

Facility/Project Identification

Facility Name: Oak Trace		
Street Address: 250 Village Drive		
City and Zip Code: Downers Grove 60516		
County: DuPage County	Health Service Area: 007	Health Planning Area: 7-C

Applicant /Co-Applicant Identification**[Provide for each co-applicant [refer to Part 1130.220].**

Exact Legal Name: Lifespace DG, LLC d/b/a/ Oak Trace		
Address: 4201 Corporate Drive, West Des Moines, Iowa 50266		
Name of Registered Agent: Jodi Hirsch		
Name of Chief Executive Officer: M. Sloan Bentley		
CEO Address: 4201 Corporate Drive, West Des Moines, Iowa 50266		
Telephone Number: (515) 309-4467		

Type of Ownership (Applicant/Co-Applicants)

☐ Non-profit Corporation	☐ Partnership	
☐ For-profit Corporation	☐ Governmental	
☒ Limited Liability Company	☐ Sole Proprietorship	☐ Other

- o Corporations and limited liability companies must provide an **Illinois certificate of good standing**.
- o Partnerships must provide the name of the state in which organized and the name and address of each partner specifying whether each is a general or limited partner.

APPEND DOCUMENTATION AS ATTACHMENT-1 IN NUMERIC SEQUENTIAL ORDER AFTER THE LAST PAGE OF THE APPLICATION FORM.

Primary Contact**[Person to receive ALL correspondence or inquiries]**

Name: Kara M. Friedman
Title: Shareholder
Company Name: Polsinelli
Address: 161 N. Clark Street, Suite 4200, Chicago, IL 60601
Telephone Number: (312) 873-3639
E-mail Address: kfriedman@polsinelli.com
Fax Number: (312) 602-3717

Additional Contact**[Person who is also authorized to discuss the application for permit]**

Name: Jodi Hirsch
Title: Senior Vice President and General Counsel
Company Name: Lifespace Communities, Inc.
Address: 4201 Corporate Drive, West Des Moines, Iowa 50266
Telephone Number: (515) 288-5805
E-mail Address: Jodi.hirsch@lifespacecommunities.com
Fax Number: (515) 288-5911

Corrected



Fairview 2009 Facility Assessment Report Update



October 27, 2009

ARCH Consultants, Ltd.
250 Parkway Drive, Suite 160
Lincolnshire, Illinois 60069
(847) 541-3220
www.archltd.com

ARCH



Executive Summary

The following is a summary of the data attached. The Fairview facility ten year forecast was developed on a per building basis. Refer to the attached back-up material for each building area which is summarized on a yearly basis for the costs associated for the exterior, interior and grounds respectively. Projections for costs were derived from a site investigation and information received from the campus.

The physical plant assessment indicates good overall maintenance of the Village facility. A number of capital replacement projects should be incorporated in upcoming campus budgets. The physical plant assessment indicates a significant amount of deferred maintenance of the Home facility. A number of capital replacement projects should be incorporated in upcoming campus budgets. The forecast for this year assumes the current planned capital projects will be completed. There are several issues that should be addressed and incorporated in the upcoming campus budgets. A few major items that are recommended to be addressed in the near future are the following:

Fairview Baptist Home

- The original design and operation of the HVAC system is unknown. It is believed that over the years the system has been compromised. Staff is operating the system with their best judgment. It is recommended that a mechanical engineer be retained to determine how the system should be piped, balance and operated.
- The HVAC system should be adjusted based on the engineer's recommendations.
- Continue replacing valves throughout the facility as required.
- Interiors – ceiling grid and tiles are stained, rusted and miss matched. They should be replaced.
- If elopement remains and issue, security system should be upgraded to delayed egress at code allowed exit doors.
- Hydronic pipe of mechanical system has begun failure. Repair as required.
- Investigate natural gas drop in pressure issue.
- Replace varies mechanical equipment, such as aged pumps. Etc...
- Provide ventilation at indoor condensing units. Convert water cooled condensers.
- If building will be in operation in 2013, install quick response sprinkler heads.
- Code required upgrades.

- Possible upgrades to consider
 - The HVAC and fire alarm system for the facility does not meet current codes, standards and regulations. They can exist as per the status quo because the system is “grandfathered”, which means it can remain as long as the areas the system serves, does not get remodeled/renovated. Any remodel/renovation project could trigger losing the “grandfather” status. The governmental agencies that have jurisdiction over this facility can also require upgrading to current standards and codes. It is recommended that the facility be brought to meet these standards and codes if the master plan is for the facility to remain. The cost for upgrading the associated systems has not been incorporated into this report. Examples are the following:
 - Fire Alarm system in the resident’s rooms (detectors and closers).
 - Make-up air to all resident rooms.

Fairview Village

- It is recommended to have the HVAC balanced to operate at high efficiency by outside contractor.
- Complete Fire Marshall and code required changes.
- Exterior – investigate and water issues at upper windows sills.
- Repair water issues at dinning room lower roof area.

Townhome and garden Homes

- Roofs are reaching their useful life, and a replacement plan should be developed for the next several years. It is recommended to create proper venting at eaves and replace gutters.
- Windows are leaking water and have air infiltration. Window replacement program should be investigated.
- Siding and Trim – There are high maintenance details on the exterior of the building that were not maintained. The trim in some locations is rotting. Vinyl side has allowed water to enter the exterior wall. There are signs of water damage under many of the windows.

Site

- Repair pavement as required in several areas that have alligator bituminous pavement.
- Repair uneven walkways to maintain accessible route.



The total projected costs equate to \$10,809,147 from 2009 to 2018. The average yearly expense would be \$1,145,461. An escalation factor was not applied and all figures are in 2009 dollars. This assessment is based on information provided by the campus and gathered through sources believed to be reliable; however, such documents must be considered relevant only as of the date of the report and preliminary in nature warranting further investigation.

The study also assessed 'Other' potential capital expenditures necessary such as emergency funds, refurbishment of existing apartments, other capital expenditures (see attached 2010 capital plan), and furniture (FF&E). The assumptions made are suggested figures and not direct estimates. These Other potential issues are an average yearly expenditure of \$559,444 between 2010 and 2018. This would yield another \$5,035,000 in potential capital expenditures over the next nine years based upon preliminary assumptions outlined. The large exposure of these allowances warrants detailed budgeting of the items suggested. A FF&E inventory and replacement program would more clearly define some of these costs.

A recommended first step of our proposed facility management support is to prioritize short-term capital expenditures and standardize process for purchase order approvals. Depending upon the timeline for replacement of the Home, decisions regarding the physical plant can be made accordingly.

X 16-056



DOWNERS GROVE FIRE DEPARTMENT

5420 Main, Downers Grove, IL 60515 630.434.5980

December 20, 2016

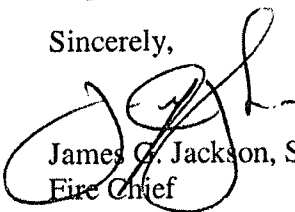
To Whom It May Concern:

For over forty years, Oak Trace (formerly Fairview Baptist Home) has provided high quality living accommodations, programs and healthcare services to seniors in the Downers Grove Township under both the previous owner, Fairview Ministries, and the current owner, Lifespace Communities, Inc. Oak Trace is a licensed life care Continuing Care Retirement Community ("CCRC") and is currently home to approximately 230 residents.

Oak Trace is currently preparing to modernize and redevelop its healthcare center to provide better quality of care and additional services to current and prospective residents. Oak Trace's plans include the construction of a new four-story healthcare building on the same parcel of land as the current skilled nursing facility. The healthcare facility will consist of a new 102-bed replacement nursing unit and associated physical therapy and rehabilitation space, as well as 66 new assisted living apartments and 28 new memory support assisted living suites. The redeveloped skilled nursing unit will continue to serve the needs of the seniors in the Downers Grove and surrounding population as well as current and future residents of the CCRC. It will provide modern nursing rooms and predominantly private rooms in a neighborhood setting, and will add a level of living – memory support assisted living – not previously available to seniors at Oak Trace.

The Downers Grove Fire Department supports the redevelopment plans of Oak Trace and recommends the approval of the community's Certificate of Need Application by the Illinois Department of Public Health.

Sincerely,


James G. Jackson, Sr.
Fire Chief

cc: Chris Romick, Executive Director - Oak Trace



250 Village Drive
Downers Grove, Illinois 60516

P. 630.769.6200
F. 630.769.6226

OakTraceDG.com

December 23, 2016

#16-056

To Whom It May Concern,

Oak Trace (formerly Fairview Baptist Home) is a Continuing Care Retirement Community (CCRC) in Downers Grove where approximately 400 seniors receive personalized and quality health care and services.

Oak Trace is in the process of redeveloping and upgrading its health care center to further enhance care services and programs for current and prospective residents. Oak Trace's plans include constructing a new skilled health care center with the capacity for 102 residents living in a neighborhood setting. The neighborhoods would have mostly private rooms allowing our residents even more privacy in a homelike setting. This building will consist of physical therapy, rehabilitation areas and memory support. Oak Trace would add assisted living apartments and memory support suites, which are greatly needed. We are eager to continue serving the seniors in Downers Grove by improving our care setting and accommodations in order to enrich the lives of the members of our community and those in the surrounding community.

As the administrator of the health center at Oak Trace, I support the redevelopment plans of Oak Trace and recommend the approval of the community's Certificate of Need Application by the Illinois Department of Public Health. I could not be any more grateful for this opportunity for the residents that I serve at Oak Trace.

Sincerely,

Michelle Hart-Carlson,
Oak Trace administrator

