



Mr. Jonah Andrews, CEO

McBride Stephens, LLC

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Huddleston, VA 2451

**Client Proposal for McBride Stephens LLC- Located at Smith Mtn Lake**

Dear Mr. Andrews,

Thank you for taking me on as a consultant for this exciting Smith Mountain Lake project. This will be a complex job, but I am so grateful you have allowed me to partner with you on this endeavor. Moreover, I have no doubt that we can fulfill a need in the community and design a facility that is multifaceted and innovative. At any time during this process, please do not hesitate to contact me with questions, concerns, or clarification. I look forward to working with you in the future.

The following summary of best practices, trends, amenities, and the local competition will all contribute to a proposed senior living facility. This facility will be located at 0 Horseshoe Bend Rd in Goodview, VA. The whole lot is a little over 53 acres, making the property a true investment and allows for further expansion in the future or possible leasing of multiple lots. It's grand, waterfront site is in a highly desirable area; its whereabouts are not only very accessible to a general store for convenient items, but the property is only half an hour from two separate hospitals and an eight-minute drive to a grocery store. In addition, the lot is near to restaurants, salons, and a post office. These details are very important for those who are aging to maintain autonomy and independence. Those staying in this complex will be able to enjoy a variety of activities that the lake provides, as well as the different selections from the area. From taking tours of a dam, to spending a day in the Smith Mtn Lake Community Park, the location of the senior living facility gives individuals opportunities to experience all the lake has to offer. The facility is on the Northeast side of the lake, opposite of many other comparable facilities that provide independent housing, assisted living, and memory care options around the lake.

For this project, I would recommend developing an independent housing option. In the Goodview area, there are no senior apartments or any apartment complexes. Moreover, I believe by adding this facility in this location, people who might not have been able to be so close to the water, could finally have a chance to do so. We see from looking at demographics of the area, 80% of the population are either of “working age” or considered “aging”. Of this statistic, 25% of the population are above the age of 65. This means there is a need for this type of building now and certainly in the future as well. In addition, over 25% of Hardy is of the aging population as well. Moneta is another bordering town with 33% of its population over the age of 65. In these neighboring towns, there is only one senior living facility operating within their cities, but no senior apartment complexes. For the project at hand, I believe it to be the best move to start with an independent living facility. Giving individuals from Goodview, as well as neighboring towns the option to live independently and comfortably close to home will be advantageous. Additionally, with the piece of land selected there is plenty of room to provide privacy and community all at the same time.

### **Summary of Best Practices**

It is important to know what other independent living facilities are offering that set them apart from the competition. In 2021, there were a few stand out senior living facilities worth looking at. Some of the facilities that appeared in my search were the Masonic Village at Elizabethtown, The Clare, Shell Point Retirement Community, Maravilla, and Provident Crossings Retirement Community. Of these noted top senior independent living facilities across the country, I noticed the importance of continuing care. It is important that once a resident settles in at a facility, they want to have all they would need, should their health decline. Therefore, residents should still be able to stay at the same facility even if their healthcare needs change. While for our project, we will start our phasing with the independent living facility, we will certainly add other senior living facilities in the future. With that said, nurses should be on staff for the resident’s needs even if you start out with the independent living facility first. Continuing, the overall aesthetic of each of these leading facilities is much like a resort. From the moment an individual tours the space, to the day they choose to stay, they are taken care of. Professionalism and great customer service are truly appreciated and internalized. In addition, the overall care of the facility and grounds plays a large role in making the complex feel luxurious. At all these communities, there are a variety of living options, whether it be 2-bedroom apartments, stand-alone houses, or etc. There is uniqueness to the spaces and by having options, it

allows guests to choose where they want to stay. The last categorically important aspect of these communities is that they provide a ton of options for extracurricular activities. Residents can stay busy with a multitude of different events and hobbies within the campus. Moreover, it is nice when those of older age do not need to travel far for different errands or activities.

### **Trends and Cutting-edge Amenities**

There are many different amenities that if included in your senior living facility will really help McBride Stephens stand out. One of the biggest trends I am seeing is the inclusion of different services right on campus. These services include, but are not limited to haircuts, massages, manicures, pedicures, etc. These are great pastimes for couples, friends, and individuals. The convenience of these services is really popular. In addition, many facilities are including more ways that individuals can stay active, whether indoor or outdoor. We can see that places have chosen to create more outdoor living spaces that include tennis courts, pickleball courts, walking paths, etc., further encouraging exercise and socialization. With that said, some might not be able to do as much physical activity, so the option of heated indoor and outdoor pools and spa has been well-liked by residents. For those who like a more traditional workout, having a fitness center with everything from cardio or resistance training equipment is great as well. Areas that provide additional opportunities to stay busy are becoming trendier. These areas might include, a gallery, library, café, studio, etc. In contrast, it is also good to have more general, multifunctional spaces that promote community and group endeavors. In terms of food options and dining, to stay ahead in this area, there should be multiple culinary choices and dining layouts. Individuals want options and need their food to be to a certain standard. Moreover, this is not an area that should be overlooked. Safety is always important and trending; moreover, having 24-hour security is an excellent idea.

### **Summary of Local Competition**

<b>Facility</b>	<b>Town</b>	<b>Independent Living</b>	<b>Assisted Living</b>	<b>Memory Care</b>	<b>Key Ammenities/features</b>
<b>Runk &amp; Pratt at Smith Mtn Lake</b>	<b>Hardy</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>Private and semi-private rooms</b> <b>Spacious Common Areas</b> <b>Outdoor patio with gardens</b> <b>Beauty Parlor/Barber Shop</b> <b>Private dining rooms</b> <b>Physician appointments</b> <b>Medical oversight</b> <b>Medication management</b> <b>On-site therapy</b>

<b>Woodland Hills Community</b>	<b>Roanoke</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>specialized activity programs</b> <b>24-hour staffing nursing oversight</b> <b>Routine health monitoring</b> <b>Family-style meal services</b>
<b>The Harmony Collection at Roanoke</b>	<b>Roanoke</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>Spacious 1- &amp; 2-Bedroom Floor Plans</b> <b>Delicious Chef-Prepared Meals</b> <b>Engaging Calendar of Events &amp; Activities</b> <b>Concierge Services</b>
<b>Pheasant Ridge Senior Living</b>	<b>Roanoke</b>		<b>X</b>	<b>X</b>	<b>Weekly housekeeping</b> <b>Life enrichment program</b> <b>24-hour Emergency call system</b> <b>Convenience of an on-site salon</b> <b>Convenience of on-site therapy</b>
<b>Elm Park Estates</b>	<b>Roanoke</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>Activity Room</b> <b>Barber/Beauty Salon</b> <b>Chapel</b> <b>Fitness Equipment</b> <b>Library</b>

From the chart above, you can see a brief outline of what these different facilities have to offer in terms of their services. You can also see what key features or amenities these locations have to offer. Without a doubt Runk & Pratt at Smith Mtn Lake will be the biggest competition for the area. It is located only 16 minutes from the proposed property. This competitor has a great reputation and is highly liked by residents and the community. They offer the three forms of care that we are looking to develop and are up to date with their practices. With that said, other than Runk & Pratt, the towns bordering Goodview do not have any sort of facility like the one you are looking to build. Therefore, location wise, I believe this is the best available option. Runk and Pratt at Smith Mtn Lake is on 25 acres and can accommodate the type activities we are looking to offer. Therefore, with our acreage and waterfront views, I believe we will be able to hold our own against this large competitor and offer just as much if not more to the community.

**Recommendations**

**Facilities**

The entire scope of the project will include a main independent housing facility. Later down the road an assisted care facility, and then a memory care facility will be constructed. Within the independent housing there will be a variety of spaces that individuals can use for different purposes. These areas will include retail spaces for restaurant or spa type settings. Within the assisted living facility and the memory care facility that will be added in later phases, there will be unique centers to help aid individuals in for their specific conditions and circumstances.

## **Amenities**

Within the main independent housing facility, I believe it's important to include the fitness center, a heated pool, a spa. This building will also be surrounded by walkways and other active spaces. Within the housing itself, it will be all inclusive, with exceptions to the storefront spaces mentioned previously. The resident's rooms will have full room service along with laundry and linen services. Individuals will be able to participate in numerous events the facility puts on. Finally, they can also enjoy the tailored culinary and dining services available.

## **Phasing**

### Phase 1: Construction of Independent Living Facility

This independent living facility will be the first complex constructed. From my research I have found there is a need in the community and feel that this will be the best choice starting off. With the recommendations I have proposed, I believe that you will be able to find your target market and keep serving these individuals through the different stages of their life.

### Phase 2: Assisted living Facility

An assisted living facility will be constructed in the second phase. I found that typically when an individual chooses a senior living facility, they like to continue staying there no matter their condition. I believe that when you are ready to start with this phase, there will be existing residents that can be cared for in this complex. As resident's needs change, it is important to be ready to be proactive and ready for that.

### Phase 3: Memory Care Facility

The last phase will include the construction of a memory care facility. This is the last phase because while I believe there is a need for the complex, I know that there are several facilities around that care for those individuals. We see more people experience memory ailments as they age. Our residents might not initially need this facility, but it is a good idea to present the option.

In the next few weeks, we can dive deeper into what the next steps will look like. I have proposed that McBride Stephens, LLC construct an independent facility that includes a multitude of amenities and features that will help the senior living facility stand out, not only in the community, but in Virginia as well. Further, I have

described future steps to expand the campus and accommodate even more individuals. Once again, if you have any further questions, please contact me at any time.

Thank you so much for taking me on as your consultant.

Signatures:

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Client: Mr. Jonah Andrews

Date



2/2/22

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Lead Designer: Kylie Murphy

Date

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