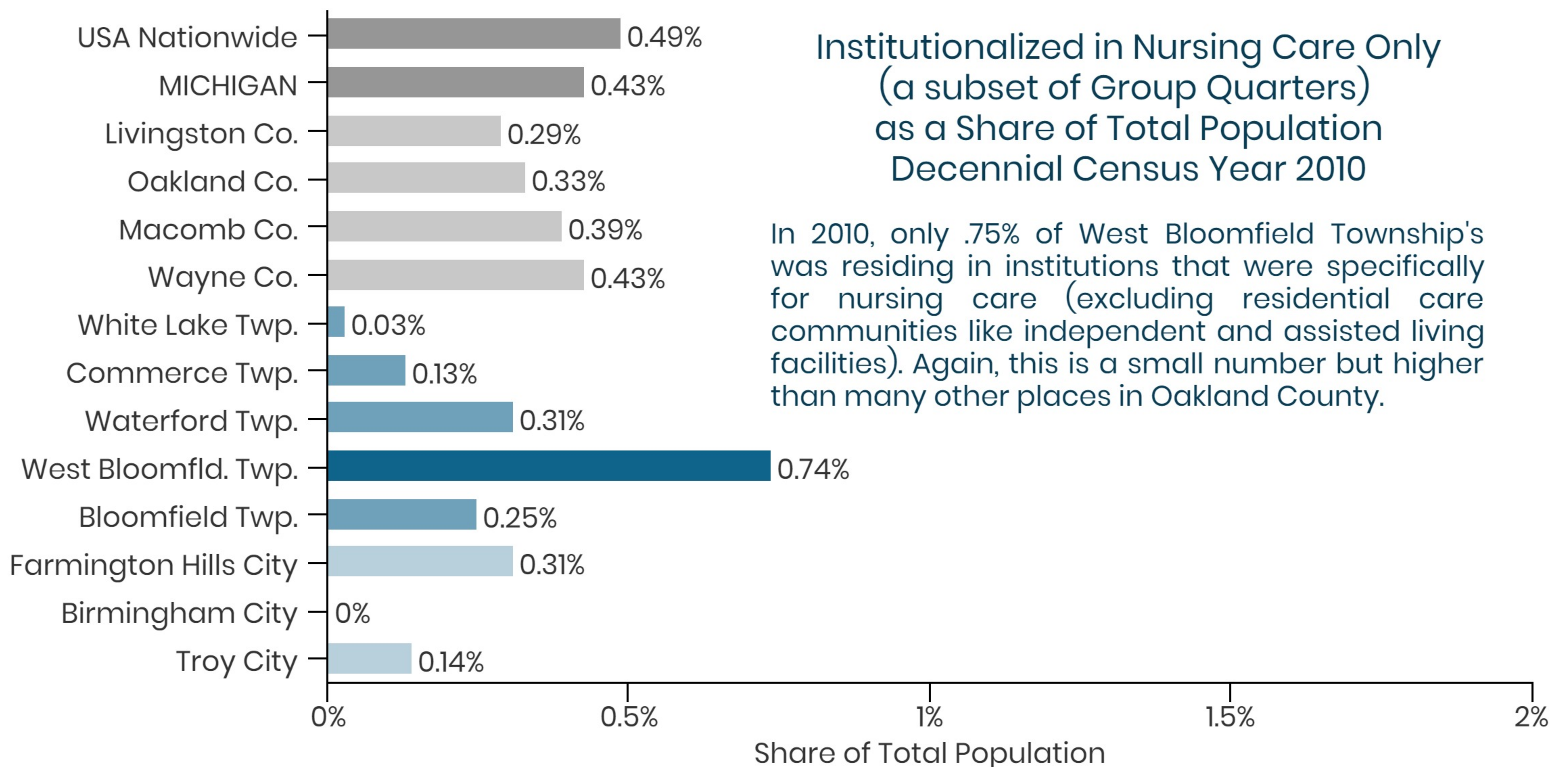
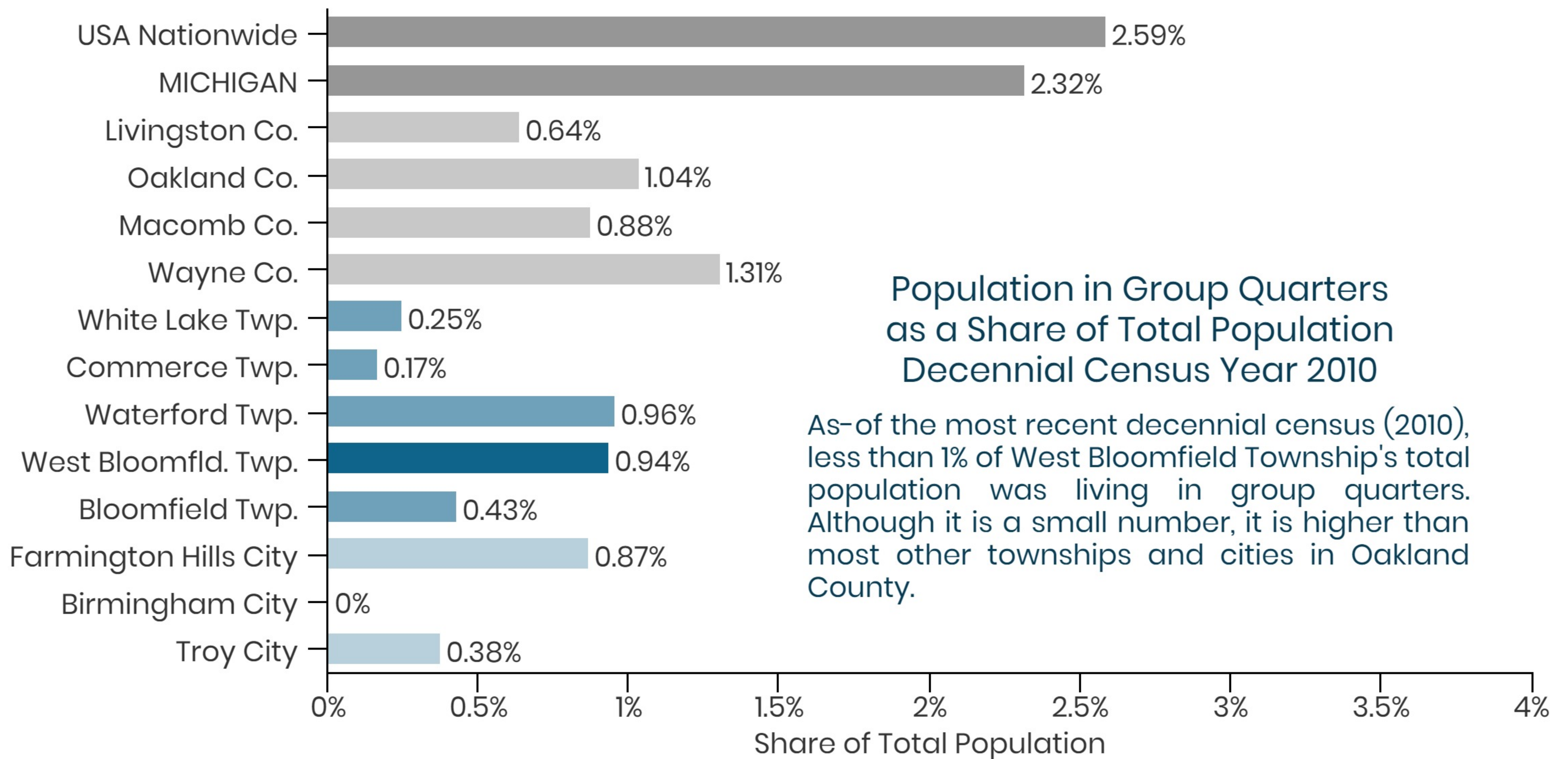


LandUseUSA
UrbanStrategies

Underlying data for the United States and Michigan provided by the U.S. Dept. of Health & Human Services, National Center for Health Statistics, 2016. Underlying data for West Bloomfield provided by the jurisdiction. Analysis, forecasts, and exhibit prepared by LandUseUSA ©. All terminology is consistent with national and statewide data reporting standards, and might not perfectly match local nomenclature.

Group Quarters | West Bloomfield

Share of population living in nursing care institutions and group quarters in 2010.



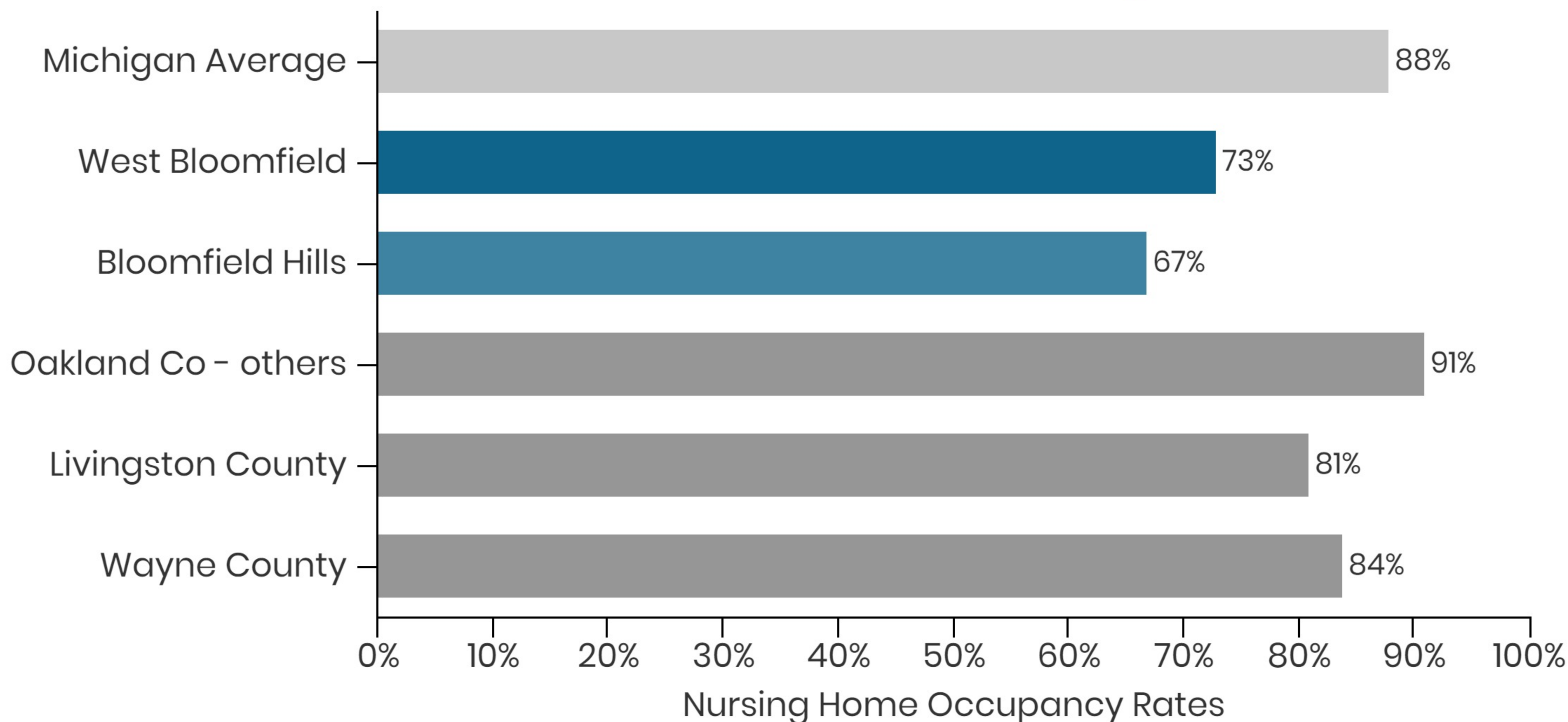
LandUseUSA
UrbanStrategies

Data by the Decennial Census for the year 2010. American Community Survey data is not available. Analysis and exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018. Group Quarters includes institutional housing: a) correctional facilities, b) juvenile facilities, and c) nursing care; plus non-institutional housing: a) university housing, b) military quarters, and c) other group quarters.

Nursing Homes Only | West Bloomfield

Occupancy rates among Nursing Homes (excludes Residential Care Communities).

Comparison of Nursing Home Occupancy Rates
Selected Counties and Communities in Michigan



Includes **Nursing Homes** only
Rehabilitation Services
Physical, Occupational Therapy
specialized Alzheimer Care
similar Institutions

Excludes:

- Independent & Assisted Living
- Hospice Centers
- Adult Day Care Centers
- Home Care Service Providers

Observation: Low occupancy rates can be one indicator of possible over-supply relative to demand. It can also reflect an upsurge in building activity followed by the introduction of new rooms and choices that will soon be occupied. New tenants may include transient residents who migrate from other jurisdictions to select from the newest choices.

West Bloomfield Township, Michigan
Inventory of Largest Nursing Homes
(all others have 6 beds or less, each)

1. West Bloomfield Nursing Ctr
6445 W Maple Rd (172 beds)
2. Danto Health Care Center
6800 W Maple Rd (147 beds)
3. Heartland of West Bloomfield
6950 Farmington Rd (140 beds)
4. Notting Hill of West Bloomfield
6535 Drake Road (120 beds)
5. Village at Green Lake Estates
6470 Alden Drive (85 beds)
6. West Bloomfield Orchard Villa
7277 Richardson Rd (50 beds)

Inventory does not include Magnolia by the Lakes. Although technically located in Keego Harbor, it is serviced by West Bloomfield's emergency response team.



LandUseUSA
UrbanStrategies

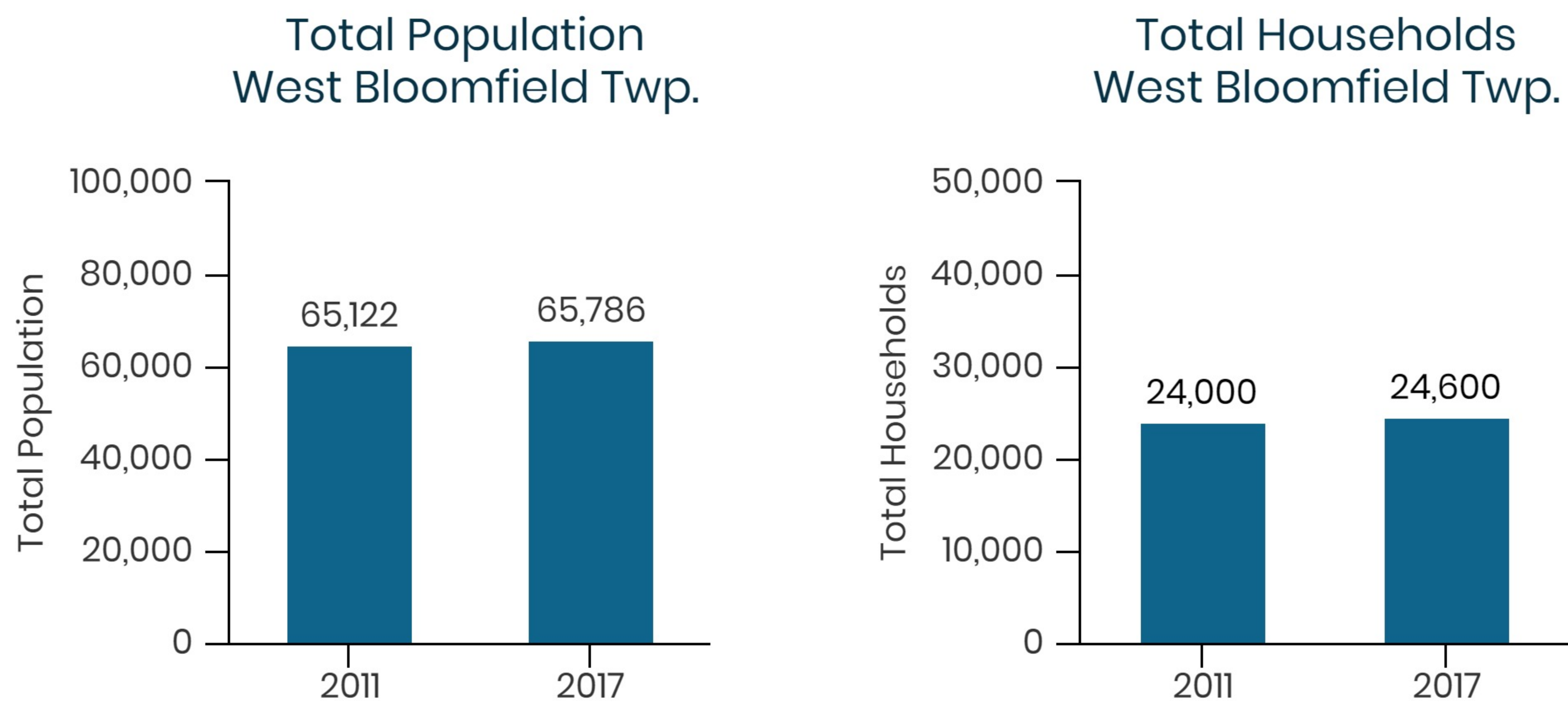
Underlying data by the U.S. Dept. of Health & Human Services, National Center for Health Statistics, 2016.
Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018. All terminology is consistent with national and statewide data reporting standards, and might not perfectly match local nomenclature.

Section G

Market Supply and Demand

Households & Population | West Bloomfield

A comparison of total households and population over time.



Household Size - Households in West Bloomfield Township average 2.7 persons each, with small declines variation over time and consistent with statewide averages. Household sizes are gradually declining across the nation, for a number of inter-related reasons. Young adults are waiting longer to get married and start families; families are tending to have fewer children; divorce rates have been climbing; and empty nesters are living longer.

West Bloomfield Township has experienced moderate growth in recent years, or +664 households and +600 residents since 2011. The vast majority of these NEW residents moving into West Bloomfield Township are singles, which may be attributed to a number of factors. First, singles tend to have significantly higher movership rates and are more likely to be transient rather than settled. In addition, singles are also growing as share of all households across the state and nation. Finally, when seeking independent and assisted living communities, seniors will move between jurisdictions if necessary.



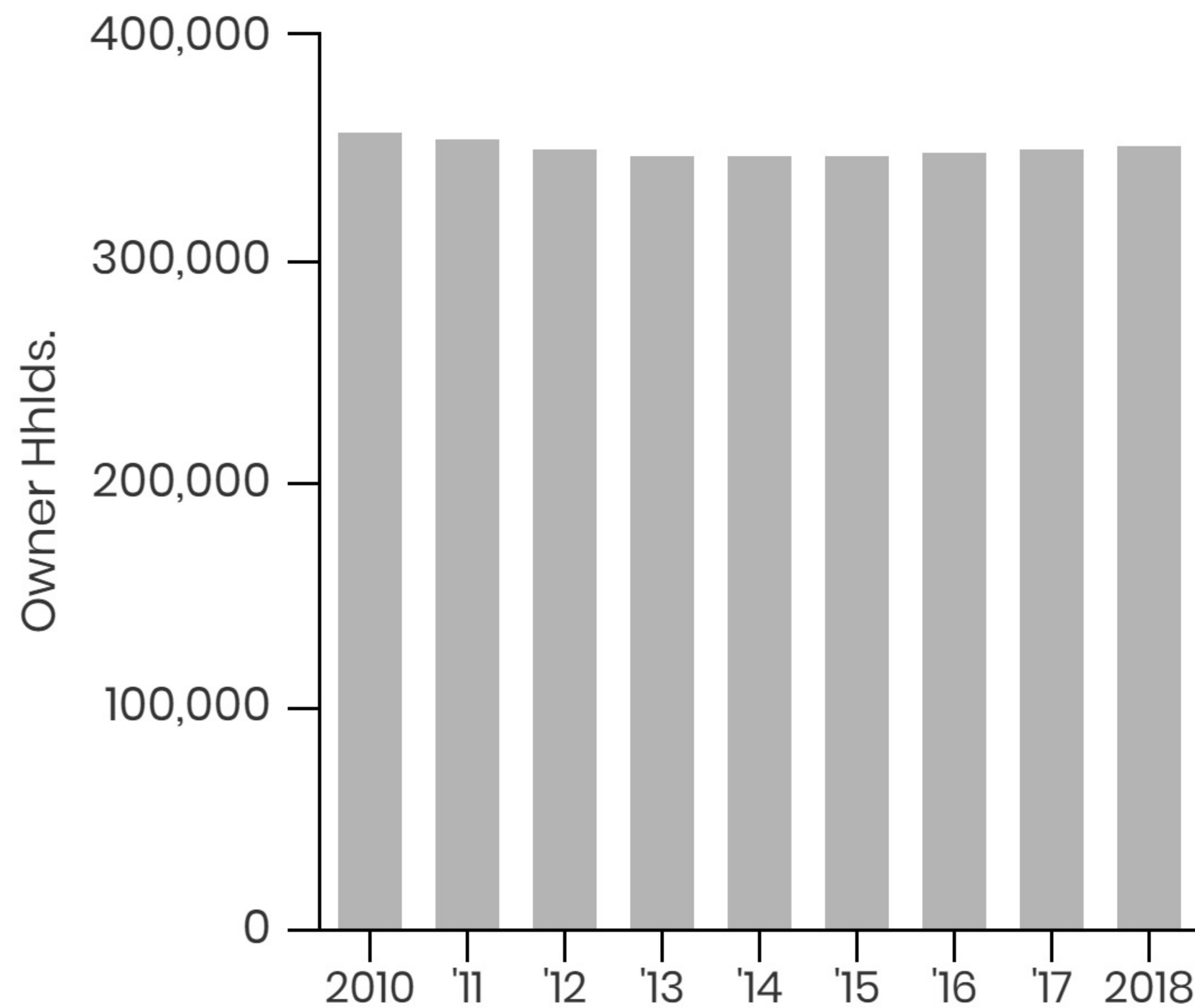
LandUseUSA
UrbanStrategies

Underlying data by the Decennial Census and American Community Survey through 2016.
Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018.

Households by Tenure | West Bloomfield

A comparison of existing households by tenure over time.

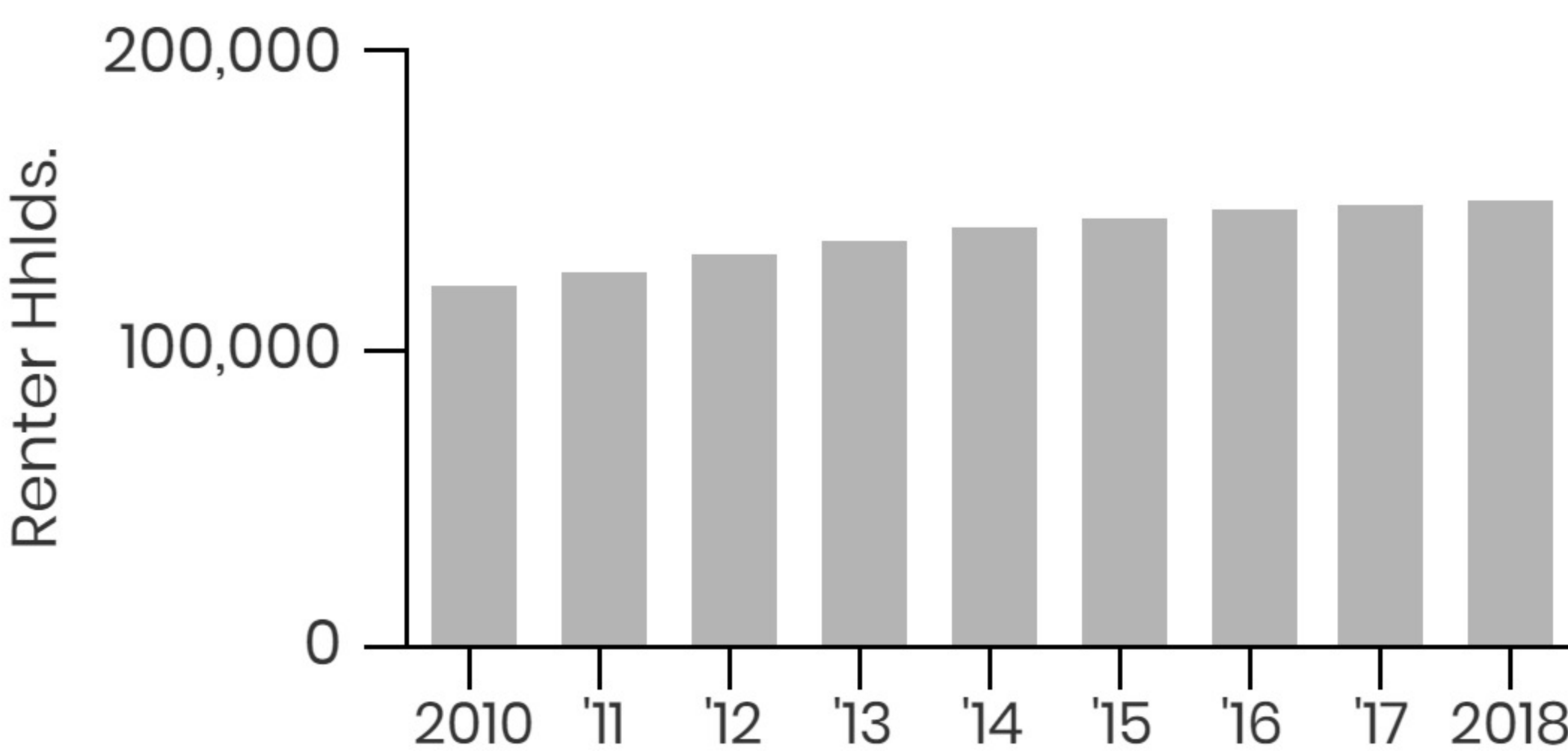
Owner Households
Oakland County



2017 Estimate = 351,500

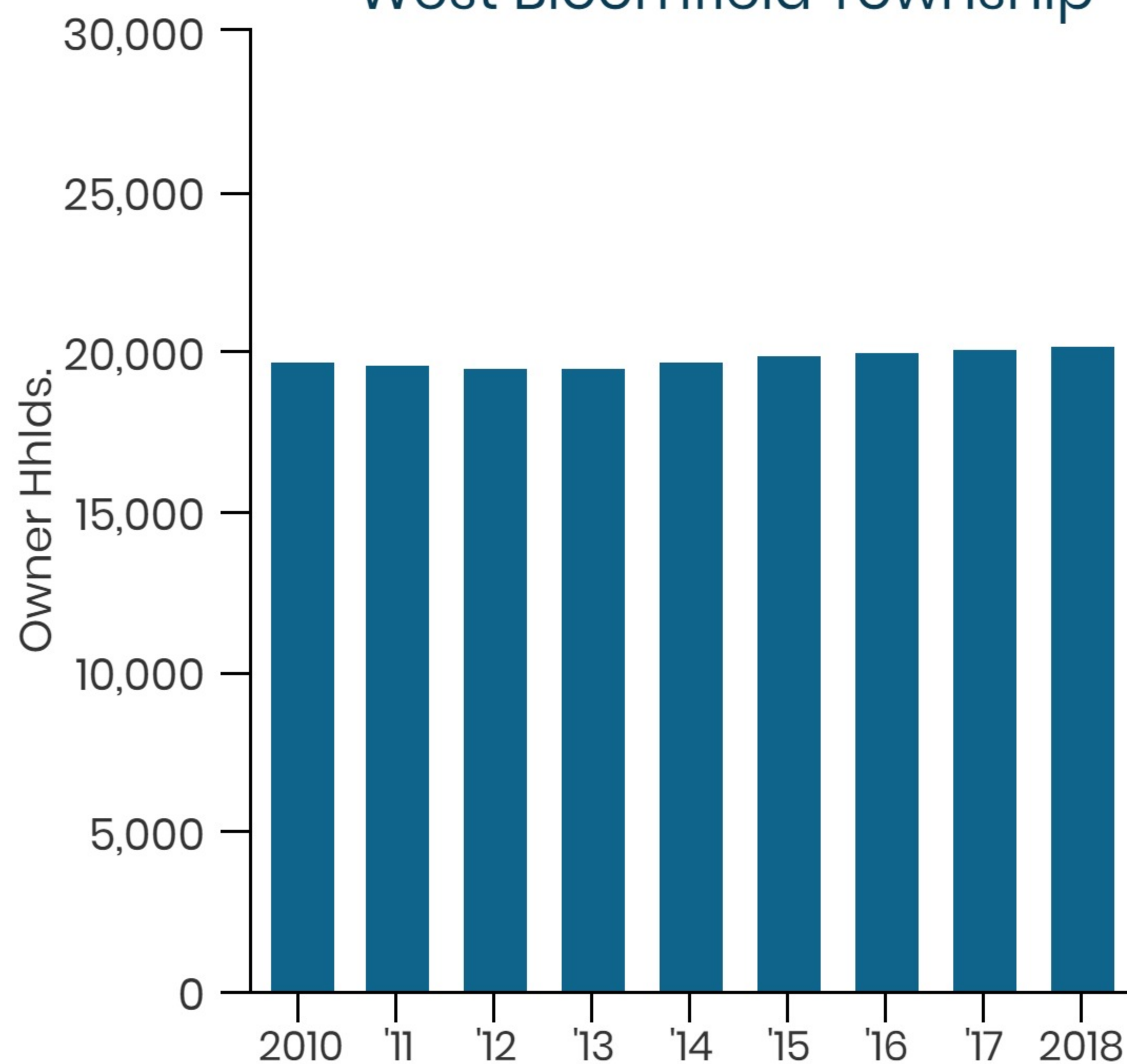
Renter Households
Oakland County

Less than half (43%) of Oakland County's households are renters, and the majority are home owners. However, renters are slowly gaining as a share of the total. Renters tend to be more transient and more inclined to seek attached formats in socially-connected places.



2018 Estimate = 151,700

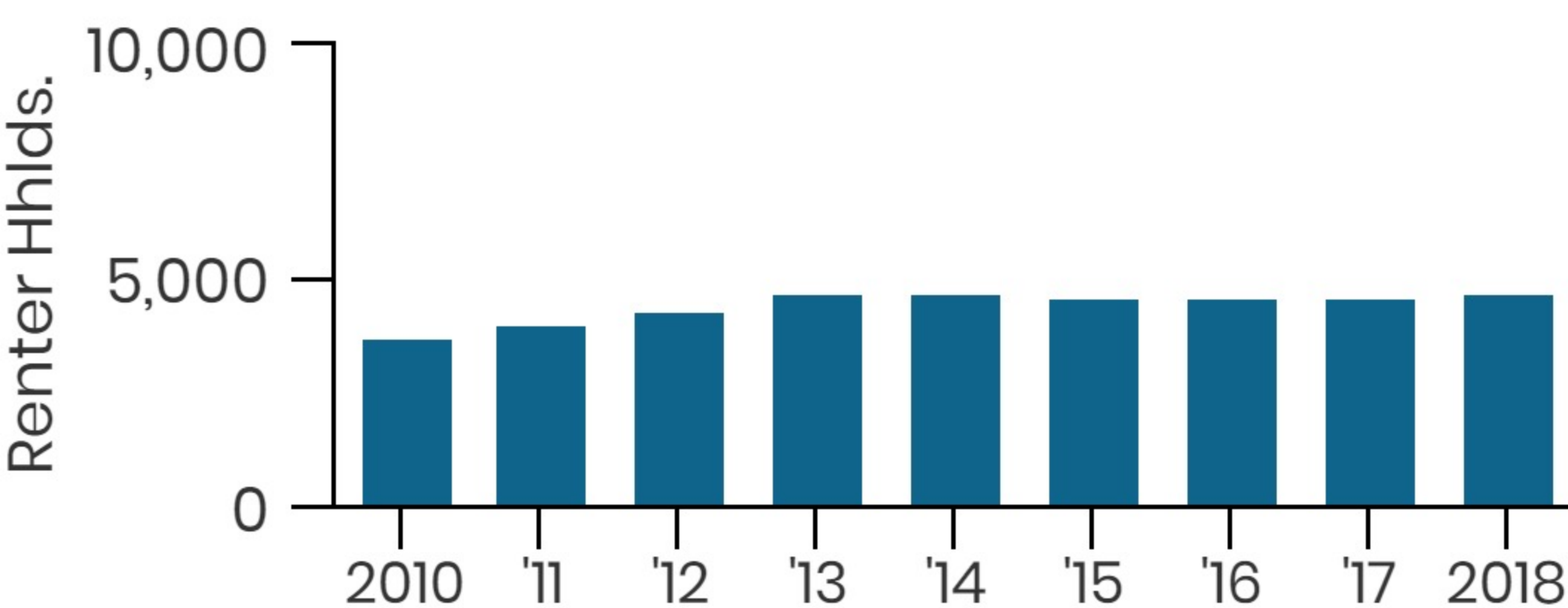
Owner-Occupied Households
West Bloomfield Township



2018 Estimate = 20,210

Renter-Occupied Households
West Bloomfield Township

Less than one-quarter (23%) of West Bloomfield's households are renters, and they are twice as prevalent in other parts of Oakland County. There is a need to provide more attached housing formats for singles of all ages. The targets include young workers seeking attainably-priced lofts and townhouses, plus empty-nesting snow birds seeking second homes near the lakes.



2018 Estimate = 4,640



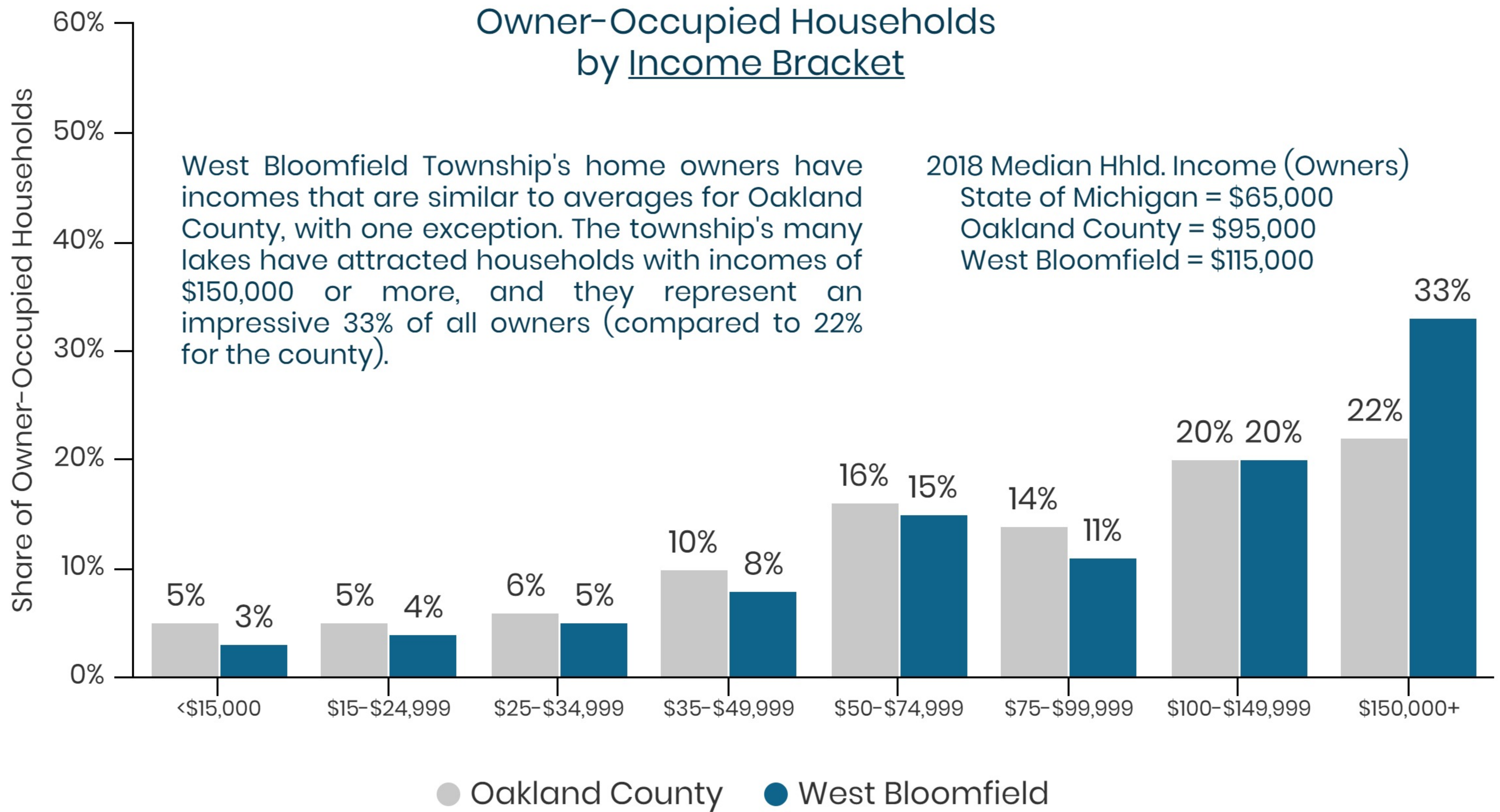
LandUseUSA
UrbanStrategies

Underlying data by the Decennial Census and American Community Survey through 2016.
Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018.

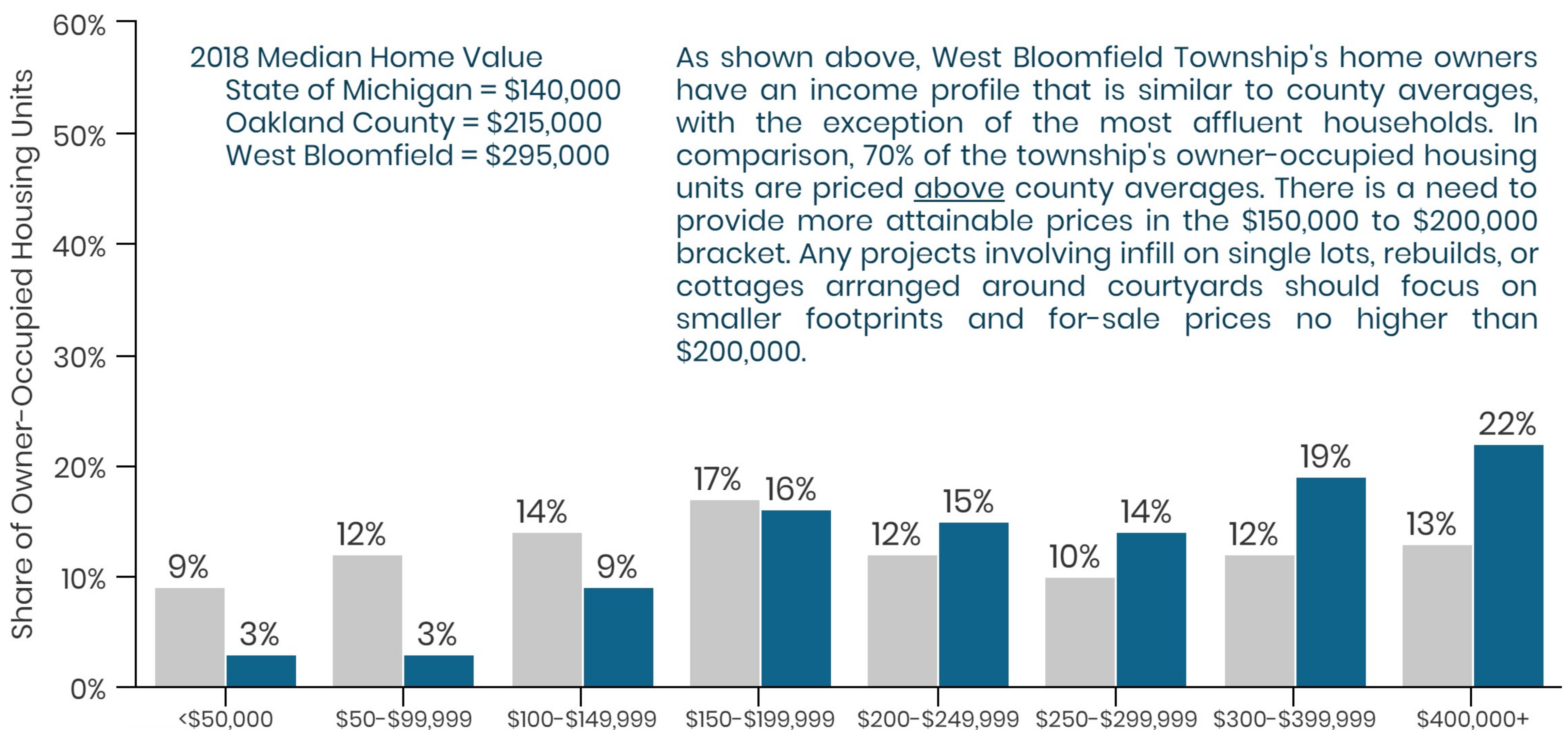
Owner Incomes & Values | West Bloomfield

A comparison of owner-occupied household incomes and home values.

Owner-Occupied Households by Income Bracket



Owner-Occupied Housing Units by Value Bracket

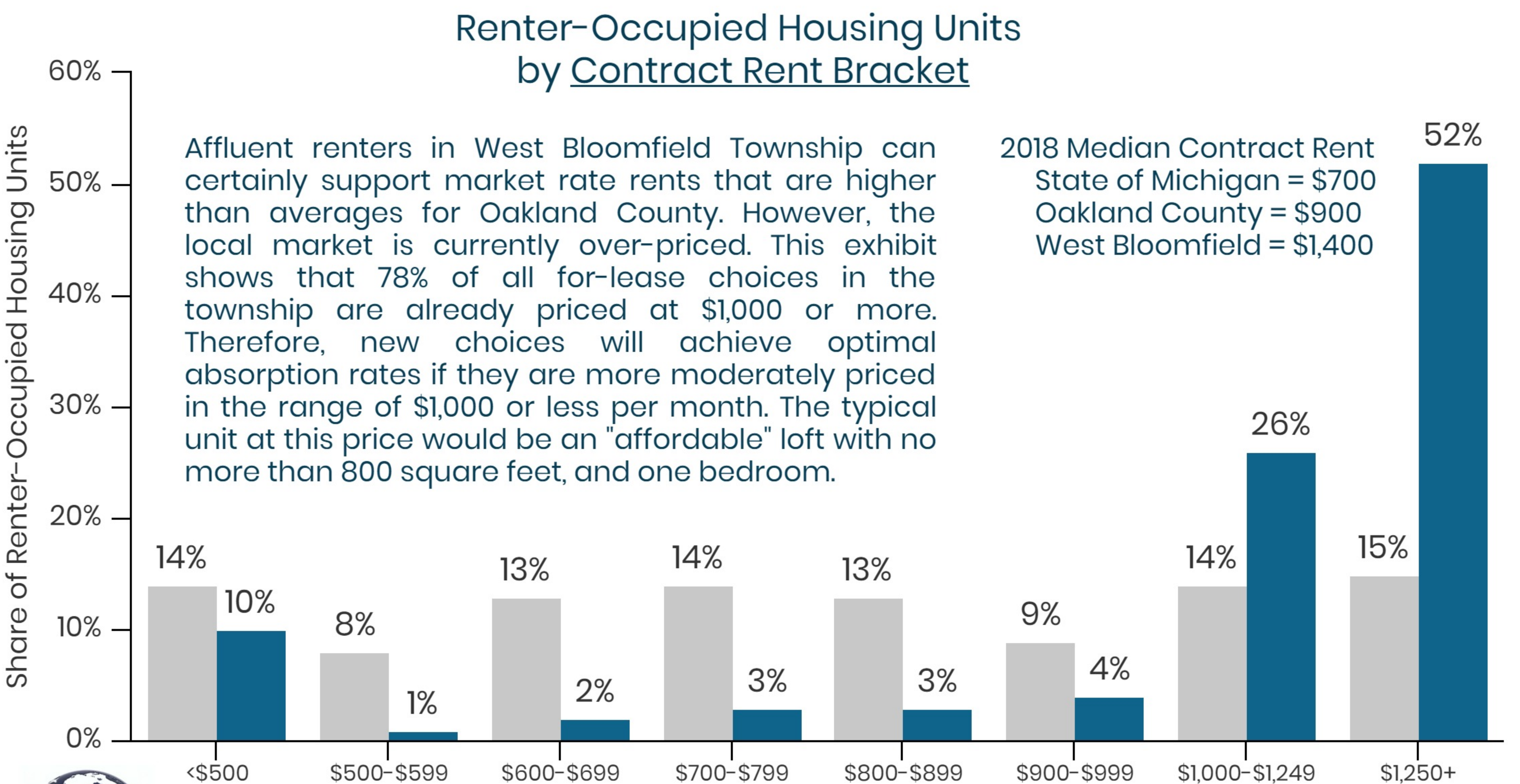
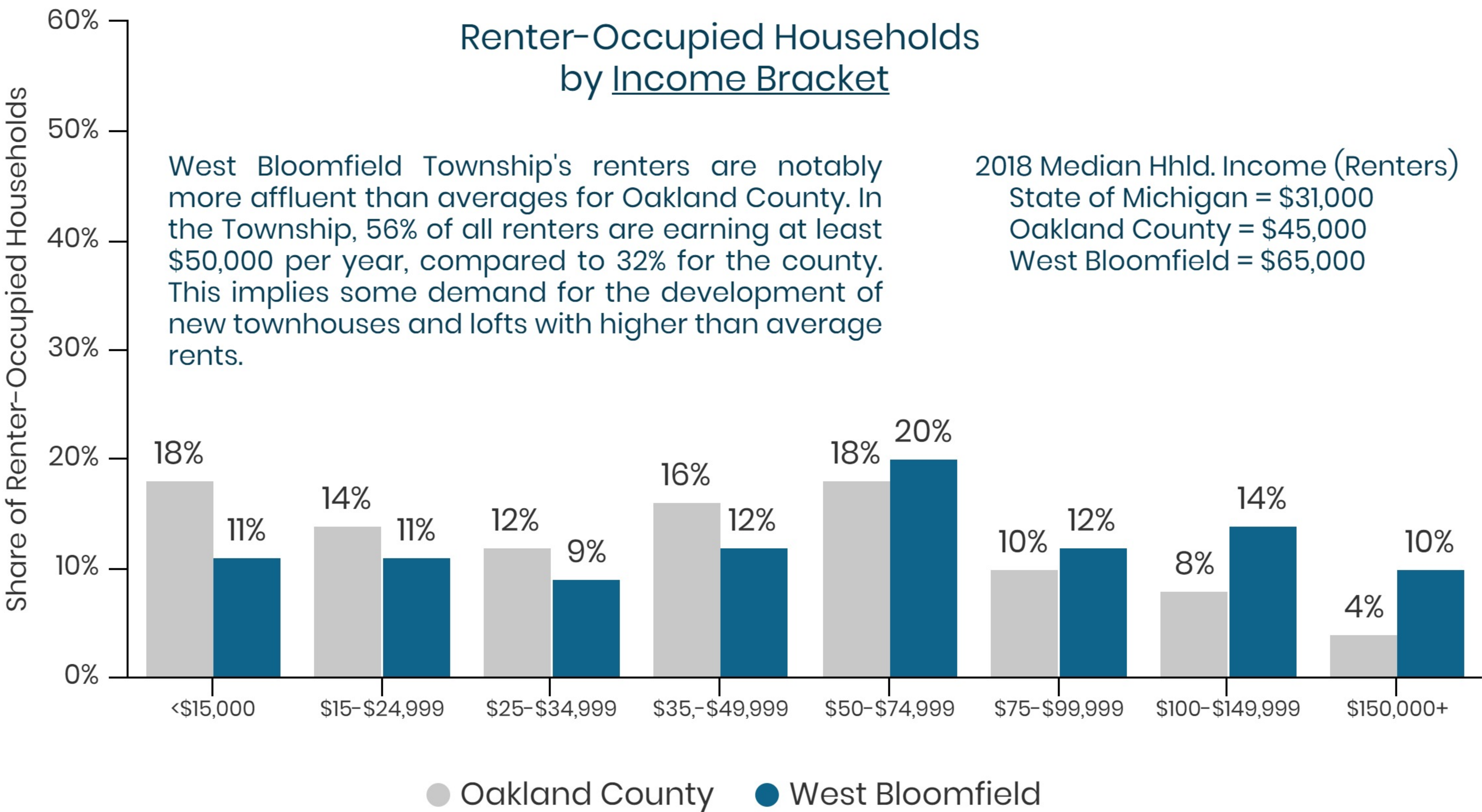


LandUseUSA
UrbanStrategies

Underlying data by the Decennial Census and American Community Survey through 2016.
Analysis & exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township; 2018.

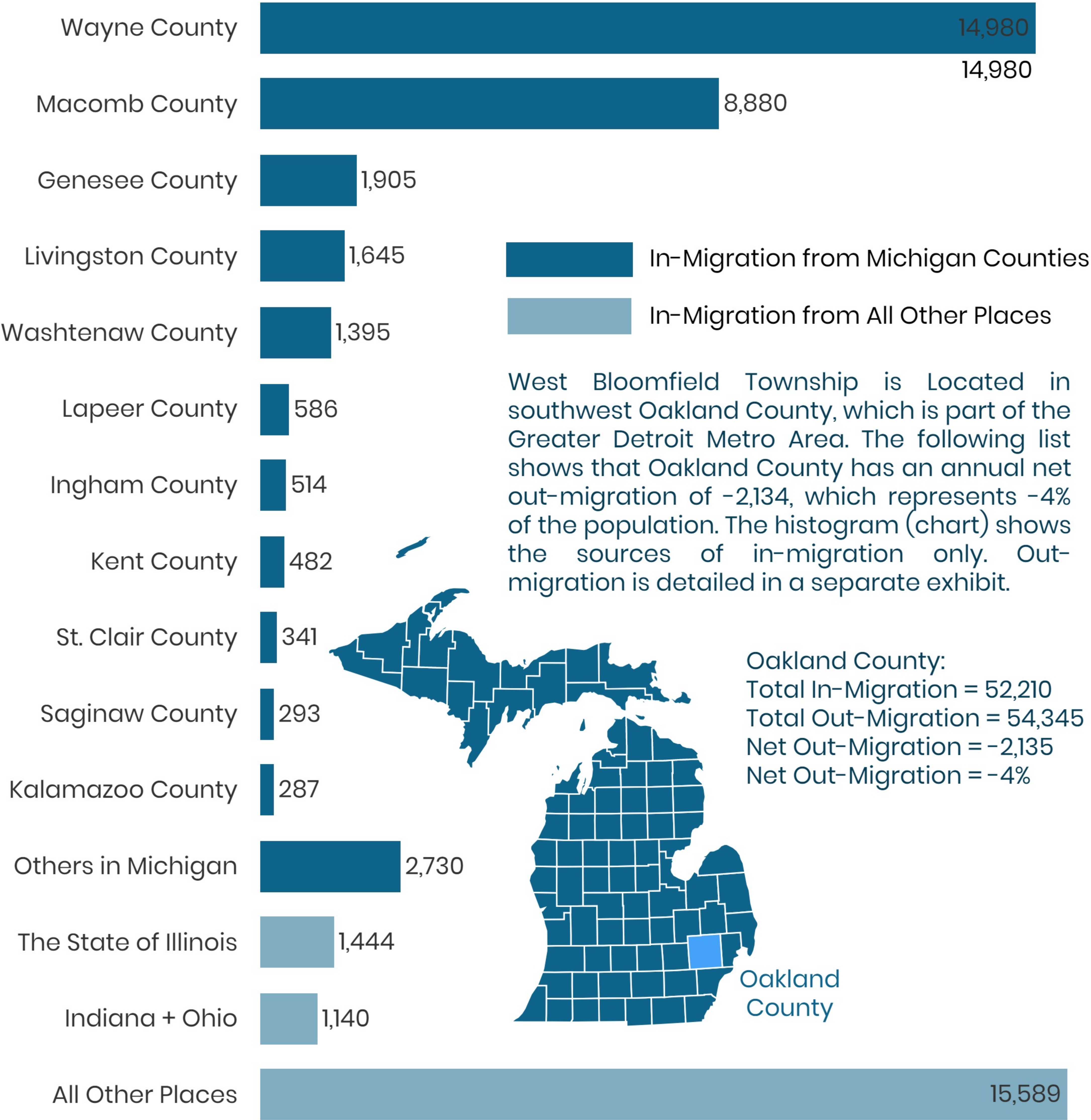
Renter Incomes & Prices | West Bloomfield

A comparison of renter-occupied household incomes and contract rents.



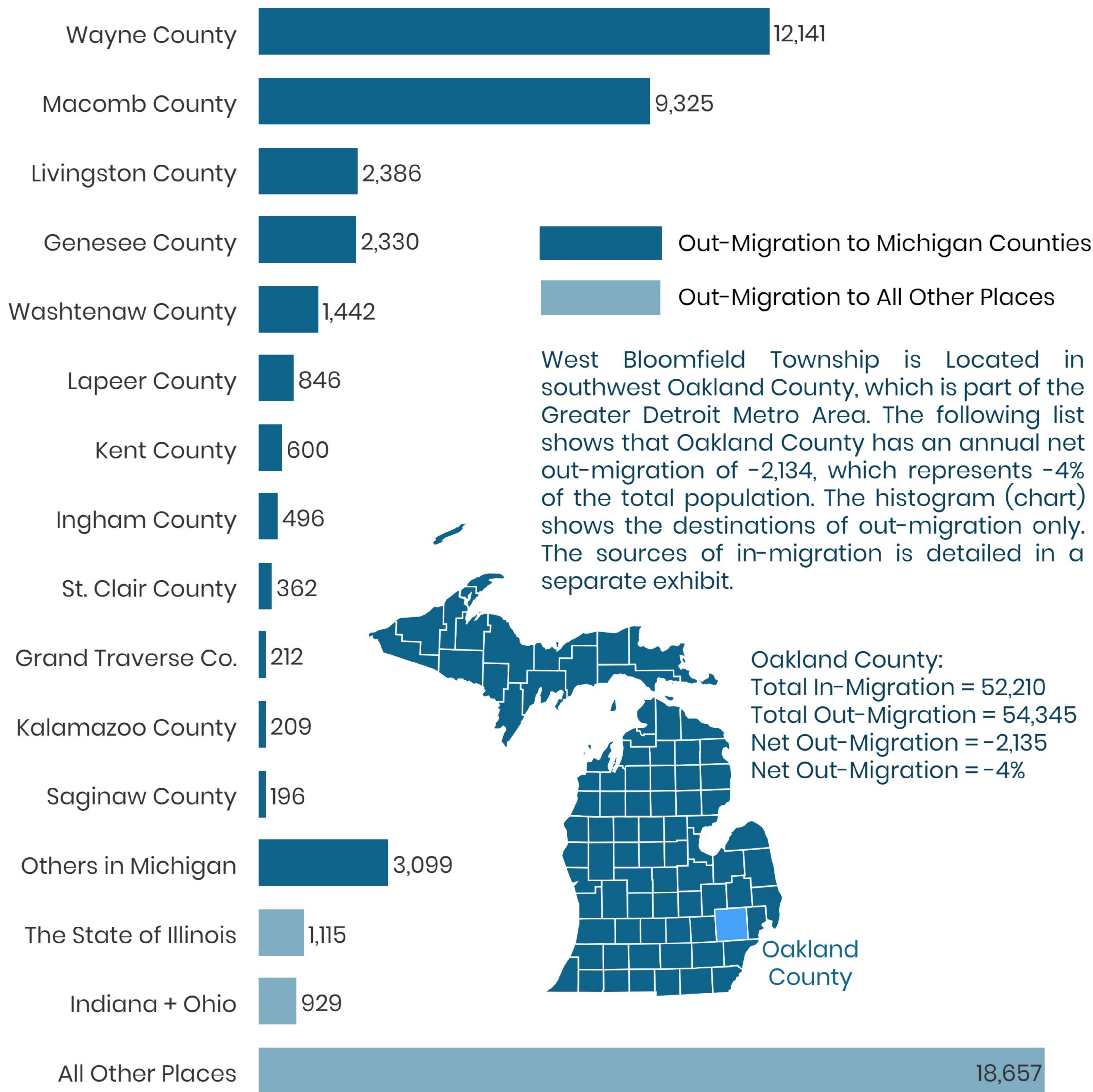
In-Migration | Oakland County

Sources of population migrating into the county, unadjusted for out-migration.



Out-Migration | Oakland County

Destinations of population migrating from the county, unadjusted for in-migration.

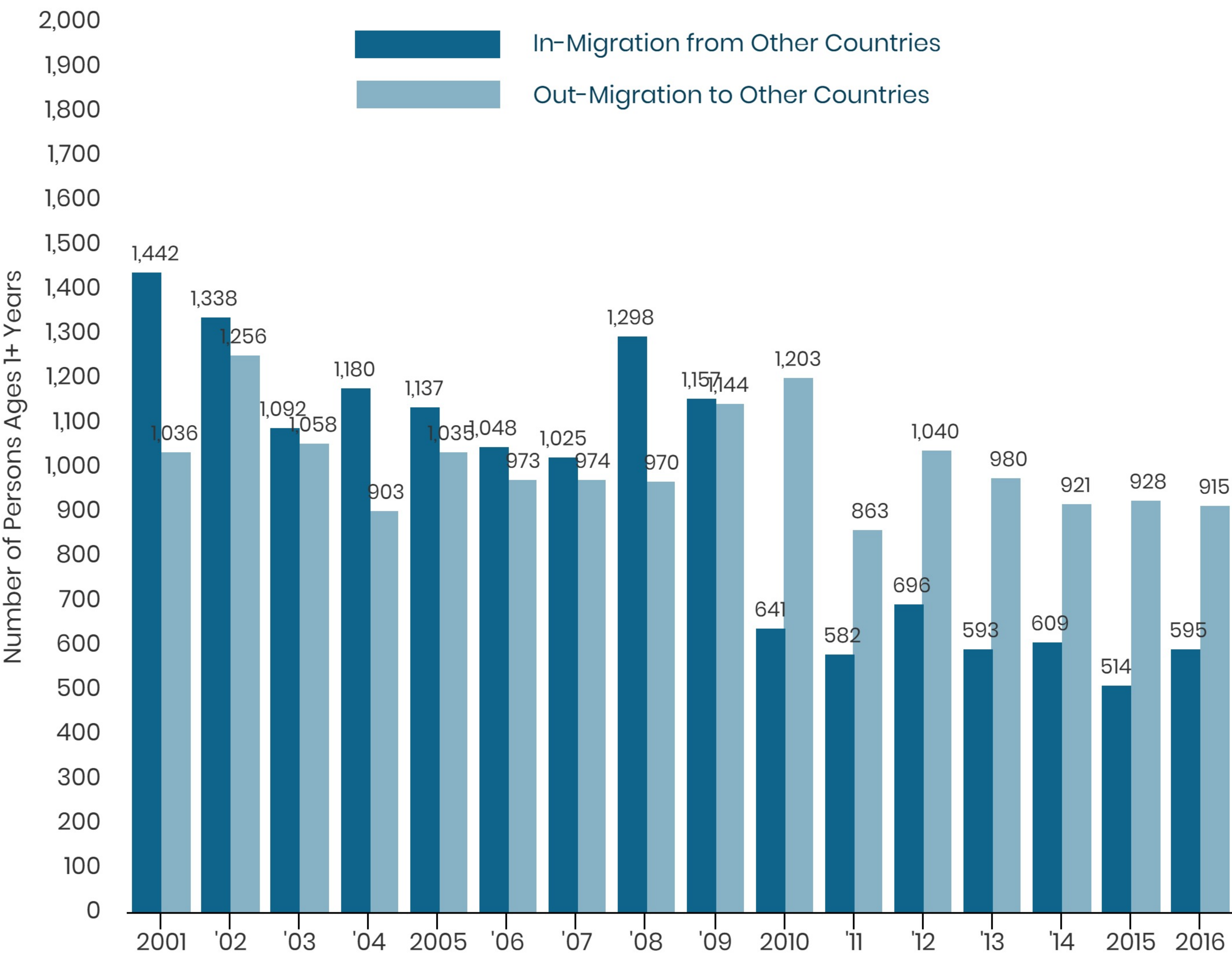


LandUseUSA
UrbanStrategies

Underlying data based on individual tax returns as reported by the IRS, 2015-2016. Analysis and exhibit prepared by LandUseUSA © on behalf of West Bloomfield Township, 2018.

Migration from Other Countries | Oakland Co.

Total population migrating to and from other countries across the globe, over time.



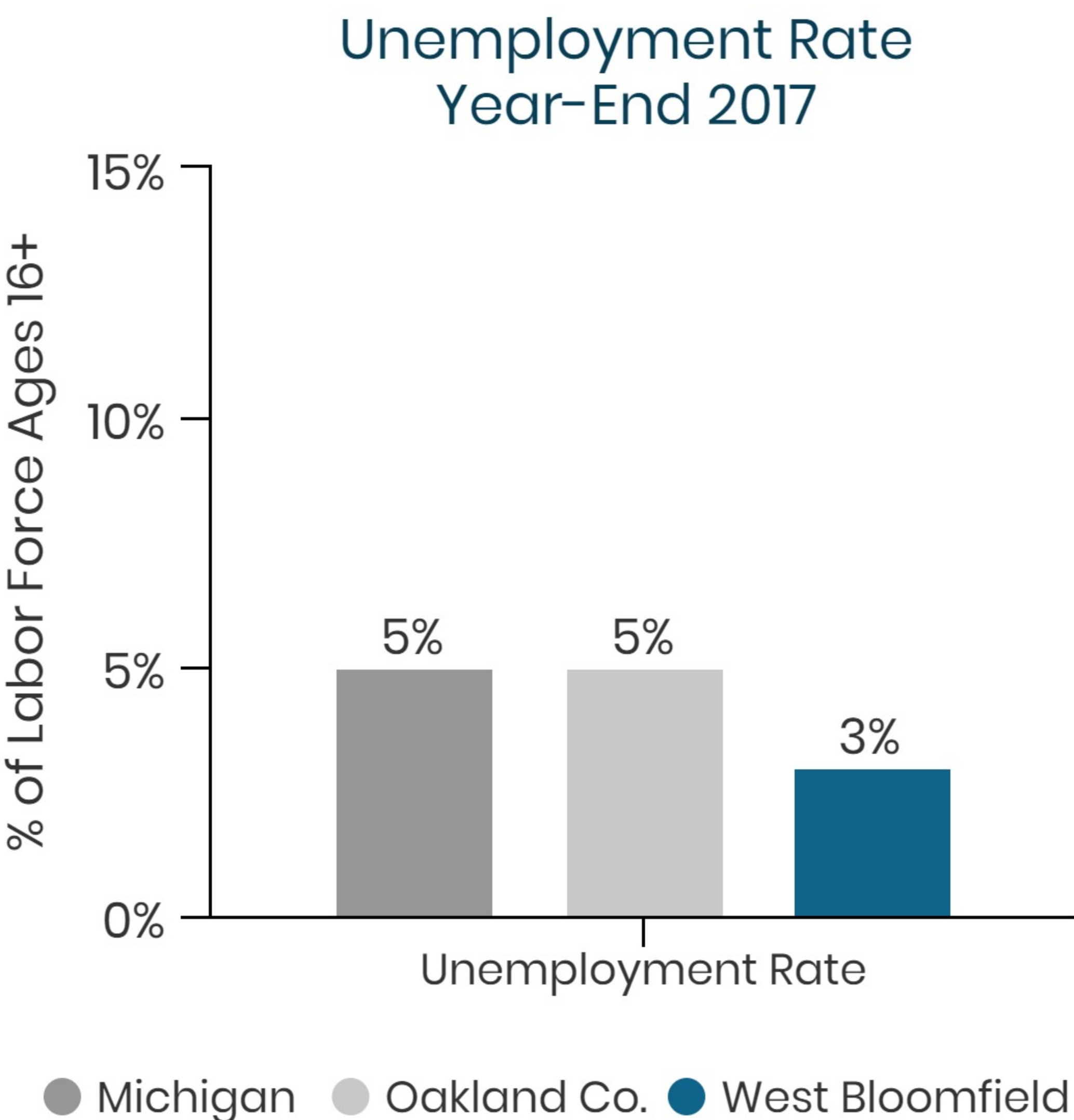
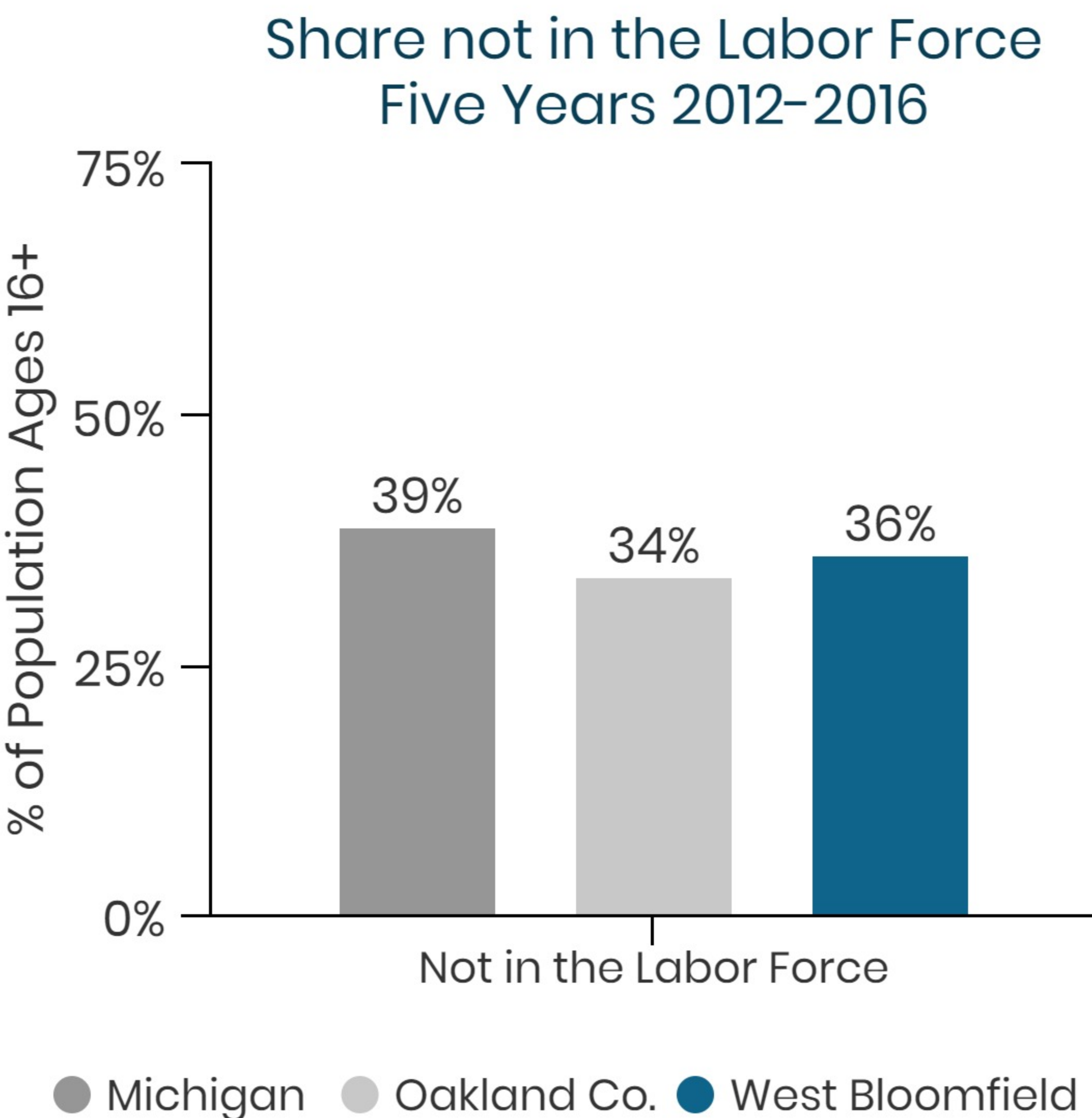
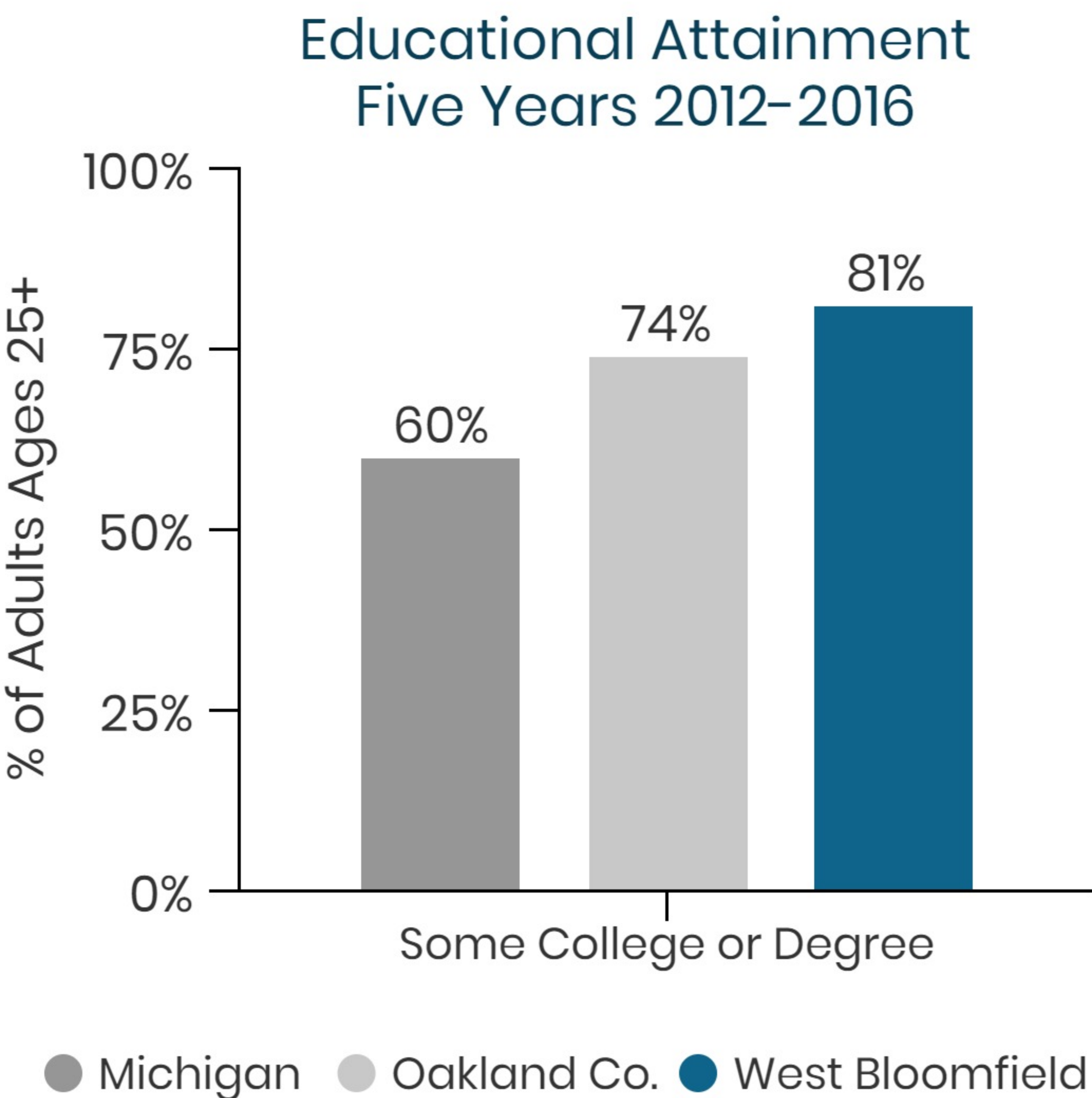
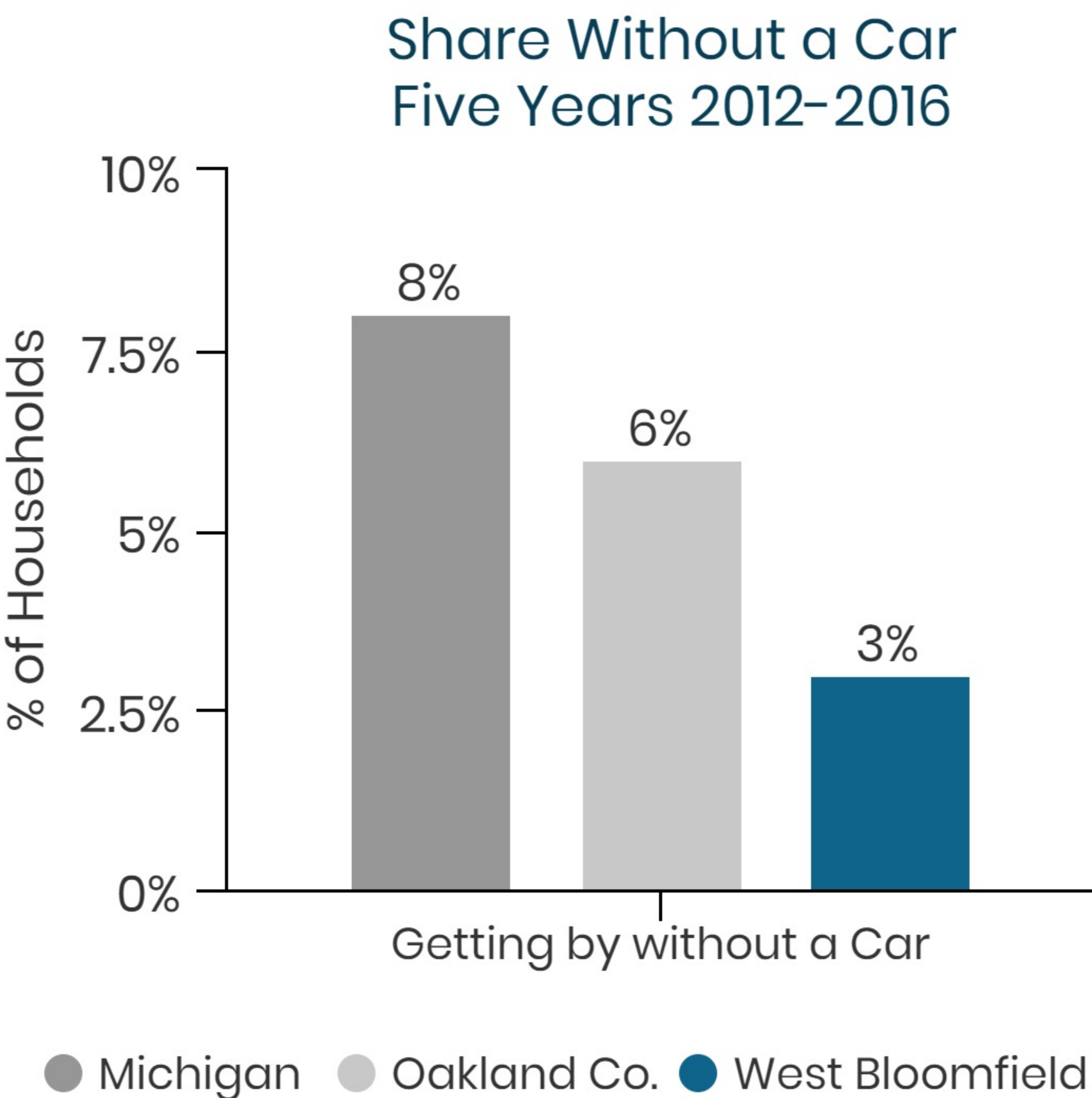
Prior to the Great Recession, in-migration into Oakland County from other countries was exceeding out-migration. That trend has since reversed, and out-migration is now exceeding in-migration. Based on historic trends, the County the rate of in-migration of new residents have significantly declined since the Great Recession. Building missing housing formats (like for-lease, attached townhouses and lofts) could enable the Township to compete for these transient and migrating households and enhance the community's cultural diversity.

Section **H**

Economic Assessment

Education, Labor, Cars | West Bloomfield

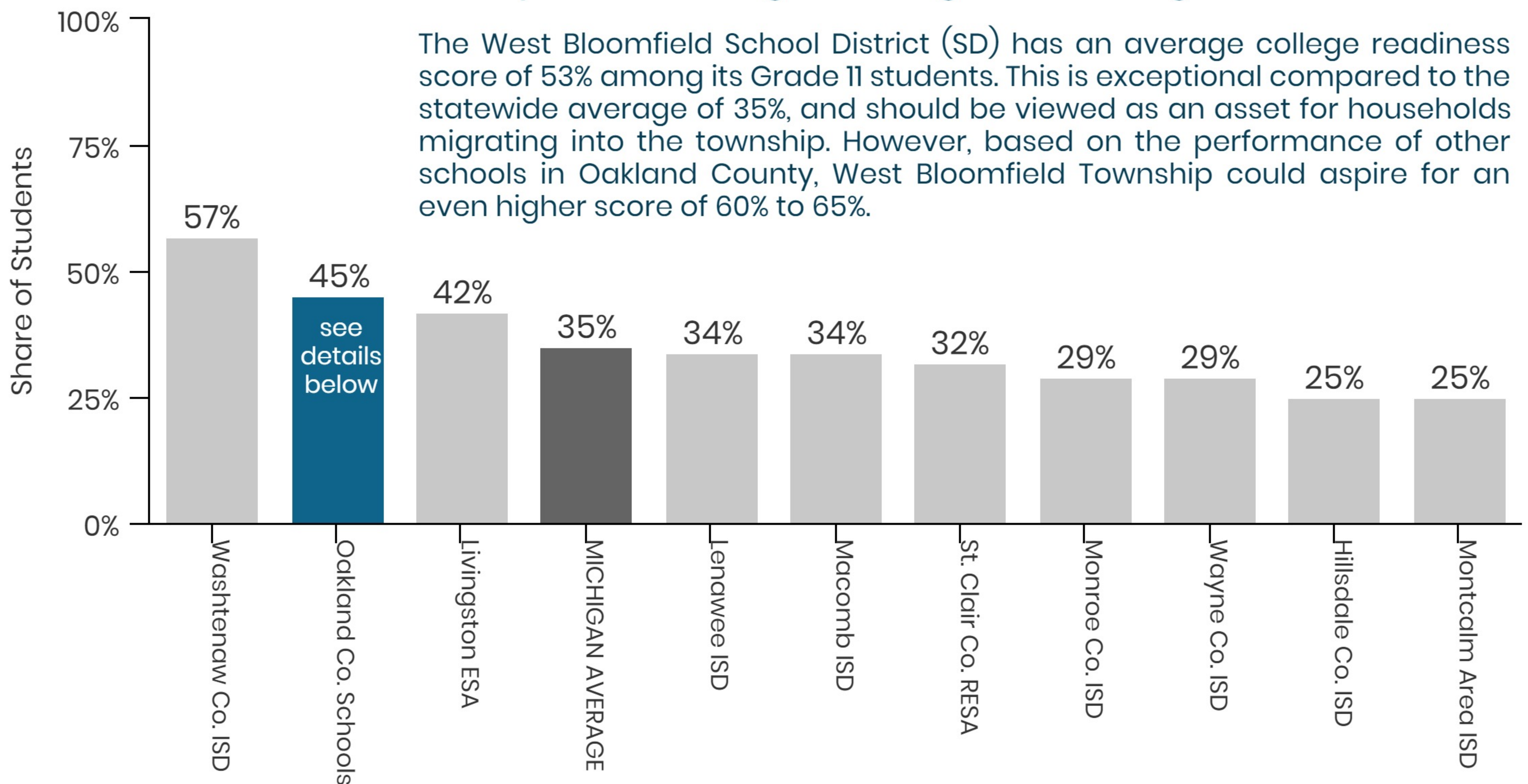
A comparison of vehicle ownership, education, labor force, and unemployment.



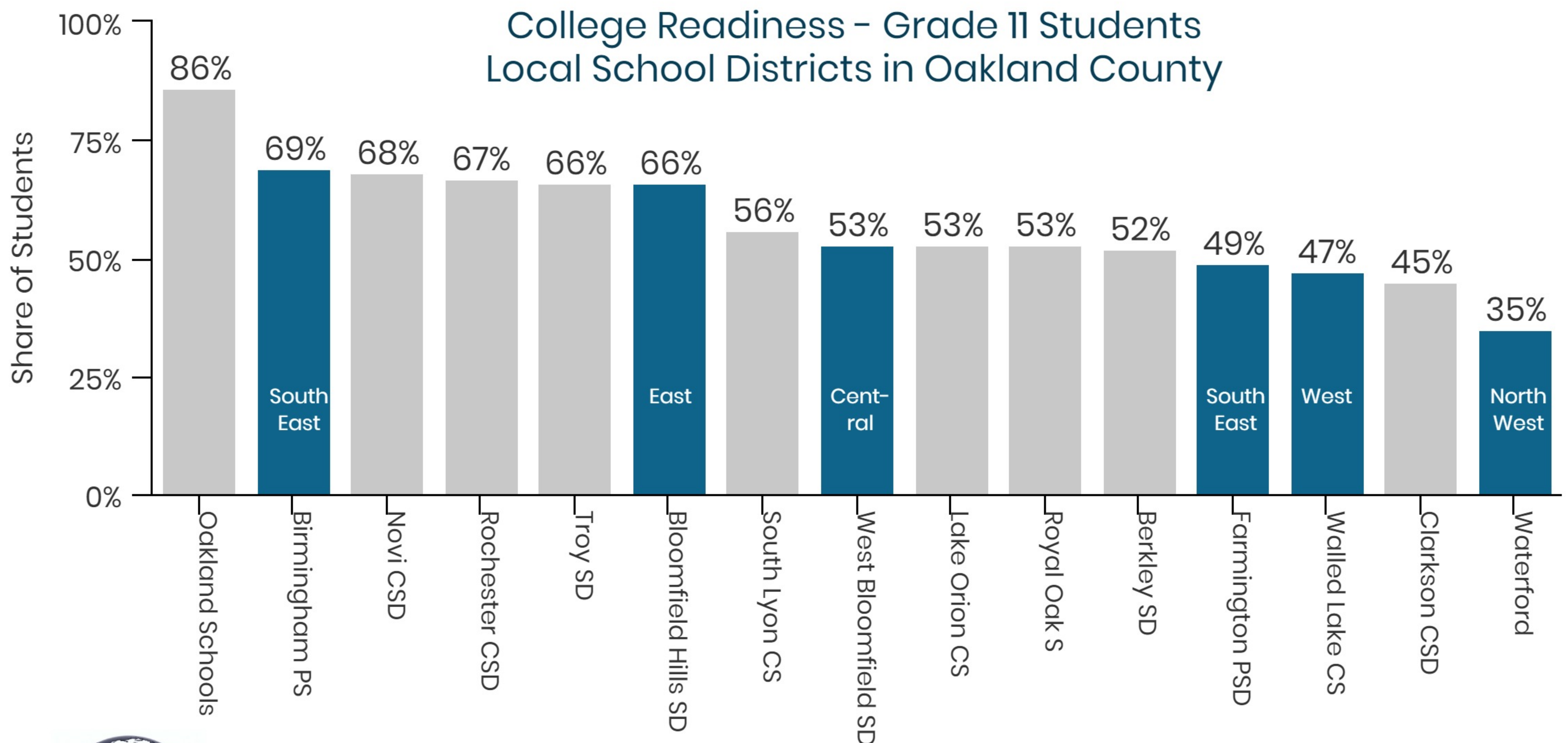
College Readiness – West Bloomfield

A comparison of college readiness among Grade 11 students, based on SAT Scores.

College Readiness – Grade 11 Students County-Wide Averages throughout the Region



College Readiness – Grade 11 Students Local School Districts in Oakland County



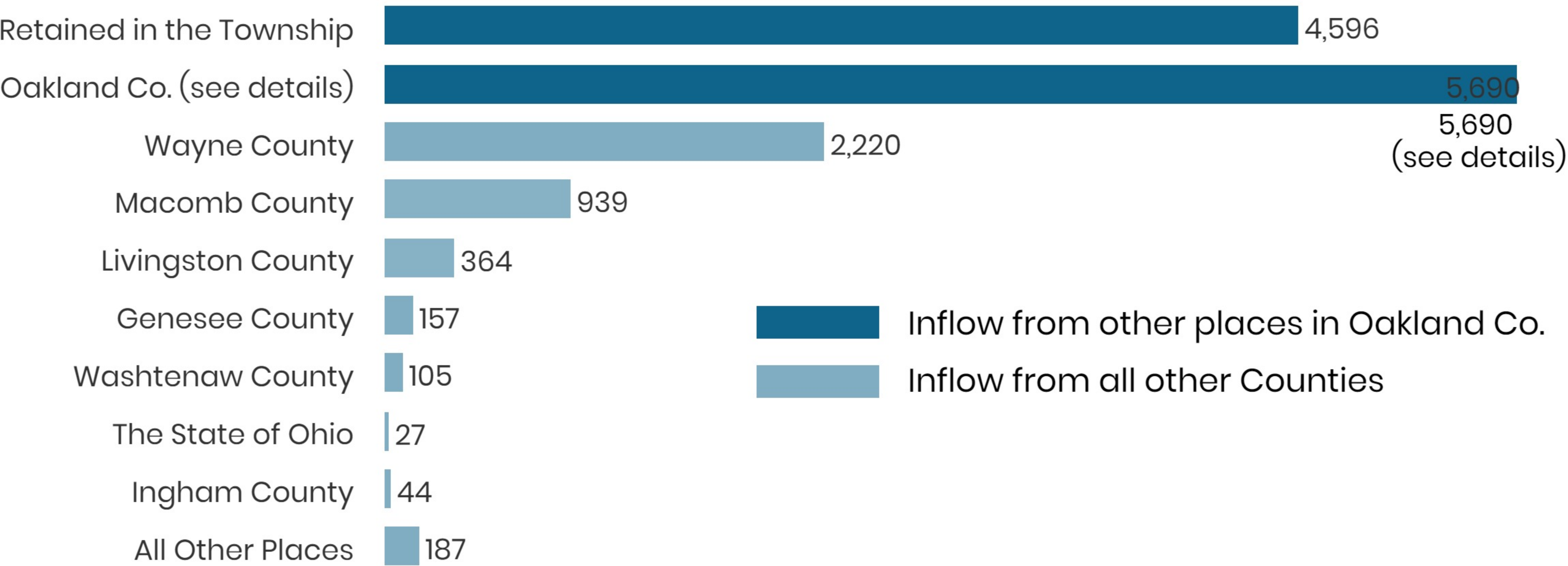
LandUseUSA
UrbanStrategies

Data represents the share of Grade 11 students who met, were proficient, or advanced relative to the College and Career Readiness (CCR) standard for Adult Education, and based on their Scholastic Assessment Test (SAT) Total Scores in 2016 and 2017. Standards have been established by the U.S. Dept. of Education, and reported by the Michigan Dept. of Education. This data is consistent with reports on MISchoolData.org. Analysis and exhibit prepared by LandUseUSA, LLC © on behalf of West Bloomfield Township, 2018.

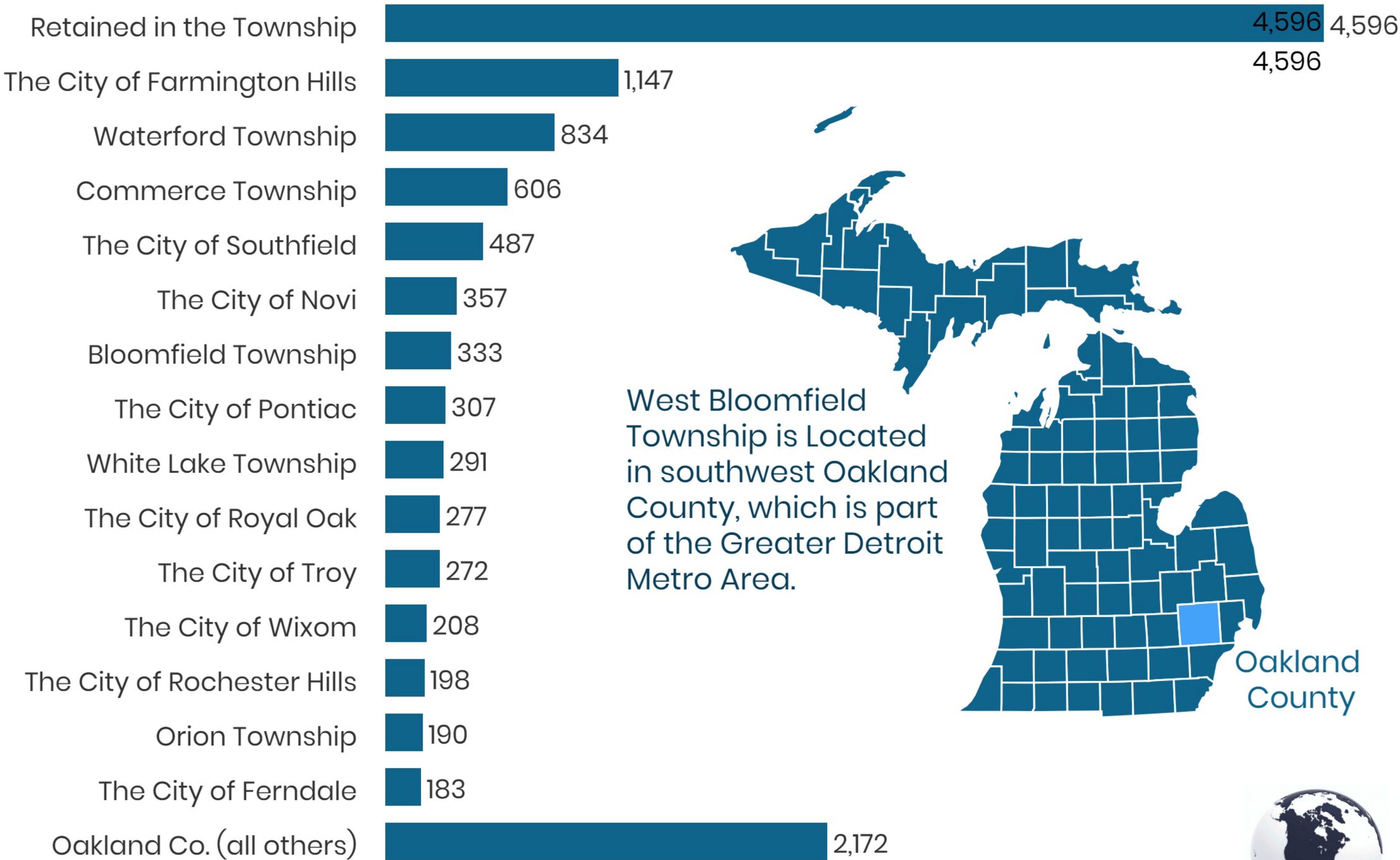
Worker Inflow | West Bloomfield

The number of workers commuting into the township each day, unadjusted for outflow.

Sources of Worker Inflow into West Bloomfield Township



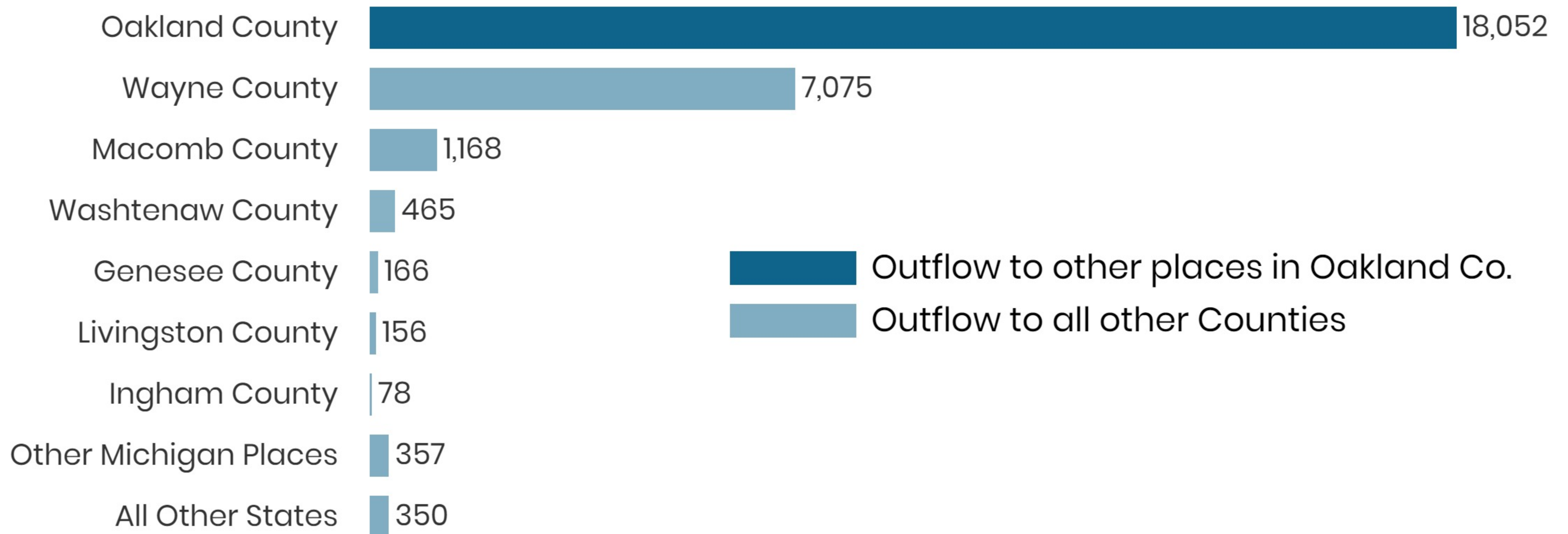
Sources of Worker Inflow into West Bloomfield Township (Details)



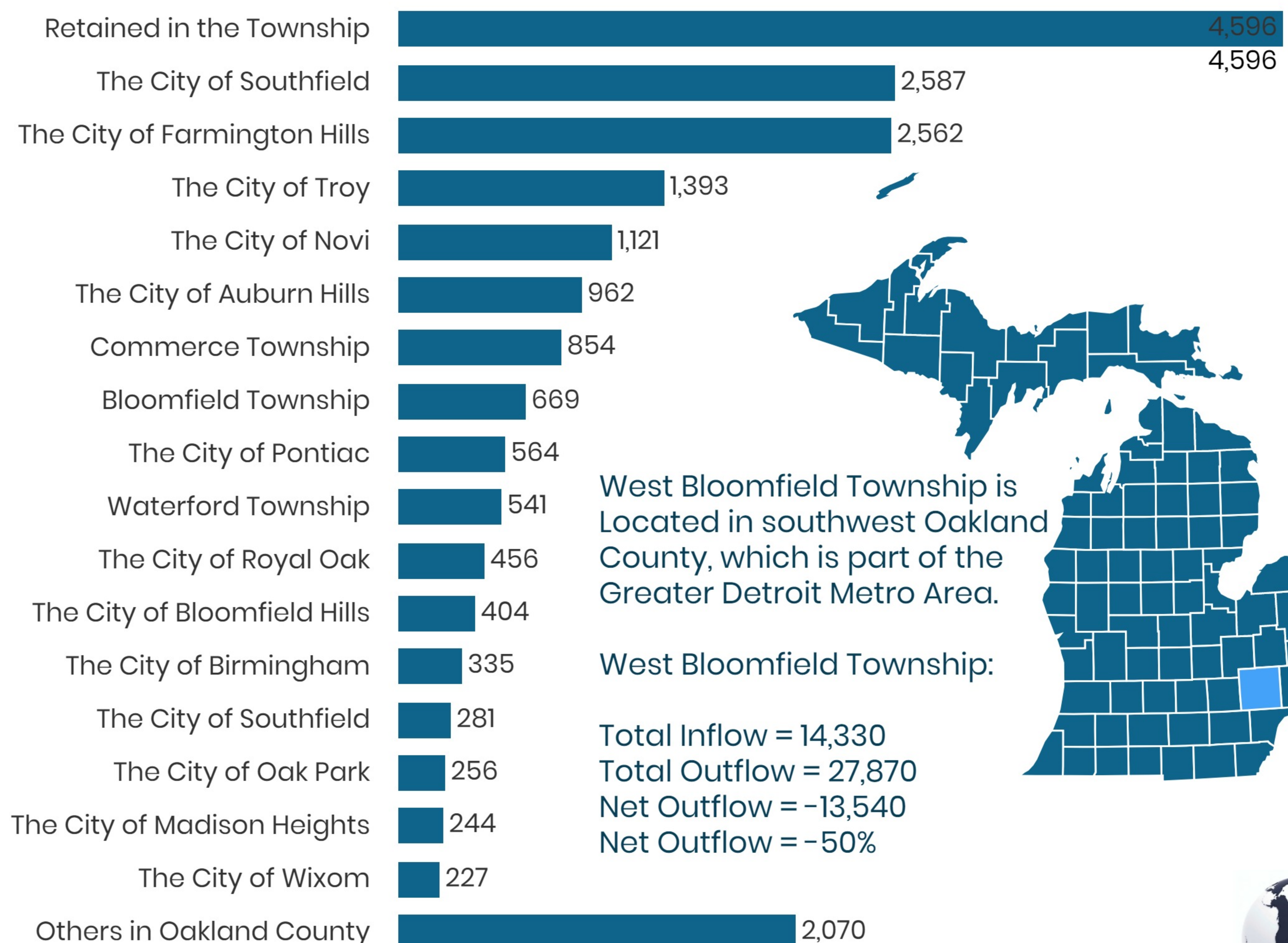
Worker Outflow | West Bloomfield

The number of workers commuting to other places each day, unadjusted for inflow.

Destinations of Worker Outflow from West Bloomfield



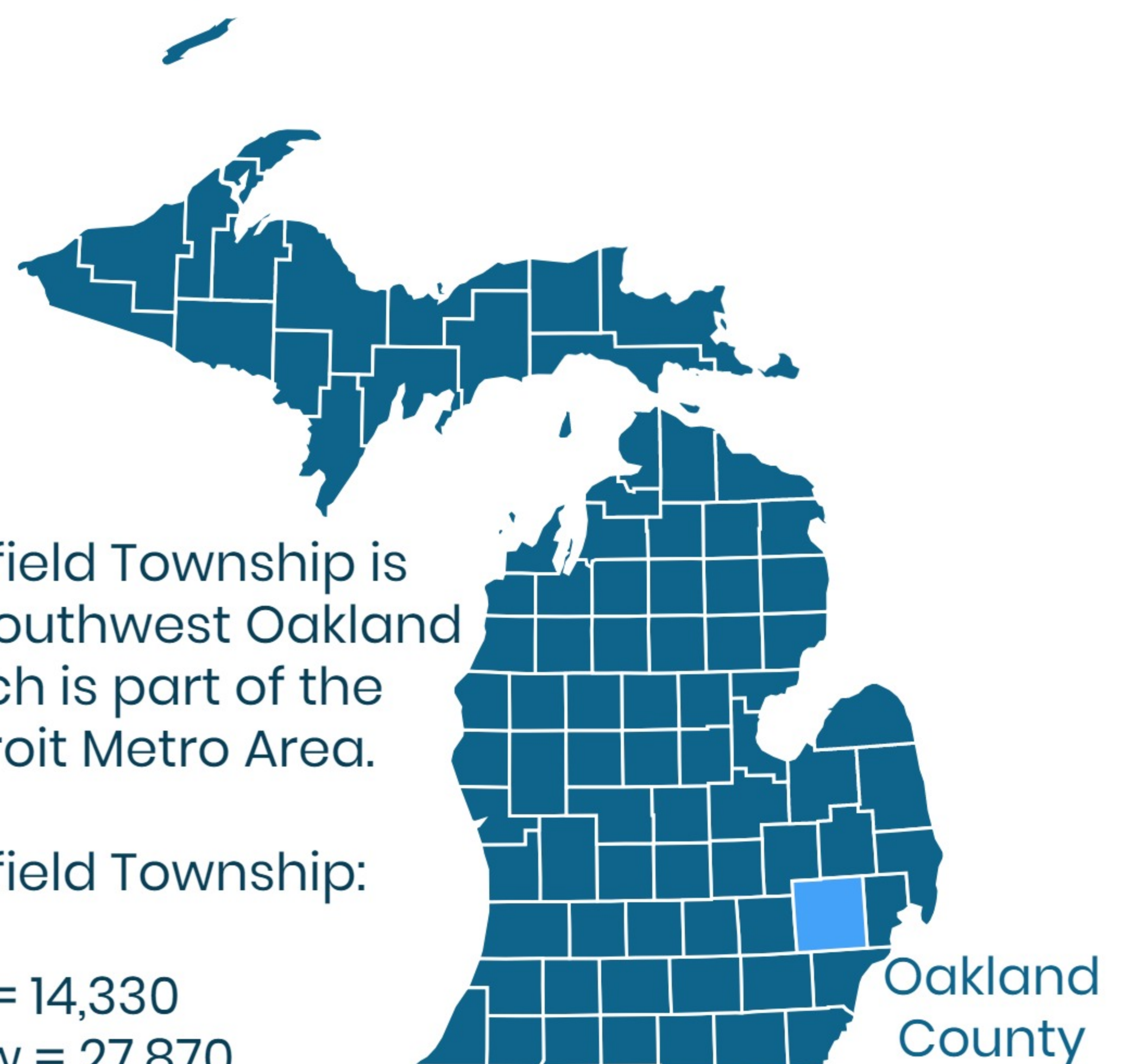
Destinations of Worker Outflow from West Bloomfield (Details)



West Bloomfield Township is located in southwest Oakland County, which is part of the Greater Detroit Metro Area.

West Bloomfield Township:

Total Inflow = 14,330
Total Outflow = 27,870
Net Outflow = -13,540
Net Outflow = -50%



Average Daily Traffic | West Bloomfield

Assessment of visibility to highway traffic for potential advertising exposure.

Observations – Traffic volumes are exceptionally high along most of the highways surrounding West Bloomfield Township. Traffic volumes are approaching 160,000 vehicles daily along east-west Interstate 696; and approaching 90,000 along north-south telegraph road. Even the secondary highways have high volumes, including 38,000 vehicles daily along east-west Highway 59; and 68,000 vehicles north-south along the Highway 5 north spur.

The high volumes cumulatively represent about 60 million advertising exposures annually, which could be leveraged to market the township's amenities and assets.

