

**Notice of Planning and Zoning Commission Meeting  
AGENDA**

**December 7, 2021 at 6:00 PM**

**NOTICE TO THE PUBLIC IS HEREBY GIVEN** the Montgomery Planning and Zoning Commission will conduct its Planning and Zoning Commission Meeting scheduled for **6:00 PM on Tuesday, December 7, 2021**, at the City of Montgomery City Hall, 101 Old Plantersville Road, Montgomery, Texas.

Members of the public may view the meeting live on the City's website [www.montgomerytexas.gov](http://www.montgomerytexas.gov) under Agenda/Minutes and then select **Live Stream Page (located at the top of the page)**. The Meeting Agenda Pack will be posted online at [www.montgomerytexas.gov](http://www.montgomerytexas.gov). The meeting will be recorded and uploaded to the City's website.

**CALL TO ORDER**

**VISITOR/CITIZENS FORUM:**

Any citizen with business not scheduled on the agenda may speak to the Commission. Prior to speaking, each speaker must be recognized by the Chairman. The Commission may not discuss or take any action on an item but may place the issue on a future agenda. The number of speakers along with the time allowed per speaker may be limited.

**CONSIDERATION AND POSSIBLE ACTION:**

- 1.** Consideration and possible action regarding approval of the September 7, 2021 and October 5, 2021 Regular Meeting Minutes.
- 2.** Consideration and possible action regarding election of officers.
- 3.** Presentation of Feasibility Studies for Hills of Town Creek Section Five and Porter Farms single-family residential developments.
- 4.** Consideration and possible action regarding a Preliminary Report and calling Public Hearings for a rezoning request from B—Commercial to R1—Single-Family Residential for Hills of Town Creek Section Five.
- 5.** Consideration and possible action regarding a Preliminary Report and calling Public Hearings for a rezoning request from R1—Single-Family Residential to B—Commercial for 14855 N. Liberty Street, Montgomery, Texas.
- 6.** Presentation of a proposed business plan for The Caroline House Bed & Breakfast located at 811 College Street as submitted by DH BROW, LLC.

**COMMISSION INQUIRY:**

Pursuant to Texas Government Code Sect. 551.042 the Planning & Zoning Commission may inquire about a subject not specifically listed on this Agenda. Responses are limited to recitation of existing policy or a statement of specific factual information given in response to the inquiry. Any deliberation or decision shall be limited to a proposal to place on the agenda of a future meeting.

**EXECUTIVE SESSION:**

The Planning and Zoning Commission reserves the right to discuss any of the items listed specifically under this heading or for any items listed above in executive closed session as permitted by law including if they meet the qualifications in Sections 551.071(consultation with attorney), 551.072 (deliberation regarding real property), 551.073 (deliberation regarding gifts), 551.074 (personnel matters), 551.076 (deliberation regarding security devices), and 551.087 (deliberation regarding economic development negotiations) of Chapter 551 of the Government Code of the State of Texas.

**ADJOURNMENT**

/s/ Dave McCorquodale

Dave McCorquodale, Asst. City Administrator

I certify that the attached notice of meeting was posted on the bulletin board at City of Montgomery City Hall, 101 Old Plantersville Road, Montgomery, Texas, on December 3, 2021 at 4:50 p.m. I further certify that the following news media was notified of this meeting as stated above: The Courier

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*This facility is wheelchair accessible and accessible parking spaces are available. Please contact the City Secretary's office at 936-597-6434 for further information or for special accommodations.*

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**MINUTES OF REGULAR MEETING**

**September 7, 2021**

**MONTGOMERY PLANNING AND ZONING COMMISSION**

**CALL TO ORDER**

Chairman Waddell declared a quorum was present and called the meeting to order at 6:16 p.m.

Present: Jeffrey Waddell, Britnee Ghutzman, Bill Simpson, Merriam Walker

Absent: Allyson Clark

Also Present: Dave McCorquodale, Assistant City Admin. / Director of Planning & Development

**VISITOR/CITIZENS FORUM**

Mr. Bill Ellison, CEO and founder of ASGI Homes, introduced himself and noted his company builds affordable housing in Montgomery and the surrounding counties. He stated his home product is targeted at sub-\$200K homes in under-utilized areas and properties. Staff noted that many of the City’s current development regulations do not always allow for an affordable home product. An example would be the City’s 9,000 square foot minimum lot size increasing the cost of a home by requiring larger homesites. Mr. Ellison noted he does not currently have any affordable projects in the City but is currently building a custom home in Waterstone in the City. The Commission noted the benefit of affordable housing to the community and discussed some of the challenges when investors purchase multiple homes to use as rental properties.

**1. Consideration and possible action regarding special meeting minutes of July 20, 2021.**

Bill Simpson moved to approve the minutes as presented. Britnee Ghutzman seconded the motion, the motion carried unanimously. (4-0)

**2. Consideration and possible action regarding repainting the exterior doors of 14356 Liberty Street in the Historic Preservation District as submitted by Kambra Drummond, owner of Rustic Cashmere Gifts & Antiques.**

Staff introduced the item and noted Mrs. Drummond could not attend the meeting due to a family illness.

Britnee Ghutzman moved to approve the requested change as submitted. Merriam seconded the motion, which carried unanimously. (4-0)

**3. Consideration and possible action regarding replacing the ad copy of the sign at 301 Prairie Street in the Historic Preservation District as submitted by Kimberly Baird, owner of Montgomery Quilt Company.**

Staff introduced the item and noted Mrs. Baird was in attendance. Staff also noted that this item does not require a City permit since the sign structure is existing and City Code allows for replacement of the advertising copy of a sign. The P&Z is reviewing the sign since the property is within the Historic Preservation District.

Merriam Walker moved to approve the sign as presented. Britnee Ghutzman seconded the motion, the motion carried unanimously. (4-0)

**4. Presentation on proposed attic office conversion project for 208 McCown Street in the Historic Preservation District as submitted by owner James Burns.**

Staff introduced the item and noted Mr. Burns was in attendance to review the item. He explained he and his wife recently purchased the building and would like to expand the available space in the building by adding a partial second story to the building and converting the attic to office space. Mr. Burns provided several conceptual images of the proposed skylights and upper windows that would be added to the roof. The Commission was generally agreeable to the project and appreciated the images to help visualize what the 2<sup>nd</sup> floor addition would look like. No formal action was taken and the Commission thanked Mr. Burns for attending the meeting.

**5. Consideration and possible action on proposed home renovations for 825 College Street in the Historic Preservation District as submitted by owner Justin Elliott.**

Staff introduced the item and noted Mr. Elliot was present to answer questions. The Commission asked Mr. Elliot for details about the project and history of the property. Mr. Elliot stated he thought the home was built in 1930 and stated that the updated building materials would help with home maintenance and upkeep.



Bill Simpson moved to approve the proposed home renovations as presented. Britnee Ghutzman seconded the motion, the motion carried unanimously. (4-0)

**6. Presentation on relocating an historic home to The Oaks of Montgomery property located at 202 Prairie Street in the Historic Preservation District.**

Staff introduced the item and provided background on Mr. Marks' Planned Development District for his property, The Oaks of Montgomery. Mr. Marks approached the City and said he has an opportunity to acquire an historic home with ties to the City and relocate the home to his property on Prairie Street. Staff provided the Commission the details provided by Mr. Marks to the City on the history of the home. Staff stated the owner was looking to the City or the MEDC for financial assistance in relocating the home. Staff wanted to provide the Commission with the information in the event the project moves forward and an amendment to the Planned Development Agreement was needed. No formal action was taken.

**7. Consideration and possible action regarding the November 2, 2021 Planning & Zoning Commission Regular Meeting.**

Staff introduced the item and noted Election Day falls on the same day as the P&Z meeting and city hall would be used as a voting location. The Commission could schedule the November meeting for an alternate location like the Community Building or cancel the meeting and call a special meeting if the need arises.

Merriam Walker moved to cancel the regular November meeting and call a special meeting if one was needed. Britnee Ghutzman seconded the motion, the motion carried unanimously. (4-0)

**Commission Inquiry**

None.

**Adjournment**

Merriam Walker moved to adjourn the meeting at 7:25 p.m. Britnee Ghutzman seconded the motion, the motion carried unanimously. (4-0)

Prepared by: \_\_\_\_\_ Date approved: \_\_\_\_\_  
Dave McCorquodale

\_\_\_\_\_  
Chairman Jeffrey Waddell

Attest: \_\_\_\_\_  
Susan Hensley, City Secretary

**MINUTES OF REGULAR MEETING**

**October 5, 2021**

**MONTGOMERY PLANNING AND ZONING COMMISSION**

**CALL TO ORDER**

Chairman Waddell declared a quorum was present and called the meeting to order at 6:01 p.m.

Present: Jeffrey Waddell, Britnee Ghutzman, Bill Simpson

Absent: Merriam Walker, Allyson Clark

Also Present: Dave McCorquodale, Assistant City Admin. / Director of Planning & Development

Richard Tramm, City Administrator

Chris Roznovsky, PE, Engineer for the City

**VISITOR/CITIZENS FORUM**

No comments were given.

**1. Discussion regarding Historic Preservation District Ordinance and Design Guidelines.**

City staff provided information on the regulations for the Historic Preservation District and asked for input on ways to improve regulations if the Commission felt certain areas needed attention. Staff stated that currently the regulations are focused on regulating architectural form and site development in the District. Current regulations for the Historic Preservation District do not cover more decorative items like holiday lighting and outdoor merchandise displays. Staff asked if the Commission saw benefit to regulating items like holiday lighting. The Commission felt that preventing extremes was important but did not feel like regulating things like placement of holiday lighting was warranted. Ensuring public walkways are kept clear of merchandise displays and obstructions where applicable was also noted as important. Discussion was held on the progress of the MEDC’s Downtown Design Plan and how it aligns with goals of the City’s Comprehensive Plan. The Commission felt it was important to balance the important task of protecting the visual continuity of downtown without over-regulating property owners. Ensuring the regulations are able to be effectively and evenly applied was identified as an important point that can foster civic pride among downtown business and property owners. No formal action was taken.

**2. Staff Presentation on Municipal Utility Districts.**

Staff based a condensed presentation on the basics of MUD’s given to City Council by the Redbird Meadows development team on September 28, 2021. The presentation included the basic functions and responsibilities of MUD’s and how they are used in the development process. No formal action was taken.

**3. Update on the proposed 389-ac Redbird Meadow Development (previously referred to as the “Kammerer Tract”).**

The city engineer reviewed information from project and provided an update on the timeline of the project that was provided by the developer and noted his office was waiting on revised plans from the developer. Mr. Roznovsky also discussed the potential transportation impacts of the development and what adjustments would be needed to align with the City’s Thoroughfare Plan. No formal action was taken.

**Commission Inquiry**

None.

**Adjournment**

Britnee Ghutzman moved to adjourn the meeting at 7:13 p.m. Bill Simpson seconded the motion, the motion carried unanimously. (3-0)

Prepared by: \_\_\_\_\_ Date approved: \_\_\_\_\_  
Dave McCorquodale

\_\_\_\_\_  
Chairman Jeffrey Waddell

Attest: \_\_\_\_\_  
Susan Hensley, City Secretary

Montgomery Planning and Zoning Commission  
**AGENDA REPORT**

<b>Meeting Date:</b> 12/07/2021	<b>Budgeted Amount:</b>
<b>Department:</b> Administration	<b>Prepared By:</b> Dave McCorquodale

**Subject**

Consideration and possible action regarding election of officers.

**Recommendation**

Nominate and elect a Chairperson and Vice-Chairperson and other officers as you see fit.

**Discussion**

This is done annually following appointment or reappointment of members to the P&Z Commission. Selecting the Chairperson and Vice-Chairperson allows for someone to preside over meetings and someone to serve as an alternate if the Chairperson cannot attend the meeting.

Jeff Waddell and Britnee Ghutzman currently serve as Chairman and Vice-Chairman, respectively. Any member is eligible to serve in these roles including those currently serving. City staff carries out the duties of Secretary by keeping minutes and preparing reports and recommendations to City Council. Should the Commission decide to appoint a Secretary (or other officers), the duties of the position would remain the responsibility of City staff.

**Approved By**

Asst. City Administrator	Dave McCorquodale	Date: 11/28/2021
City Administrator	Richard Tramm	Date: 11/28/2021

Montgomery Planning and Zoning Commission  
**AGENDA REPORT**

<b>Meeting Date:</b> 12/07/2021	<b>Budgeted Amount:</b>
<b>Department:</b> Administration	<b>Prepared By:</b> Dave McCorquodale

**Subject**

Presentation of Feasibility Studies for Hills of Town Creek Section Five and Porter Farms single-family residential developments.

**Recommendation**

Listen to the presentations and discuss comments and questions.

**Discussion**

When new developments are proposed in the City, the developer funds a Feasibility Study conducted by the City Engineer to identify the impacts on City infrastructure, drainage, traffic considerations, etc., and establishes various costs to be borne by the developer. The City Council authorizes and reviews these studies, and discussions between the City Engineer and staff led to the idea of presenting these studies to the P&Z as well. Reviewing these Feasibility Studies will familiarize P&Z with upcoming developments and provide background information for future development steps like platting and construction plan approvals.

**Approved By**

Asst. City Administrator	Dave McCorquodale	Date: 12/02/2021
City Administrator	Richard Tramm	Date: 12/02/2021

**HILLS OF TOWN CREEK SECTION 5  
FEASIBILITY STUDY  
(Dev. No. 2102)**

**FOR**

**THE CITY OF MONTGOMERY**

**WGA PROJECT NO. 00574-107**

**OCTOBER 2021**

**PREPARED BY**

**WGA**

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CONSULTING ENGINEERS

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## OVERVIEW

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- 1 Executive Summary
- 2 Introduction
- 3 Analysis

**Exhibits:**

- A: Overall Exhibit – Boundary, Zoning & Thoroughfare
- B: Preliminary Site Plan
- C: Updated Development Acreages & Service Demands
- D: Excerpt From Impact Fee Analysis
- E: Escrow Calculation



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## 1 EXECUTIVE SUMMARY

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Chris Cheatham of Cheatham Management (the “Developer”) has requested the City of Montgomery (the “City”) to perform a feasibility study for the City to serve future single-family development on a 16.45-acre tract north of SH-105 and east of Lone Star Parkway (the “Tract”). The Tract is located entirely within the City’s boundary and will not require annexation to provide service.

This development would consist of seventy-two single family tracts. The analysis shows that the City will have the wastewater capacity to serve the development, and existing developments, for the next few years but will need additional wastewater treatment plant capacity to serve all existing and proposed developments at full build out.

The analysis also shows that after the completion of the City’s Water Plant No. 3 Improvements project currently in construction the City will have the water capacity to serve the development, and existing developments, for the next few years but will need additional water plant capacity to serve all existing and proposed developments at full build out.

The estimated total costs that will be associated with the development are:

• Escrow Account	\$ 48,000
• Water Impact Fee	\$ 81,000
• <u>Wastewater Impact Fee</u>	<u>\$ 181,000</u>
<b>Total Estimated Costs</b>	<b>\$ 310,000</b>

The Developer has estimated a total assessed valuation for the development to be approximately \$18,000,000 at full build out. Based on the City’s current tax rate (\$0.1412 debt service and \$0.2588 for operations and maintenance) financially, the development will bring in approximate tax revenues as shown below:

• Operations and Maintenance	\$ 44,300
• <u>Debt Service</u>	<u>\$ 24,100</u>
<b>Total Estimated Annual Tax Revenue</b>	<b>\$ 68,400</b>

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## 2 INTRODUCTION

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This undeveloped Tract is located within the City limits, north of SH-105 and east of Lone Star Parkway. The Tract will not require annexation into the City. An exhibit showing the Tract's boundary in relation to the City's boundary, as well as the Tract's existing zoning and relation to the City's most current thoroughfare plan is enclosed as **Exhibit A**. A preliminary site plan is enclosed as **Exhibit B** and indicates the Developer intends to subdivide the Tract into seventy-two 50' wide single-family lots. The tract is currently zoned as Commercial (B) and will need to be rezoned to Residential (R-1).

A preliminary land plan showing the proposed public utilities and paving is enclosed as **Exhibit B**. Based on information from the developer, construction of the development is planned to be complete in late 2022. The estimates included in this feasibility are based on the anticipated land use provided by the developer at the time of the study. The final land plan may affect the estimated costs and revenues associated with the development.

Based on the land plan provided by the Developer, the following variances to the City's current ordinances will need to be requested and considered. This is not an all-encompassing list and is subject to change based on the final land plan of the site:

- Lot Requirements
  - o The Development's proposed lot width is 50'. This is not in compliance with the City's 75' minimum requirement. (Sec. 98-122(b)(2))
  - o The Development's proposed lot depth is 100'. This is not in compliance with the City's 120' minimum requirement. (Sec. 98-122(b)(3))
  - o The Development's proposed lot area is 5,000 square feet (sf). This is not in compliance with the City's 9,000 sf minimum. (Sec. 98-122(b)(1))

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### 3 ANALYSIS

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#### **Water Production and Distribution**

The Tract is located within City limits and plans to receive service from the City. The City has three (3) active water wells and two existing water plants with a capacity of 568,000 gallons per day (“gpd”) per Texas Commission on Environmental Quality (“TCEQ”) requirements. The City is currently under construction of a water plant improvements project at the existing Water Plant No. 3 to increase the capacity of the City’s water system to 2,500 connections while holding the same average daily flow capacity.

The current average daily flow (“ADF”) in the City is approximately 365,000 gpd. Inclusive of existing connections, ultimate future projected connections within current platted developments, and developments that are currently in design, the City has committed approximately 632,100 gpd and 1,695 connections. A copy of the updated water usage projections is included as **Exhibit C**. Once the Water Plant No. 3 Improvements Project is complete, the City will have committed approximately 111% of the total ADF capacity and 68% of the connection capacity. The City is not expected to hit these numbers or exceed the current average daily flow capacity until beyond 2025.

Based on information from the Developer, the Tract’s estimated water capacity requirement is approximately 18,000 gpd. Inclusive of existing connections, platted developments, developments currently underway, other developments in feasibility, and this development, the City will have committed approximately 813,000 gpd or 143% of the total ADF capacity and 97% of the connection capacity. Based on the projections shown in Exhibit C, the City would need additional water plant capacity around 2024.

Upon completion of the proposed improvements and based on the projected ADF, including this Tract, the City is projected to have sufficient water production capacity to meet the demand of the development within the City for the next few years. As the existing and upcoming developments build out, the City should be prepared to expand their water production and distribution capacity.

The Developer will need to construct an extension to the existing 12-inch waterline along Emma’s Way, to Lone Star Parkway. Additionally, the Developer will be required to construct an additional 12-inch waterline from the proposed Water Plant No. 4 site, north through the Tract to the northern end of the Tract along Lone Star Parkway, as shown in **Exhibit A**. This waterline will facilitate the ability for the City to complete an additional waterline loop in the future. The Developer will be responsible for all costs associated with the waterline extension and required easements.

The ultimate alignment of waterlines interior to the Tract will depend on the final land plan of the proposed development. These waterlines will need to be placed in public utility easements located along the public ROW or placed within public ROW interior to the development and constructed per all applicable City and TCEQ design criteria. The developer is responsible for all costs associated with easement acquisition and recordation.

The Developer is responsible for providing engineered plans and specifications for the water distribution system interior to the development and the previously mentioned public 12-inch waterlines to the City

Engineer for review and approval prior to commencing construction, and to obtain all required Planning and Zoning Commission, City Council and development approvals and permits.

### **Sanitary Sewer Collection and Treatment**

The District's existing wastewater facilities include of 18 public lift stations and two (2) wastewater treatment plants (one of which is currently decommissioned). The Stewart Creek Wastewater Treatment Plant (TPDES Permit No. WQ0011521001) has a permitted capacity of 400,000 gpd. The current ADF at the Stewart Creek Wastewater Treatment Plant is 183,000 gpd or 46%.

Inclusive of existing connections, platted developments, and developments which are in design or under construction, the City has committed approximately 427,000 gpd or 107% of existing permitted capacity at full build out. A copy of the wastewater usage projections is included as **Exhibit C**.

Based on the City's historical usage for similar types of development and information from the Developer, the Tract's estimated sanitary sewer capacity requirement is approximately 14,400 gpd (432,000 gallons per month). Inclusive of existing connections, platted developments, developments currently underway, other developments in feasibility, and this development, the City will have committed approximately 572,000 gpd or 143% of existing permitted capacity.

The TCEQ requires the City to initiate design of a wastewater treatment capacity expansion when the ADF exceeds 75% of the City's 400,000 gpd permitted capacity for 3 consecutive months. The ADF for the City, including this Tract and other treats under design/feasibility, is not expected to exceed 75% of the permitted capacity (300,000 gpd) until around 2023. Additionally, the TCEQ requires the commencement of the construction phase of the expansion after 3 consecutive months of ADF exceeding 90% of the permitted capacity (360,000 gpd). This is expected to occur around 2024.

The Tract will be served by extending an 8-inch public sanitary sewer line from the existing 8-inch sanitary sewer line located along the western ROW of Emma's Way. The proposed sanitary sewer line will be extended north and west along the ROW of Emma's Way to the proposed entrance of the Development. The Developer will be responsible for delivery of sanitary sewer service from the Tract to this location by the means of a gravity sanitary sewer line, as shown in **Exhibit A**. The Developer will be responsible for all costs associated with this sanitary sewer line extension and required easements.

The ultimate alignment of sanitary sewer lines interior to the Tract will depend on the final land plan of the proposed development. These sanitary sewer lines will need to be placed within public utility easements located along the public ROW or placed within the public ROW interior to the development and constructed per all applicable City and TCEQ design criteria.

The Developer is responsible for providing engineering plans and specifications for the sanitary sewer conveyance system interior to the development to the City engineer for review and approval prior to commencing construction. The Developer is also responsible for obtaining all Planning and Zoning Commission, City Council, and development approvals and required permits. The Developer will need to coordinate the installation of sanitary sewer tap(s) into the public system with the City's department of Public Works and will be responsible for all costs associated with said work.

## **Drainage**

The onsite storm sewer system will be designated public and accepted by the City upon completion of the development. All drainage and detention improvements must be designed per the city's Code of Ordinances requiring compliance with the City's floodplain regulations and all applicable Montgomery County Drainage Criteria Manual Standards. Failure to design and construct the drainage facilities per Montgomery County Criteria potentially jeopardizes eligibility for acceptance by the City. The Developer will also be required to perform and submit a drainage study showing the development's impact on the drainage downstream of the Tract and on adjacent properties. The drainage study must be submitted to the City for review and approval prior to approval of the construction plans.

The Developer is responsible for providing engineering plans and specifications for the drainage and detention system interior to the development to the City engineer for review and approval prior to commencing construction, and to obtain all required Planning and Zoning Commission, City Council, and development approvals and permits.

## **Paving and Traffic**

Per the preliminary land plan submitted by the Developer, Emma's Way is proposed to be extended through the development and connect to Lone Star Parkway within a proposed 80-foot ROW. Additionally, there is an unnamed minor residential street with a proposed 50-foot ROW to serve the proposed lots. The Emma's Way extension and the unnamed street are proposed to be public and accepted by the City. The Developer is responsible for providing engineered plans and specifications for the roads interior to the development to the City Engineer for review and approval prior to commencing construction, and to obtain all required Planning and Zoning Commission, City Council, and development approvals and permits.

Currently, the preliminary land, combined with existing infrastructure, provides for two (2) points of access for the seventy-two-lot development from Emma's Way from SH 105 (existing) and Lone Star Parkway (proposed). Per the City's most recent thoroughfare plan, two proposed major collector roads are proposed to run through the Tract, as shown on **Exhibit A**. The Developer will need to coordinate with the City and Montgomery County to confirm that the needs of the thoroughfare plan will be met with the Development.

## **Development Costs**

The Developer will need to engineer and construct the on-site and off-site water, sanitary sewer, paving, and drainage facilities to serve the proposed tract.

The Developer will also need to pay water and wastewater impact fees to the City. The impact fees will be assessed at the time of recordation of the final plat and collected prior to receiving water and sanitary sewer taps. Enclosed as **Exhibit D** is Table 1.1 of the 2017 Revisions to the Montgomery Impact Fee analysis Report. The estimated ADF provided by the developer requires the equivalent use of 72 5/8-inch water meters per the table.

An escrow agreement has been entered into between the Developer and the City and funds have been deposited to cover the cost of this feasibility study. An estimated additional \$48,000 will be required to cover the City's remaining expenses for the development, which includes administrative costs, legal fees,

plan reviews, developer and construction coordination, construction inspection, and one-year warranty expenses. The fees calculation can be seen in **Exhibit E**. These additional funds must be deposited into the escrow prior to any work being completed by the City.

Below is a summary of the estimated costs associated with the development:

**Estimated Costs:**

- Escrow Account	\$ 48,000
- Water Impact Fee	\$ 81,000
- Wastewater Impact Fee	<u>\$181,000</u>
<b>Total</b>	<b>\$310,000</b>

These estimates are based on the projected water and wastewater usage provided by the developer. The actual costs will depend on the final land plan, final design, and actual construction costs.

**Financial Feasibility**

The Developer projects the home sale prices to be \$250,000. The Developer estimates the total assessed value (A.V.) at full development to be approximately \$18,000,000. Based on the estimated total A.V. and assuming 95% collection, the development would generate approximately \$24,100 per year in debt service revenue based on the City’s \$0.1412/\$100 valuation debt service tax rate, and approximately \$44,300 per year in operations and maintenance revenue based on the City’s \$0.2588/\$100 valuation Operations & Maintenance (O&M) tax rate.

This report is our engineering evaluation of the funds required to complete the anticipated future capital improvement for this Tract and of the potential increase in tax revenue to the City. This report is not intended to be used for the issuance of municipal financial products or the issuance of municipal securities. The City’s Financial Advisor(s) can address potential recommendations related to the issuance of municipal financial products and securities.

Thank you for the opportunity to complete this feasibility study and offer our recommendations. Please contact me or Ms. Katherine Vu should you have any questions.



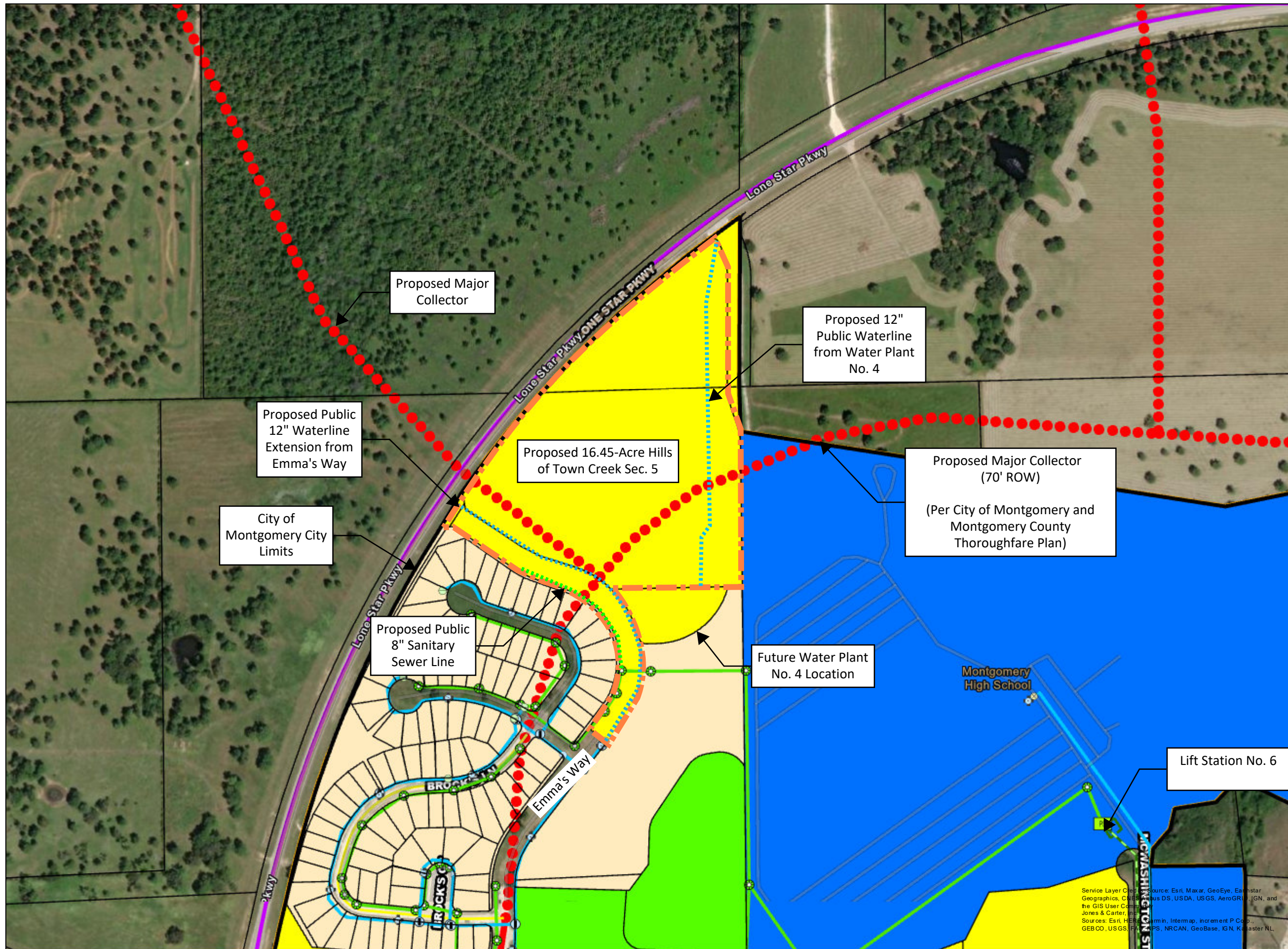
Sincerely,

Chris Roznovsky, PE  
Engineer for the City

CVR/ser

Z:\00574 (City of Montgomery)\107 Hills of Town Creek Sec. 5\Feasibility Study\Reports\HOTC Sec 5 Feasibility Study.docx





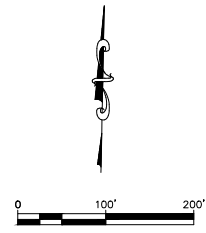
**LEGEND**

- Commercial (B)
- Multi-Family (R-2)
- Institutional (I)
- Residential (R-1)
- Existing Sanitary Sewer Line
- Proposed Sanitary Sewer Line
- Existing Water Main
- Proposed Water Main

Service Layer Credits: Source: Esri, Maxar, GeoEye, Earthstar Geographics, CNES/Airbus DS, USDA, USGS, AeroGRID, IGN, and the GIS User Community  
 Jones & Carter, Inc.  
 Sources: Esri, HERE, DeLorme, Intermap, increment P Corp., GEBCO, USGS, FAO, Swisstopo, NRCAN, GeoBase, IGN, Kartaster NL



S:\ENGINEERING PROJECTS\10600 - HILLS OF TOWN CREEK SECTION 4\03 CAD\DESIGN SET\NEW SECTION-EXHIBIT.DWG Mar. 19, 2021-8:39 AM



±0.13 AC. LOTS  
 TOTAL 72 LOTS  
 16.45 ACRE SITE  
 ±3,500 LF PAVEMENT



**L SQUARED ENGINEERING**  
 MUNICIPAL COMMERCIAL RESIDENTIAL  
 WWW.LSENGINEERING.COM  
 MAIN OFFICE  
 3807 W. DAVIS STREET #1000  
 CONROE, TEXAS 77384  
 OFFICE 281-447-0420  
 21123 EVA STREET #200  
 MONTGOMERY, TEXAS 77134

**HILLS OF TOWN CREEK**  
 NEW SITE EXHIBIT

3/19/2021

DRAWING INFORMATION			
PROJECT	10600	TDLR	**
DRAWN	MCV	CHECKED	JTW
SCALE	1" = 100' (24x36)	SHEET	1
	1" = 200' (11x17)		

THIS DOCUMENT IS RELEASED FOR THE PURPOSE OF INTERIM REVIEW UNDER THE AUTHORITY OF:  
 E. LEVI LOVE, PE #99340  
 OR  
 JONATHAN WHITE, PE #127058  
 FOR REVIEW PURPOSES ONLY  
 NOT FOR CONSTRUCTION





	Development Info & Capacities						2021			2022			2023			2024			2025				
	Current Connections	Ultimate Connections	Water		Wastewater		Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary		
			Current Actual	Ultimate	Current	Ultimate																	
<b>Commercial Platted and Existing (cont.)</b>																							
Waterstone Commercial Reserve B	1	1	360	4,300	234	2,795																	
Waterstone Commercial Reserve C (State Farm)	1	1	405	405	263	263																	
Waterstone Commercial Reserve D	-	1	-	4,000	-	2,600																	
Town Creek Crossing Commercial Reserves	-	6	-	7,000	-	4,550			1	1,167	758												
Depado Estates	-	5	-	10,000	-	6,500																	
The Montgomery Shoppes	-	6	-	15,000	-	9,750			2	5,000	3,250	2	4,000	3,000	2	4,000	3,000	2	4,000	3,000	2	4,000	3,000
Retail Center	1	1	-	3,000	-	1,950																	
Chick Fil A	1	1	3,200	3,200	2,080	2,080																	
Panda Express	1	1	1,400	1,400	910	910																	
CVS	1	1	225	225	146	146																	
Starbucks	1	1	1,000	1,000	650	650																	
Burger Fresh	1	1	240	240	156	156																	
Churches	12	12	3,000	3,000	1,950	1,950																	
Miscellaneous Commercial	79	79	28,000	28,000	18,200	18,200																	
<b>Subtotal</b>	<b>134</b>	<b>187</b>	<b>96,025</b>	<b>247,475</b>	<b>62,416</b>	<b>160,859</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>12</b>	<b>35,031</b>	<b>22,770</b>	<b>8</b>	<b>28,800</b>	<b>22,225</b>	<b>6</b>	<b>17,067</b>	<b>12,668</b>	<b>5</b>	<b>14,000</b>	<b>10,675</b>		
<b>Multi Family</b>																							
Heritage Plaza (Units)	208	208	21,000	24,000	13,650	15,600																	
Town Creek Village, Phase I (Units)	152	152	24,000	26,500	12,000	13,250																	
Plez Morgan Townhomes	-	48	-	12,000	-	6,000	48	12,000	6,000														
Montgomery Supported Housing	14	14	2,300	2,300	1,150	1,150																	
Live Oak Assisted Living	1	1	2,300	2,300	1,150	1,150																	
<b>Subtotal</b>	<b>375</b>	<b>423</b>	<b>49,600</b>	<b>67,100</b>	<b>27,950</b>	<b>37,150</b>	<b>48</b>	<b>12,000</b>	<b>6,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		
<b>Institutional (Schools)</b>																							
MISD Athletic Complex	2	2	6,800	6,800	3,400	3,400																	
MISD High School Complex	2	2	29,000	29,000	14,500	14,500																	
MISD Warehouse (105/Clepper)	1	1	360	1,500	250	750																	
Bus Barn	1	1	530	530	265	265																	
MISD School (MLK)	2	2	1,600	1,600	800	800																	
MISD School (149)	1	1	2,800	2,800	1,400	1,400																	
<b>Subtotal</b>	<b>9</b>	<b>9</b>	<b>41,090</b>	<b>42,230</b>	<b>20,615</b>	<b>21,115</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		
<b>Irrigation</b>																							
Single Family Residential	61	100	16,165	26,500	-	-																	
Commercial Irrigation	31	70	9,300	21,000	-	-																	
Christian Brothers	1	1	1,100	1,100	-	-																	
Chick Fil A	1	1	1,600	1,600	-	-																	
BlueWave	1	1	500	500	-	-																	
CVS	1	1	1,200	1,200	-	-																	
Church	2	2	530	530	-	-																	
City	9	9	4,500	4,500	-	-																	
<b>Subtotal</b>	<b>107</b>	<b>185</b>	<b>34,895</b>	<b>56,930</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		
<b>Committed (W/O Irrigation)</b>	<b>1,268</b>	<b>1,695</b>	<b>365,985</b>	<b>632,085</b>	<b>223,321</b>	<b>426,764</b>	<b>60</b>	<b>14,910</b>	<b>8,100</b>	<b>94</b>	<b>57,111</b>	<b>37,620</b>	<b>71</b>	<b>46,205</b>	<b>33,525</b>	<b>46</b>	<b>27,767</b>	<b>19,218</b>	<b>24</b>	<b>18,465</b>	<b>13,075</b>		
<b>Total Projected Committed Volumes:</b>																							
			<b>2021</b>			<b>2022</b>			<b>2023</b>			<b>2024</b>			<b>2025</b>								
			<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>			
			<b>1,328</b>	<b>380,895</b>	<b>231,421</b>	<b>1,422</b>	<b>438,006</b>	<b>269,041</b>	<b>1,493</b>	<b>484,211</b>	<b>302,566</b>	<b>1,539</b>	<b>511,977</b>	<b>321,784</b>	<b>1,563</b>	<b>530,442</b>	<b>334,859</b>						
<b>Future Development in Feasibility/Design</b>																							
Red Bird Meadows	-	556	-	139,000	-	111,200						90	22,500	18,000	90	22,500	18,000	90	22,500	18,000			
Hills of Town Creek Section 5	-	72	-	18,000	-	14,400	10	2,500	2,000	20	5,000	4,000	20	5,000	4,000	22	5,500	4,400	22	5,500	4,400		
Porter Farms Tract	-	98	-	24,500	-	19,600	8	2,000	1,600	30	7,500	6,000	30	7,500	6,000	30	7,500	6,000	30	7,500	6,000		
<b>Subtotal</b>	<b>-</b>	<b>726</b>	<b>-</b>	<b>181,500</b>	<b>-</b>	<b>145,200</b>	<b>18</b>	<b>4,500</b>	<b>3,600</b>	<b>140</b>	<b>35,000</b>	<b>28,000</b>	<b>140</b>	<b>35,000</b>	<b>28,000</b>	<b>142</b>	<b>35,500</b>	<b>28,400</b>	<b>142</b>	<b>35,500</b>	<b>28,400</b>		
<b>Committed Plus Feasibility</b>	<b>1,268</b>	<b>2,421</b>	<b>365,985</b>	<b>813,585</b>	<b>223,321</b>	<b>571,964</b>	<b>2021</b>			<b>2022</b>			<b>2023</b>			<b>2024</b>			<b>2025</b>				
			<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>			
			<b>1,328</b>	<b>380,895</b>	<b>231,421</b>	<b>1,440</b>	<b>442,506</b>	<b>272,641</b>	<b>1,651</b>	<b>523,711</b>	<b>334,166</b>	<b>1,837</b>	<b>586,477</b>	<b>381,384</b>	<b>2,003</b>	<b>640,442</b>	<b>422,859</b>						

	Development Info & Capacities																				
	Current Connections	Ultimate Connections	Water		Wastewater		2021			2022			2023			2024			2025		
			Current Actual	Ultimate	Current	Ultimate	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary
<b>Potential Future Development (Within Current City Limits)</b>																					
HEB Tract (HEB store only)	-	1	-	10,000	-	6,500							1	10,000	6,500						
HEB Tract (pad sites only)	-	5	-	15,000	-	9,750							1	3,000	2,100						
Summit Business Park, Phase 2	-	6	-	4,400	-	2,860							2	1,467	953						
Moon Over Montgomery	-	15	-	3,750	-	2,438										15	3,750	2,438			
Waterstone, Section 3	-	36	-	9,000	-	5,850							10	2,500	2,000	10	2,500	2,000	10	2,500	2,000
Waterstone, Section 4	-	80	-	20,000	-	13,000							10	2,500	2,000	10	2,500	2,000	10	2,500	2,000
J. Allen Kent	-	150	-	37,500	-	30,000							20	5,000	4,000	20	5,000	4,000	20	5,000	4,000
Town Creek Crossing Section 2	-	37	-	9,250	-	7,400							15	3,750	3,000	15	3,750	3,000	7	1,750	1,400
1097 Misc. Commercial	-	10	-	15,000	-	9,750				1	1,500	975		1	1,500	1,250		1	1,500	1,250	
Misc. Undeveloped (Commercial)	-	1,354	-	487,440	-	316,836				2	720	468		2	3,000	2,500		2	3,000	2,500	
Misc. Undeveloped (Single Family)	-	1,641	-	410,250	-	266,663				10	2,500	1,625		10	2,500	2,000		10	2,500	2,000	
Misc. Undeveloped (Industrial)	-	1	-	5,000	-	3,250															
Peter Hill 5.7 Acre Feasibility	-	5	-	5,000	-	3,250				2	2,000	1,300									
The Woods of Town Creek	-	212	-	53,000	-	42,400								30	7,500	6,000		30	7,500	6,000	
<b>Subtotal</b>	<b>-</b>	<b>3,553</b>	<b>-</b>	<b>1,084,590</b>	<b>-</b>	<b>719,946</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>18</b>	<b>11,187</b>	<b>7,271</b>	<b>102</b>	<b>42,717</b>	<b>32,303</b>	<b>114</b>	<b>35,000</b>	<b>27,288</b>	<b>91</b>	<b>29,250</b>	<b>23,250</b>
<b>Potential Future Development (ETJ)</b>																					
80-Ac Mabry Single Family	-	368	-	92,000	-	59,800							30	7,050	4,500	30	7,050	4,500	30	7,050	4,500
Stewart Landing	-	50	-	18,000	-	11,700							10	2,350	1,500	10	2,350	1,500	10	2,350	1,500
Misc. Undeveloped (Single Family)	-	6,595	-	1,648,750	-	1,071,688							10	2,350	1,500	10	2,350	1,500	10	2,350	1,500
Misc. Undeveloped (Commercial)	-	1,100	-	396,000	-	257,400				5	1,800	1,170		5	7,500	6,250		5	7,500	6,250	
<b>Subtotal</b>	<b>-</b>	<b>8,113</b>	<b>-</b>	<b>2,154,750</b>	<b>-</b>	<b>1,400,588</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>5</b>	<b>1,800</b>	<b>1,170</b>	<b>55</b>	<b>19,250</b>	<b>13,750</b>	<b>55</b>	<b>19,250</b>	<b>13,750</b>	<b>55</b>	<b>19,250</b>	<b>13,750</b>
<b>Potential Ultimate Totals</b>	<b>1,268</b>	<b>14,087</b>	<b>365,985</b>	<b>4,052,925</b>	<b>223,321</b>	<b>2,692,497</b>	<b>2021</b>			<b>2022</b>			<b>2023</b>			<b>2024</b>			<b>2025</b>		
							<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>
							<b>1,328</b>	<b>380,895</b>	<b>231,421</b>	<b>1,463</b>	<b>455,492</b>	<b>281,082</b>	<b>1,831</b>	<b>598,664</b>	<b>388,661</b>	<b>2,186</b>	<b>715,681</b>	<b>476,917</b>	<b>2,498</b>	<b>818,146</b>	<b>555,392</b>
							<b>Total Potential Ultimate</b>														

**Table 1.1 September 2017 ESFC Table for Commonly Used Meters**

<b>Meter Size</b>	<b>Maximum Continuous Operating Capacity (GPM)</b>	<b>Equivalent Single Family Home (ESFC)</b>	<b>Maximum Assessable Water Fee (\$)</b>	<b>Maximum Assessable Waste Water Fee (\$)</b>	<b>Maximum Assessable Fee (\$)</b>
5/8"	15	1.00	1,126	\$2,513	\$3,639
3/4"	25	1.67	1,881	\$4,198	\$6,079
1"	40	2.67	3,001	\$6,711	\$9,712
1 1/2"	120	8.00	9,006	\$20,103	\$29,112
2"	170	11.33	12,755	\$28,471	\$41,226
3"	350	23.33	26,264	\$58,626	\$84,890
4"	600	40.00	44,942	\$100,517	\$145,429
6"	1,200	80.00	90,064	\$201,035	\$291,099
8"	1,800	120.00	135,096	\$301,552	\$436,648

**ESCROW AGREEMENT, SECTION 2.03 ATTACHMENT**

**BY AND BETWEEN**

**THE CITY OF MONTGOMERY, TEXAS,**

**AND**

**Ceetham Management**

**Dev. No. 2102**

THE STATE OF TEXAS                    ⊃

COUNTY OF MONTGOMERY            ⊃

As per section 2.03, the Feasibility Study completed an estimate of the additional escrow amount, which was determined for administration costs, legal fees, plan reviews, developer coordination, construction coordination, construction inspection, and warranty of services. The required additional amount is below:

Administration	\$ 3,000
City Attorney	\$ 3,000
City Engineer	\$ 42,000
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TOTAL	\$ 48,000

**PORTER FARMS FEASIBILITY STUDY  
(Dev. No. 2101)**

**FOR**

**THE CITY OF MONTGOMERY**

**WGA PROJECT NO. 00574-108**

**OCTOBER 2021**

**PREPARED BY**

**WGA**

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CONSULTING ENGINEERS

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## OVERVIEW

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- 1 Executive Summary
- 2 Introduction
- 3 Analysis

**Exhibits:**

- A: Overall Exhibit
- B: Preliminary Site Plan
- C: Updated Development Acreages & Service Demands
- D: Excerpt From Impact Fee Analysis
- E: Escrow Calculation

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## 1 EXECUTIVE SUMMARY

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Charles Von Schmidt of Waterstone Development Group (the “Developer”) has requested the City of Montgomery (the “City”) to perform a feasibility study for the City to serve future single-family development on a 26.07-acre tract north of FM 1097 and east of Liberty Street. The tract is partially located within the City limits and partially within the City’s extra territorial jurisdiction (“ETJ”) and will require annexation into the City limits prior to receiving service.

This development would consist of approximately ninety-eight single family tracts. The analysis shows that the City will have the wastewater capacity to serve the development, and existing developments, for the next few years but will need additional wastewater treatment plant capacity to serve all existing and proposed developments at full build out.

The analysis also shows that after the completion of the City’s Water Plant No. 3 Improvements project currently in construction the City will have the water capacity to serve the development, and existing developments, for the next few years but will need additional water plant capacity to serve all existing and proposed developments at full build out.

The estimated total costs that will be associated with the development are:

• Lift Station Improvements	\$ 150,000
• Escrow Account	\$ 62,000
• Water Impact Fee	\$ 110,400
• <u>Wastewater Impact Fee</u>	<u>\$ 246,300</u>
<b>Total Estimated Costs</b>	<b>\$ 568,700</b>

The Developer has estimated a total assessed valuation for the development to be approximately \$22,050,000 at full build out. Based on the City’s estimated current tax rate (\$0.1412 debt service and \$0.2588 for operations and maintenance) financially, the development will bring in approximate tax revenues as shown below:

• Operations and Maintenance	\$ 54,200
• <u>Debt Service</u>	<u>\$ 29,600</u>
<b>Total Estimated Annual Tax Revenue</b>	<b>\$ 83,800</b>



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## 2 INTRODUCTION

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This undeveloped Tract is located north of the FM 1097 and east of Liberty Street. The majority of the Tract is located within the City limits, but approximately 4.3-acres on the north side of the Tract is located within the City's ETJ. That portion of the Tract will require annexation into the City limits prior to receiving service. An exhibit showing the Tract's boundary in relation to the City's boundary, as well as the Tract's existing zoning and relation to the City's most currently adopted thoroughfare plan is enclosed as **Exhibit A**. A preliminary site plan is enclosed as **Exhibit B** and indicates the Developer intends to subdivide the Tract into approximately ninety-eight 50' wide single-family lots. Note the site plan shown on Exhibit B has more than 98 lots however, the Developer has advised that approximately a 15% reduction in lot count should be considered to anticipate changes for detention, etc. The portion of the land that is within the City limits is currently zoned as Residential (R-1) and will not need to be rezoned. The portion of the Tract within the City's ETJ will need to be annexed and zoned as Residential (R-1).

Based on information from the developer, construction of the development is planned to be complete in late 2022. The estimates included in this feasibility are based on the anticipated land use provided by the developer at the time of the study. The final land plan may affect the estimated costs and revenues associated with the development.

Based on the land plan and additional information provided by the Developer, the following variances to the City's current ordinances will need to be requested and considered. This is not an all-encompassing list and is subject to change based on the final land plan of the site:

- Lot Requirements
  - o The Development's proposed lot width is 50'. This is not in compliance with the City's 75' minimum requirement. (Sec. 98-122(b)(2))
  - o The Development's proposed lot depth is 100'. This is not in compliance with the City's 120' minimum requirement. (Sec. 98-122(b)(3))
  - o The Development's proposed lot area is 5,750 square feet (sf). This is not in compliance with the City's 9,000 sf minimum. (Sec. 98-122(b)(1))

The Development does not appear to have adequate green space/open space to meet the compensating green space requirement due to the reduction in lot size (Sec. 78-95). One alternative to consider in addition to providing green space is to coordinate with the City to install sidewalks along FM 149 to Homecoming Park to provide a designated safe walking path to Lincoln Elementary.

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### 3 ANALYSIS

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#### Water Production and Distribution

The majority of the Tract is located within City limits and plans to receive service from the City. The City has three (3) active water wells and two existing water plants with a capacity of 875 connections or 568,000 gallons per day per Texas Commission on Environmental Quality (“TCEQ”) requirements. The City is currently under construction of a water plant improvements project at the existing Water Plant No. 3 to increase the capacity of the City’s water system to 2,500 connections while holding the same average daily flow capacity.

The current average daily flow (“ADF”) in the City is approximately 365,000 gpd. Inclusive of existing connections, ultimate future projected connections within current platted developments, and developments that are currently in design, the City has committed approximately 632,100 gpd and 1,695 connections. A copy of the updated water usage projections is included as **Exhibit C**. Once the Water Plant No. 3 Improvements Project is complete, the City will have committed approximately 111% of the total ADF capacity and 68% of the connection capacity. The City is not expected to hit these numbers or exceed the current average daily flow capacity until beyond 2025.

Based on information from the Developer, the Tract’s estimated water capacity requirement is approximately 24,500 gpd. Inclusive of existing connections, platted developments, developments currently underway, other developments in feasibility, and this development, the City will have committed approximately 813,000 gpd or 143% of the total ADF capacity and 97% of the connection capacity. Based on the projections shown in Exhibit C, the City would need additional water plant capacity around 2024.

Upon completion of the proposed improvements and based on the projected ADF, including this Tract, the City is projected to have sufficient water production capacity to meet the demand of the development within the City for the next few years. As the existing and upcoming developments build out, the City should be prepared to expand their water production and distribution capacity.

The Tract will be served by an existing waterline located in the western Right-of-Way of Liberty Street. The existing waterline is 6-inch in diameter which is not sufficient to serve this development. The waterline will need to be upsized from FM 1097 to the tract’s northern boundary from a 6-inch to a 12-inch. Additionally, the development should extend an additional waterline to tie into the existing 12” waterline on FM 1097 to create an additional waterline loop, as shown on **Exhibit A**. The Developer will be responsible for all costs associated with the waterline extension/upsizing and required easements.

The ultimate alignment of waterlines interior to the Tract will depend on the final land plan of the proposed development. These waterlines will need to be placed in public utility easements located along the public ROW or placed within public ROW interior to the development and constructed per all applicable City and TCEQ design criteria. The developer is responsible for all costs associated with easement acquisitions and recordation.

The Developer is responsible for providing engineered plans and specifications for the water distribution system interior to the development and the public offsite waterlines to the City Engineer for review and approval prior to commencing construction, and to obtain all required Planning and Zoning Commission, City Council and development approvals and permits.

### **Sanitary Sewer Collection and Treatment**

The District's existing wastewater facilities include of 18 public lift stations and two (2) wastewater treatment plants (one of which is currently decommissioned). The Stewart Creek Wastewater Treatment Plant (TPDES Permit No. WQ0011521001) has a permitted capacity of 400,000 gpd. The current ADF at the Stewart Creek Wastewater Treatment Plant is 183,000 gpd or 46%.

Inclusive of existing connections, platted developments, and developments which are in design or under construction, the City has committed approximately 427,000 gpd or 107% of existing permitted capacity at full build out. A copy of the wastewater usage projections is included as **Exhibit C**.

Based on the City's historical usage for similar types of development and information from the Developer, the Tract's estimated sanitary sewer capacity requirement is approximately 19,600 gpd (588,000 gallons per month). Inclusive of existing connections, platted developments, developments currently underway, other developments in feasibility, and this development, the City will have committed approximately 572,000 gpd or 143% of existing permitted capacity.

The TCEQ requires the City to initiate design of a wastewater treatment capacity expansion when the ADF exceeds 75% of the City's 400,000 gpd permitted capacity for 3 consecutive months. The ADF for the City, including this Tract and other treats under design/feasibility, is not expected to exceed 75% of the permitted capacity (300,000 gpd) until around 2023. Additionally, the TCEQ requires the commencement of the construction phase of the expansion after 3 consecutive months of ADF exceeding 90% of the permitted capacity (360,000 gpd). This is expected to occur around 2024.

There is an existing public sanitary sewer line along the eastern right-of-way of FM 149. However, due to the topography of the tract, we recommend the Tract be served by extending an 8-inch public sanitary sewer line toward the southeastern portion of the Tract and connecting to the existing 12-inch sanitary sewer line south of FM 1097, as shown in **Exhibit A**. The Developer will be responsible for all costs associated with this sanitary sewer line extension and required easements.

The proposed sanitary sewer capacity of the Development will cause the City's Lift Station No. 10 to exceed capacity at full buildout and will need to be upsized from approximately 350 gpm to 550 gpm. The estimated preliminary cost for the improvements is approximately \$150,000. However, an additional inspection and analysis of Lift Station No. 10 will need to be performed to prepare a final estimated cost of improvements.

The Developer will be responsible for the costs associated with the improvements of this facility. The above-mentioned improvement is not necessary to be completed at the beginning of the development. Therefore, these improvements may be phased in over the course of development, at a rate and schedule to be established by the City Engineer.

The ultimate alignment of sanitary sewer lines interior to the Tract will depend on the final land plan of the

proposed development. These sanitary sewer lines will need to be placed within public utility easements located along the public ROW or placed within the public ROW interior to the development and constructed per all applicable City and TCEQ design criteria.

The Developer is responsible for providing engineering plans and specifications for the sanitary sewer conveyance system interior to the development to the City engineer for review and approval prior to commencing construction. The Developer is also responsible for obtaining all Planning and Zoning Commission, City Council, and development approvals and required permits. The Developer will need to coordinate the installation of sanitary sewer tap(s) into the public system with the City's department of Public Works and will be responsible for all costs associated with said work.

### **Drainage**

The onsite storm sewer system will be designated public and accepted by the City upon completion of the development. Any detention ponds will remain the responsibility of the Developer. All drainage and detention improvements must be designed per the city's Code of Ordinances requiring compliance with the City's floodplain regulations and all applicable Montgomery County Drainage Criteria Manual Standards. Failure to design and construct the drainage facilities per Montgomery County Criteria potentially jeopardizes eligibility for acceptance by the City. The Developer will also be required to perform and submit a drainage study showing the development's impact on the drainage downstream of the Tract and on adjacent properties. The drainage study must be submitted to the City for review and approval prior to approval of the construction plans.

The Developer is responsible for providing engineering plans and specifications for the drainage and detention system interior to the development to the City Engineer for review and approval prior to commencing construction, and to obtain all required Planning and Zoning Commission, City Council, and development approvals and permits.

### **Paving and Traffic**

Per the preliminary land plan submitted by the Developer, there is an unnamed public road with an unknown ROW that will connect to Liberty Street in two locations. There is a second road that follows the existing private Thomas Road and connects to FM 1097. The acceptance of the connection to Thomas Road will need to be coordinated with the City and the current landowner before it will be considered public. The Developer is responsible for providing engineered plans and specifications for the roads interior to the development to the City Engineer for review and approval prior to commencing construction, and to obtain all required Planning and Zoning Commission, City Council, and development approvals and permits.

Currently, the preliminary land, combined with existing infrastructure, provides for three (3) proposed points of access for the ninety-eight-lot development from the two unnamed Liberty Street connections and the unnamed Thomas Street connection. Per the Montgomery County's most recently adopted thoroughfare plan, there are no conflicts with the current land plan, as shown on **Exhibit A**.

## Development Costs

The Developer will need to engineer and construct the on-site and off-site water, sanitary sewer, paving, and drainage facilities to serve the proposed tract.

The Developer will also need to pay water and wastewater impact fees to the City. The impact fees will be assessed at the time of recordation of the final plat and collected prior to receiving water and sanitary sewer taps. Enclosed as **Exhibit D** is Table 1.1 of the 2017 Revisions to the Montgomery Impact Fee Analysis Report. The estimated ADF provided by the developer requires the equivalent use of ninety-eight 5/8-inch water meters per the table.

An escrow agreement has been entered into between the Developer and the City and funds have been deposited to cover the cost of this feasibility study. An estimated additional \$62,000 will be required to cover the City's remaining expenses for the development, which includes administrative costs, legal fees, plan reviews developer and construction coordination, construction inspection, and one year warranty expenses. The fees calculation can be seen in **Exhibit E**. These additional funds must be deposited into the escrow prior to any work being completed by the City.

Below is a summary of the estimated costs associated with the development:

### *Estimated Costs:*

- Lift Station Improvements	\$ 150,000
- Escrow Account	\$ 62,000
- Water Impact Fee	\$ 110,400
- Wastewater Impact Fee	<u>\$ 246,300</u>
<b>Total</b>	<b>\$ 568,700</b>

These estimates are based on the projected water and wastewater usage provided by the developer. The actual costs will depend on the final land plan, final design, and actual construction costs.

## Financial Feasibility

The Developer projects the home sale prices to be \$225,000. The Developer estimates the total assessed value (A.V.) at full development to be approximately \$22,050,000. Based on the estimated total A.V. and assuming 95% collection, the development would generate approximately \$29,600 per year in debt service revenue based on the City's \$0.1412/\$100 valuation debt service tax rate, and approximately \$54,200 per year in operations and maintenance revenue based on the City's \$0.2588/\$100 valuation Operations & Maintenance (O&M) tax rate.

This report is our engineering evaluation of the funds required to complete the anticipated future capital improvement for this Tract and of the potential increase in tax revenue to the City. This report is not intended to be used for the issuance of municipal financial products or the issuance of municipal securities. The City's Financial Advisor(s) can address potential recommendations related to the issuance of municipal financial products and securities.

Thank you for the opportunity to complete this feasibility study and offer our recommendations. Please contact me or Ms. Katherine Vu should you have any questions.



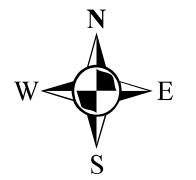
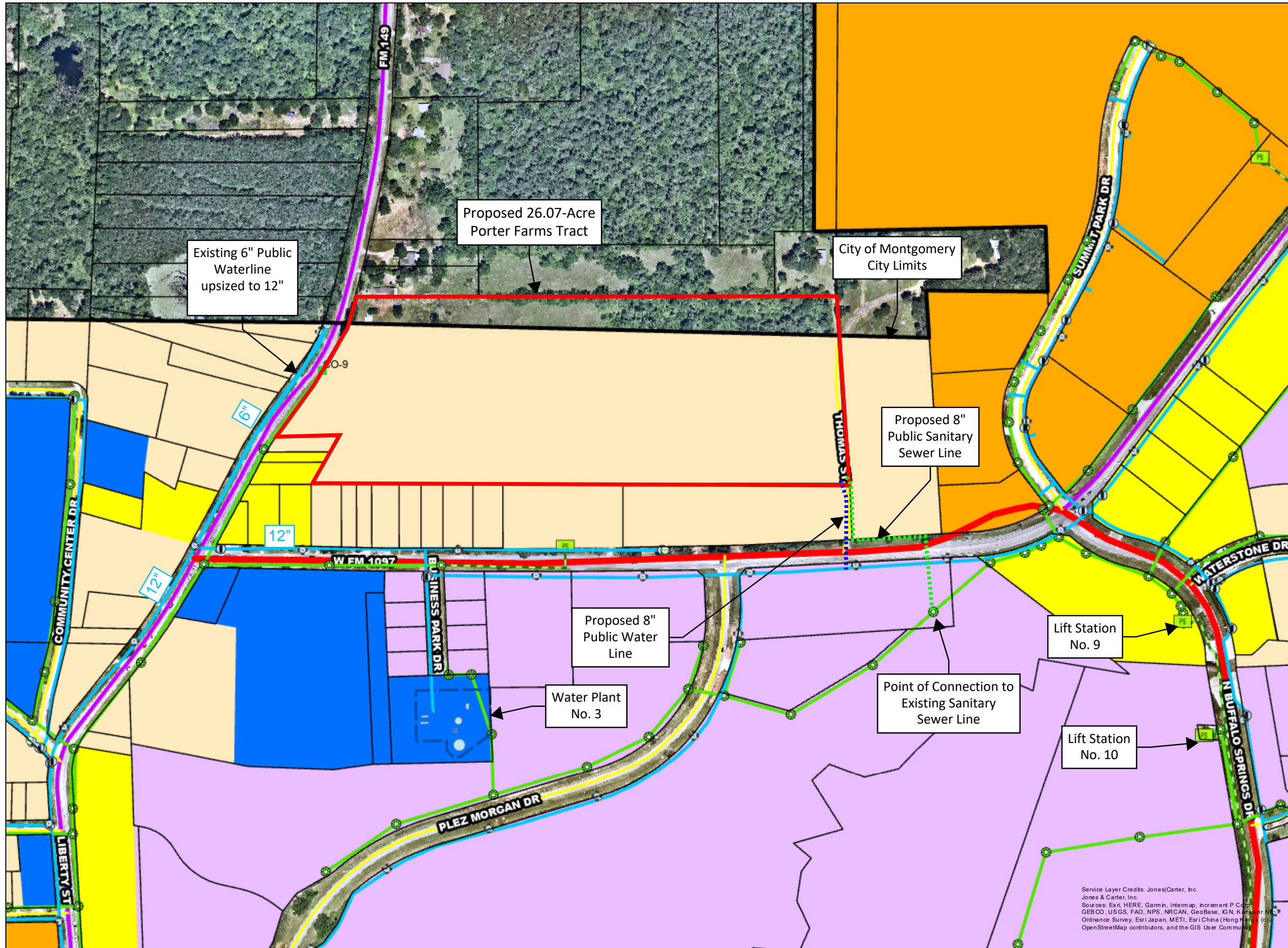
Sincerely,

Chris Roznovsky, PE  
Engineer for the City

CVR/ser

Z:\00574 (City of Montgomery)\108 Porter Farms Development\Feasibility Study\Report\Porter Farms Feasibility Study.docx



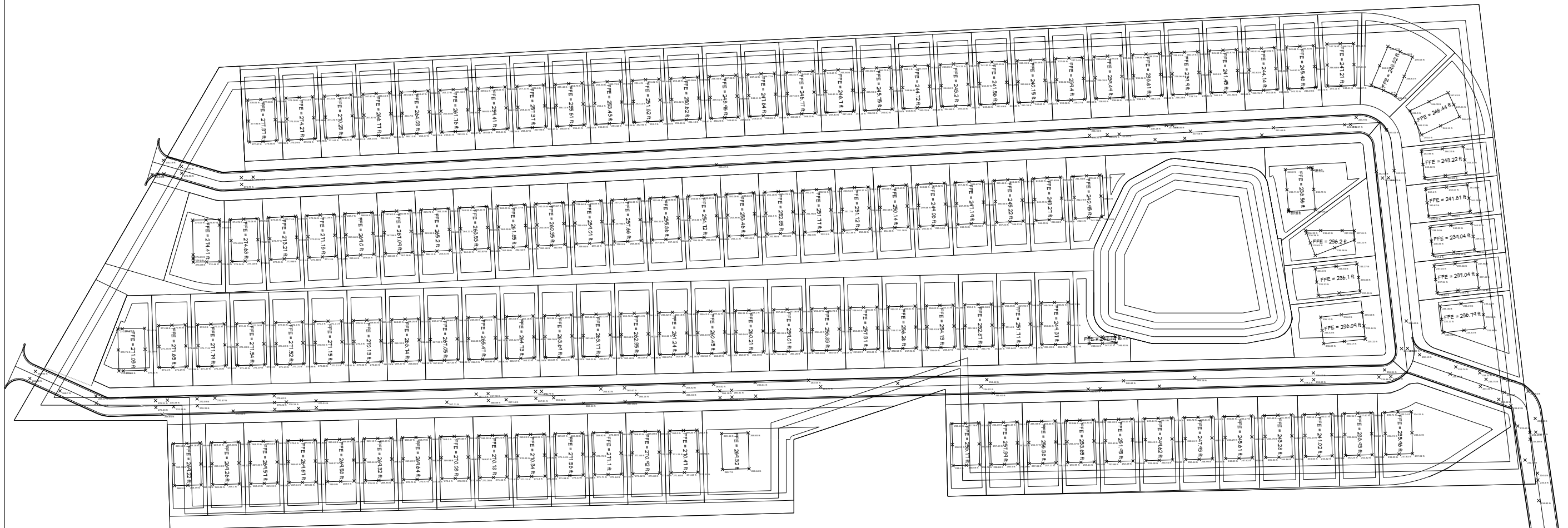


**LEGEND**

- Commercial (B)
- Industrial (ID)
- Institutional (I)
- Planned Development (PD)
- Residential (R-1)
- Existing Sanitary Sewer Line
- Proposed Sanitary Sewer Line
- Existing Water Main

Service Layer Credits: Jones|Carter, Inc.  
 Jones & Carter, Inc.  
 Sources: Esri, HERE, Garmin, Intermap, increment P Corp.,  
 GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kataster N  
 Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), Sw  
 OpenStreetMap contributors, and the GIS User Community





185 Cedar Point Dr.  
 Livingston, TX 77351  
 office: 936.646.6767  
 fax: 936.646.7970  
 www.vacationhomebuilders.com

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PORTER FARMS

DRAWN BY	-
DATE	5.18.21
SCALE	scale
FILE NAME	file
SHEET NUMBER	

1





	Development Info & Capacities																				
	Current Connections	Ultimate Connections	Water		Wastewater		2021			2022			2023			2024			2025		
			Current Actual	Ultimate	Current	Ultimate	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary
<b>Commercial Platted and Existing (cont.)</b>																					
Waterstone Commercial Reserve B	1	1	360	4,300	234	2,795															
Waterstone Commercial Reserve C (State Farm)	1	1	405	405	263	263															
Waterstone Commercial Reserve D	-	1	-	4,000	-	2,600															
Town Creek Crossing Commercial Reserves	-	6	-	7,000	-	4,550															
Depado Estates	-	5	-	10,000	-	6,500															
The Montgomery Shoppes	-	6	-	15,000	-	9,750															
Retail Center	1	1	-	3,000	-	1,950															
Chick Fil A	1	1	3,200	3,200	2,080	2,080															
Panda Express	1	1	1,400	1,400	910	910															
CVS	1	1	225	225	146	146															
Starbucks	1	1	1,000	1,000	650	650															
Burger Fresh	1	1	240	240	156	156															
Churches	12	12	3,000	3,000	1,950	1,950															
Miscellaneous Commercial	79	79	28,000	28,000	18,200	18,200															
<b>Subtotal</b>	<b>134</b>	<b>187</b>	<b>96,025</b>	<b>247,475</b>	<b>62,416</b>	<b>160,859</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>12</b>	<b>35,031</b>	<b>22,770</b>	<b>8</b>	<b>28,800</b>	<b>22,225</b>	<b>6</b>	<b>17,067</b>	<b>12,668</b>	<b>5</b>	<b>14,000</b>	<b>10,675</b>
<b>Multi Family</b>																					
Heritage Plaza (Units)	208	208	21,000	24,000	13,650	15,600															
Town Creek Village, Phase I (Units)	152	152	24,000	26,500	12,000	13,250															
Plez Morgan Townhomes	-	48	-	12,000	-	6,000	48	12,000	6,000												
Montgomery Supported Housing	14	14	2,300	2,300	1,150	1,150															
Live Oak Assisted Living	1	1	2,300	2,300	1,150	1,150															
<b>Subtotal</b>	<b>375</b>	<b>423</b>	<b>49,600</b>	<b>67,100</b>	<b>27,950</b>	<b>37,150</b>	<b>48</b>	<b>12,000</b>	<b>6,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Institutional (Schools)</b>																					
MISD Athletic Complex	2	2	6,800	6,800	3,400	3,400															
MISD High School Complex	2	2	29,000	29,000	14,500	14,500															
MISD Warehouse (105/Clepper)	1	1	360	1,500	250	750															
Bus Barn	1	1	530	530	265	265															
MISD School (MLK)	2	2	1,600	1,600	800	800															
MISD School (149)	1	1	2,800	2,800	1,400	1,400															
<b>Subtotal</b>	<b>9</b>	<b>9</b>	<b>41,090</b>	<b>42,230</b>	<b>20,615</b>	<b>21,115</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Irrigation</b>																					
Single Family Residential	61	100	16,165	26,500	-	-															
Commercial Irrigation	31	70	9,300	21,000	-	-															
Christian Brothers	1	1	1,100	1,100	-	-															
Chick Fil A	1	1	1,600	1,600	-	-															
BlueWave	1	1	500	500	-	-															
CVS	1	1	1,200	1,200	-	-															
Church	2	2	530	530	-	-															
City	9	9	4,500	4,500	-	-															
<b>Subtotal</b>	<b>107</b>	<b>185</b>	<b>34,895</b>	<b>56,930</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Committed (W/O Irrigation)</b>	<b>1,268</b>	<b>1,695</b>	<b>365,985</b>	<b>632,085</b>	<b>223,321</b>	<b>426,764</b>	<b>60</b>	<b>14,910</b>	<b>8,100</b>	<b>94</b>	<b>57,111</b>	<b>37,620</b>	<b>71</b>	<b>46,205</b>	<b>33,525</b>	<b>46</b>	<b>27,767</b>	<b>19,218</b>	<b>24</b>	<b>18,465</b>	<b>13,075</b>
<b>Total Projected Committed Volumes:</b>																					
			<b>2021</b>			<b>2022</b>			<b>2023</b>			<b>2024</b>			<b>2025</b>						
			<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	
			<b>1,328</b>	<b>380,895</b>	<b>231,421</b>	<b>1,422</b>	<b>438,006</b>	<b>269,041</b>	<b>1,493</b>	<b>484,211</b>	<b>302,566</b>	<b>1,539</b>	<b>511,977</b>	<b>321,784</b>	<b>1,563</b>	<b>530,442</b>	<b>334,859</b>				
<b>Future Development in Feasibility/Design</b>																					
Red Bird Meadows	-	556	-	139,000	-	111,200						90	22,500	18,000	90	22,500	18,000	90	22,500	18,000	
Hills of Town Creek Section 5	-	72	-	18,000	-	14,400				10	2,500	2,000	20	5,000	4,000	20	5,000	4,000	22	5,500	4,400
Porter Farms Tract	-	98	-	24,500	-	19,600				8	2,000	1,600	30	7,500	6,000	30	7,500	6,000	30	7,500	6,000
<b>Subtotal</b>	<b>-</b>	<b>726</b>	<b>-</b>	<b>181,500</b>	<b>-</b>	<b>145,200</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>18</b>	<b>4,500</b>	<b>3,600</b>	<b>140</b>	<b>35,000</b>	<b>28,000</b>	<b>140</b>	<b>35,000</b>	<b>28,000</b>	<b>142</b>	<b>35,500</b>	<b>28,400</b>
<b>Committed Plus Feasibility</b>	<b>1,268</b>	<b>2,421</b>	<b>365,985</b>	<b>813,585</b>	<b>223,321</b>	<b>571,964</b>	<b>2021</b>			<b>2022</b>			<b>2023</b>			<b>2024</b>			<b>2025</b>		
			<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	<b>Connections</b>	<b>GPD Water</b>	<b>GPD Sanitary</b>	
			<b>1,328</b>	<b>380,895</b>	<b>231,421</b>	<b>1,440</b>	<b>442,506</b>	<b>272,641</b>	<b>1,651</b>	<b>523,711</b>	<b>334,166</b>	<b>1,837</b>	<b>586,477</b>	<b>381,384</b>	<b>2,003</b>	<b>640,442</b>	<b>422,859</b>				

	Development Info & Capacities						Projections																	
	Current Connections	Ultimate Connections	Water		Wastewater		2021			2022			2023			2024			2025					
			Current Actual	Ultimate	Current	Ultimate	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary			
<b>Potential Future Development (Within Current City Limits)</b>																								
HEB Tract (HEB store only)	-	1	-	10,000	-	6,500							1	10,000	6,500									
HEB Tract (pad sites only)	-	5	-	15,000	-	9,750				1	3,000	1,950	1	3,000	2,100			1	3,000	2,100	1	3,000	2,100	
Summit Business Park, Phase 2	-	6	-	4,400	-	2,860				2	1,467	953	2	1,467	953									
Moon Over Montgomery	-	15	-	3,750	-	2,438												15	3,750	2,438				
Waterstone, Section 3	-	36	-	9,000	-	5,850							10	2,500	2,000			10	2,500	2,000	10	2,500	2,000	
Waterstone, Section 4	-	80	-	20,000	-	13,000							10	2,500	2,000			10	2,500	2,000	10	2,500	2,000	
J. Allen Kent	-	150	-	37,500	-	30,000							20	5,000	4,000			20	5,000	4,000	20	5,000	4,000	
Town Creek Crossing Section 2	-	37	-	9,250	-	7,400							15	3,750	3,000			15	3,750	3,000	7	1,750	1,400	
1097 Misc. Commercial	-	10	-	15,000	-	9,750				1	1,500	975	1	1,500	1,250			1	1,500	1,250	1	1,500	1,250	
Misc. Undeveloped (Commercial)	-	1,354	-	487,440	-	316,836				2	720	468	2	3,000	2,500			2	3,000	2,500	2	3,000	2,500	
Misc. Undeveloped (Single Family)	-	1,641	-	410,250	-	266,663				10	2,500	1,625	10	2,500	2,000			10	2,500	2,000	10	2,500	2,000	
Misc. Undeveloped (Industrial)	-	1	-	5,000	-	3,250																		
Peter Hill 5.7 Acre Feasibility	-	5	-	5,000	-	3,250				2	2,000	1,300												
The Woods of Town Creek	-	212	-	53,000	-	42,400							30	7,500	6,000			30	7,500	6,000	30	7,500	6,000	
<b>Subtotal</b>	-	<b>3,553</b>	-	<b>1,084,590</b>	-	<b>719,946</b>				<b>18</b>	<b>11,187</b>	<b>7,271</b>	<b>102</b>	<b>42,717</b>	<b>32,303</b>			<b>114</b>	<b>35,000</b>	<b>27,288</b>	<b>91</b>	<b>29,250</b>	<b>23,250</b>	
<b>Potential Future Development (ETJ)</b>																								
80-Ac Mabry Single Family	-	368	-	92,000	-	59,800							30	7,050	4,500			30	7,050	4,500	30	7,050	4,500	
Stewart Landing	-	50	-	18,000	-	11,700							10	2,350	1,500			10	2,350	1,500	10	2,350	1,500	
Misc. Undeveloped (Single Family)	-	6,595	-	1,648,750	-	1,071,688							10	2,350	1,500			10	2,350	1,500	10	2,350	1,500	
Misc. Undeveloped (Commercial)	-	1,100	-	396,000	-	257,400				5	1,800	1,170	5	7,500	6,250			5	7,500	6,250	5	7,500	6,250	
<b>Subtotal</b>	-	<b>8,113</b>	-	<b>2,154,750</b>	-	<b>1,400,588</b>				<b>5</b>	<b>1,800</b>	<b>1,170</b>	<b>55</b>	<b>19,250</b>	<b>13,750</b>			<b>55</b>	<b>19,250</b>	<b>13,750</b>	<b>55</b>	<b>19,250</b>	<b>13,750</b>	
<b>Potential Ultimate Totals</b>	<b>1,268</b>	<b>14,087</b>	<b>365,985</b>	<b>4,052,925</b>	<b>223,321</b>	<b>2,692,497</b>	<b>2021</b>			<b>2022</b>			<b>2023</b>			<b>2024</b>			<b>2025</b>					
							Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary	Connections	GPD Water	GPD Sanitary			
							1,328	380,895	231,421	1,463	455,492	281,082	1,831	598,664	388,661	2,186	715,681	476,917	2,498	818,146	555,392			
							<b>Total Potential Ultimate</b>																	

**Table 1.1 September 2017 ESFC Table for Commonly Used Meters**

<b>Meter Size</b>	<b>Maximum Continuous Operating Capacity (GPM)</b>	<b>Equivalent Single Family Home (ESFC)</b>	<b>Maximum Assessable Water Fee (\$)</b>	<b>Maximum Assessable Waste Water Fee (\$)</b>	<b>Maximum Assessable Fee (\$)</b>
5/8"	15	1.00	1,126	\$2,513	\$3,639
3/4"	25	1.67	1,881	\$4,198	\$6,079
1"	40	2.67	3,001	\$6,711	\$9,712
1 1/2"	120	8.00	9,006	\$20,103	\$29,112
2"	170	11.33	12,755	\$28,471	\$41,226
3"	350	23.33	26,264	\$58,626	\$84,890
4"	600	40.00	44,942	\$100,517	\$145,429
6"	1,200	80.00	90,064	\$201,035	\$291,099
8"	1,800	120.00	135,096	\$301,552	\$436,648

**ESCROW AGREEMENT, SECTION 2.03 ATTACHMENT**

**BY AND BETWEEN**

**THE CITY OF MONTGOMERY, TEXAS,**

**AND**

**Waterstone Development Group, LLC**

**Dev. No. 2101**

THE STATE OF TEXAS                    ⊃

COUNTY OF MONTGOMERY            ⊃

As per section 2.03, the Feasibility Study completed an estimate of the additional escrow amount, which was determined for administration costs, legal fees, plan reviews, developer coordination, construction coordination, construction inspection, and warranty of services. The required additional amount is below:

Administration	\$ 7,500
City Attorney	\$ 7,500
City Engineer	\$ 47,000
<hr/>	
TOTAL	\$ 62,000

Montgomery Planning and Zoning Commission  
**AGENDA REPORT**

<b>Meeting Date:</b> 12/07/2021	<b>Budgeted Amount:</b>
<b>Department:</b> Administration	<b>Prepared By:</b> Dave McCorquodale

**Subject**

Consideration and possible action regarding a Preliminary Report and calling Public Hearings for a rezoning request from B—Commercial to R1—Single-Family Residential for Hills of Town Creek Section Five.

**Recommendation**

Discuss the request and what details to include in the Preliminary Report and call two Public Hearings to be held on January 4, 2022 at Montgomery City Hall beginning at 6:00 PM.

**Discussion**

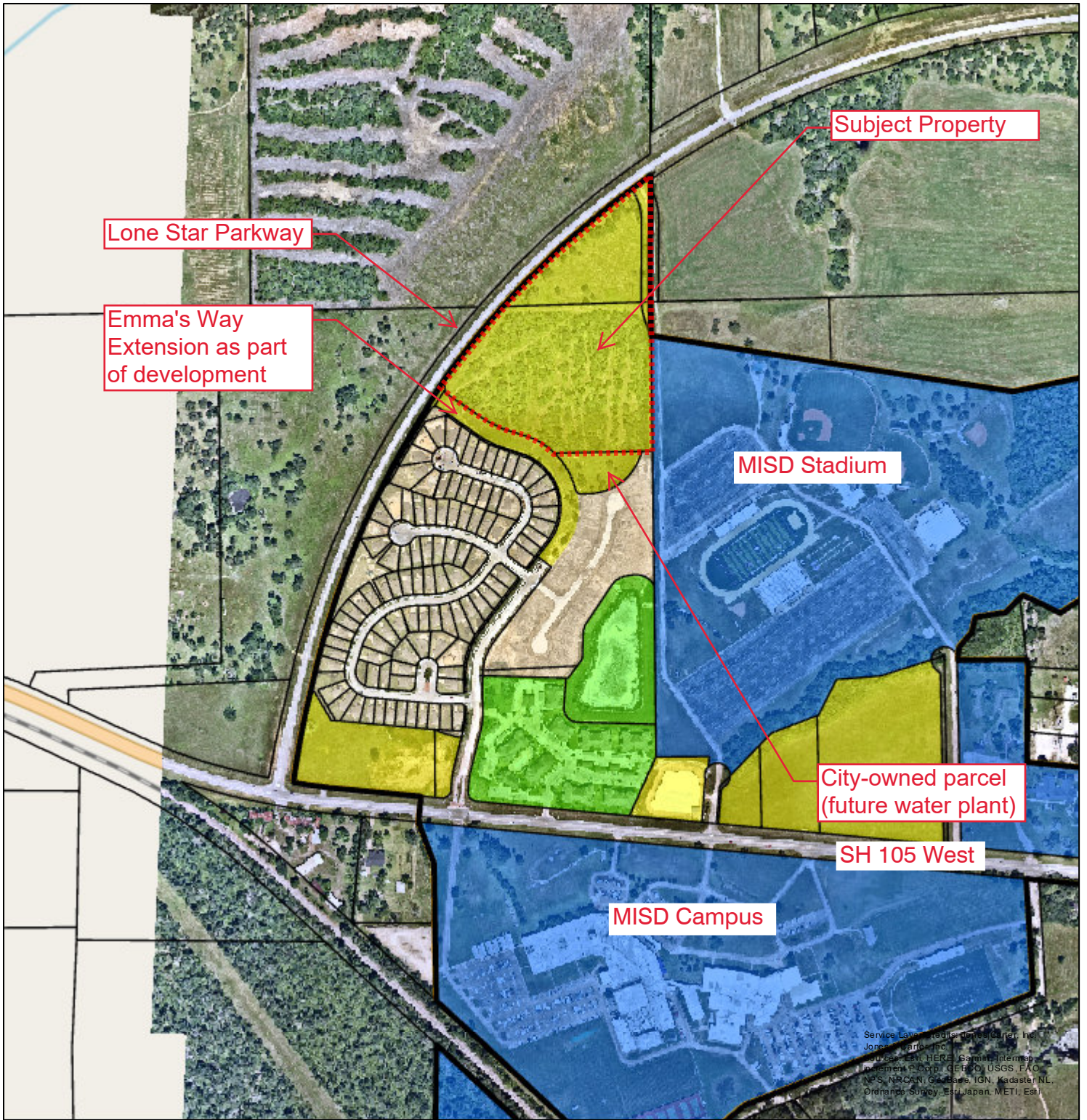
This planned addition to the Hills of Town Creek subdivision will be the same home product (still built by Stylecraft Builders) and character as previous sections. The property is currently zoned B-Commercial, and while residential use is allowed in commercial districts, the best action to take is to rezone the property to Single-Family Residential before subdividing the land. The property is identified as future high-density single-family residential on the City’s (unadopted) Future Land Use Plan. High-density residential use as contemplated by the Future Land Use Plan is lots less than 75’ wide, though still single-family residential. This is consistent with the previous sections of the subdivision. An aerial exhibit is attached for reference.

The rezoning process (and any other amendments to a city’s zoning regulations) is established by state law and requires local governments to provide opportunity for public input on rezoning requests. Accordingly, both the P&Z and City Council hold Public Hearings, and the P&Z submits a Final Report to the City Council before they act on the request. Tonight’s action is to conduct an initial study of the request and to schedule the Public Hearings. The Final Report and Recommendation will be discussed following the Public Hearings in January.

**Approved By**

Asst. City Administrator	Dave McCorquodale	Date: 12/02/2021
City Administrator	Richard Tramm	Date: 12/02/2021





1 inch equals 752 feet

Service Layer Credits: Jones & Carter, Inc., Jones & Carter, Inc., Google Earth, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GEBCO, IGN, Kadaster NL, Ordnance Survey, Esri, Japan, METI, Esri

**Zoning Legend**

- Commercial (B)
- Residential (R-1)
- Multi-Family (R-2)
- Institutional (I)

- City Limit
- City ETJ



Date: 12/2/2021



# L SQUARED ENGINEERING

MUNICIPAL COMMERCIAL RESIDENTIAL

3307 W Davis St., Suite 100  
Conroe, TX 77304  
P: 936-647-0420 F: 936-647-2366  
www.L2Engineering.com

November 30, 2021

City of Montgomery  
C/o Dave McCorquodale  
101 Old Plantersville Road  
Montgomery, TX 77316

RE: Rezoning request for Hills of Town Creek Section 5 for development purposes by Cheatham Management

L Squared Engineering is formally requesting a rezoning for MCAD R#'s R396538 and R362324. Currently the referenced properties are zoned for commercial. The proposed zoning is R1, which corresponds to the residential development that shall be Hills of Town Creek Section 5.

Attached below are the Rezoning Application form and required attachments mentioned on that form. Please feel free to contact me at 936-647-0420 if you have any questions or concerns.

Thank you,

Jonathan White, PE  
L Squared Engineering  
Senior Project Manager, Partner  
936-647-0420  
Jwhite@L2Engineering.com

Attachments: Rezoning Request Application, Metes and Bounds, Property Deed, Site Plan







# Rezoning Application

City of Montgomery  
101 Old Plantersville Road  
Montgomery, Texas 77316  
(936) 597-6434

Item 4.

**Upon completion return application to dmccorquodale@ci.montgomery.tx.us**

### Contact Information

Property Owner(s): Chris Cheatham, Cheatham Management

Address: PO Box 234 Montgomery TX

Zip Code: 77356 Phone: 936-449-5400

Email Address: ccheatham@consolidated.net

Applicants: L Squared Engineering, Jonathan White, PE

Address: 3307 W Davis Street Suite 100 Conroe Texas

Zip Code: 77304 Phone: 936-647-0420

Email Address: Jwhite@L2engineering.com

### Parcel Information

Property Identification Number (MCAD R#): R396538 and R362324

Legal Description: Tracts 64B-1 and 63A1-A within the Ben J Rigsby Survey, A31

Street Address or Location: Emma's Way and Lone Star Parkway

Acreage: 16.41 Present Zoning: Commercial Present Land Use: N/A

Proposed Zoning: R1 Proposed Land Use: Residential

Is the proposed use in compliance with the Future Land Use Plan?  YES  NO

### Additional Information

Owner(s) of record for the above described parcel:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Note: Signatures are required for all owners of record for the property proposed for Special Use Permit. Attach additional signatures on a separate sheet of paper.*

<h2>Date Received</h2> <p>Office Use</p>	
--	--

## **\*Additional Information\***

Item 4.

The following information must also be submitted:

Cover letter on company letterhead stating what is being asked.

Metes and Bounds.

All applicable fees and payments.

Copies of all deeds or a title opinion from a licensed attorney establishing current ownership of the property for which the zoning change is sought.

A site plan. If there are existing structures, parking, curb cuts and drainage they must be shown.

The application from must be signed by the owner/applicant. If the applicant is not the owner, written authorization from the owner authorizing the applicant to submit the rezoning request shall be submitted.

## **\*Public Hearings\***

Parties in interest and citizens shall have an opportunity to be heard at public hearings conducted by the Planning and Zoning Commission and the City Council before any amendment to a district regulation, restriction, or boundary shall become effective. Regularly scheduled meetings are as follows and will be held accordingly unless public notice has been given of a change of dates:

Planning and Zoning Commission: **1<sup>st</sup> Tuesday of every month at 6:00 p.m.**

City Council: **2<sup>nd</sup> and 4<sup>th</sup> Tuesday of every month at 6:00 p.m.**

## **\*Protests\***

If a protest against a proposed zoning change including PDD and SUP requests has been filed with the City Secretary, duly signed and acknowledged by the owners of twenty percent (20%) or more, either of the area of the land included in such a proposed change or those owners of property immediately adjacent to the subject property and extending two hundred feet (200) there from, such zoning change shall not become effective except by a three-fourths (3/4) vote of governing body in accordance with the provisions of Section 211.006 of the Texas Local Government Code.

## **\*Resubmission\***

Rezoning requests which have been heard and decided by the Council of the City of Montgomery may not be re-filed with the City for six (6) months after the date of such decision by the Council, absent a change in circumstances.

Rezoning requests for the same property to a different classification than the denied request may be re-filed prior to the expiration of six (6) months.

## LEGAL DESCRIPTION

BEING 16.4111 acres (714,867 square feet) of land, out of the called 12.384 acre tract conveyed to WTRM Barrier Real Estate, LP, by Warranty Deed recorded under Clerk's File No. 2013067842 of the Official Public Records of Montgomery County, Texas (O.P.R. M.C.T.), and the residue of a called 100.0 acre tract conveyed to Christian C. Cheatham and wife, Mary E. Cheatham, by Warranty deed recorded under Clerk's File no. 2002122759 O.P.R. M.C.T., said 16.4111 acre tract lying within the Benjamin Rigsby Survey, A-31, and is more particularly described as follows:

BEGINNING at a 5/8" iron rod with cap found, marking the northwest easterly cut back corner of a called 0.589 acre tract conveyed to M.I.S.D. by Warranty Deed recorded under Clerk's File No. 2010101628 O.P.R. M.C.T.;

THENCE in a southerly direction with the west line of said 0.589 acre tract, 132.50 feet along the arc of a curve to the RIGHT, having a radius of 260.00 feet, a delta angle of 29°11'55", and whose long chord bears South 17°09'39" East, a distance of 131.07 feet to a 5/8" iron rod with cap found for a tangent;

THENCE South 02°33'39" East, a distance of 343.36 feet to a 5/8" iron rod with cap marked "CORE 6657" set for the southwest corner of said 0.589 acre tract and northwest corner of a called 0.091 acre tract conveyed to M.I.S.D. by Warranty Deed recorded under Clerk's File No. 2010101631 O.P.R. M.C.T.;

THENCE in a southerly direction with the west line of said 0.091 acre tract, 127.25 feet along the arc of a curve to the RIGHT, having a radius of 340.00 feet, a delta angle of 21°26'39", and whose long chord bears South 13°09'19" East a distance of 126.51 feet to a point for a reverse curve, from which a 5/8" iron rod with cap found bears, North 23°50'01" West, 0.43 feet;

THENCE in a southerly direction, continuing with the west line of said 0.091 acre tract, 95.16 feet along the arc of a curve to the LEFT, having a radius of 260.00 feet, a delta angle of 20°58'12", and whose long chord bears South 13°23'33" East, a distance of 94.63 feet to a 5/8 inch iron rod found in the west line of a called 61.8107 acre tract conveyed to the Montgomery Independent School District (M.I.S.D.), BY Warranty deed recorded under Clerk's File No. 2001065612 O.P.R. M.C.T. and most southerly corner of said 0.091 acre tract;

THENCE South 02°54'27" East, with the west line of said 61.8107 acre tract, a distance of 487.90 feet to a point for the northeast corner of Lot 8, Block 1, of Hills of Town Creek, Section 1, according to the Plat of same, recorded under Cabinet Z, Sheet 2346, of the Map Records of Montgomery County, Texas (M.R. H.C.T.), and the southeast corner of said 12.384 acre tract and the herein described tract, from which a found 2 inch iron pipe bears South 56°28'05" East, a distance of 0.79 feet;

THENCE South 87°05'33" West, with the north line of said Lot 8, Block 1, and the north line of a called 1.23 acre tract conveyed to the City of Montgomery by Warranty Deed recorded under Clerk's File No. 2012076184 O.P.R. M.C.T., a distance of 451.98 feet to a point for the northwest corner of said 1.223 acre tract and the southwest corner of the herein described tract, from which a 5/8 inch iron rod found bears North 89°39'07" West, a distance of 0.43 feet;

THENCE in a northwesterly direction along a future north right of way line, 150.55 feet along the arc of a curve to the LEFT, having a radius of 335.00 feet, a delta angle of 25°44'56", and whose long chord bears North 61°15'13" West, a distance of 149.29 feet to a 5/8 inch iron rod found;

THENCE North 74°12'59" West, continuing with said future north right of way line, a distance of 125.24 feet to a 5/8" iron rod with cap found for a point of curvature;

THENCE continuing with said future north right of way line, 75.40 feet along the arc of a curve to the RIGHT, having a radius of 265.00 feet, a delta angle of 16°18'11", and whose long chord bears North 66°03'53" West, a distance of 75.15 feet to a 5/8" iron rod with cap found for a tangent;

THENCE North 57°54'46" West, continuing with said future north right of way line, a distance of 234.80 feet to a point at the beginning of a curve for the southerly west corner of the herein described tract, from which a 5/8" iron rod with cap bears, North 61°55'16" West, 0.27 feet;

THENCE in a northwesterly direction, 39.66 feet along the arc of a curve to the RIGHT, having a radius of 25.00 feet a delta angle of 90°53'37", and whose long chord bears North 12°28'03" West a distance of 35.63 feet to a point in the south right of way line of Lone Star Parkway (180 foot R.O.W.) for the west corner of the herein described tract, from which a Brass Disk bears, North 65°36'40" West, 1.28 feet;

THENCE in a northeasterly direction with said south right of way line, along the arc of a curve to the RIGHT, having a radius of 3910.00 feet, a delta angle of 17°52'31", and whose long chord bears North 41°54'56" East, a distance of 1214.92 feet, at 467.25 feet, passing a 5/8 inch iron rod found for the northwest corner of said 12.384 acre tract, and continuing for a total distance of 1219.86 feet to a 5/8" iron rod with cap marked "CORE 6657" set for the northwest corner of said 0.589 acre tract and the northwest corner of the herein described tract;

THENCE in a southeasterly direction, 42.49 feet along the arc of a curve to the RIGHT, having a radius of 25.00 feet, a delta angle of 97°23'20", and whose long chord bears South 80°27'13" East a distance of 37.56 feet to the POINT OF BEGINNING, containing 16.4111 acres (714,867 square feet) of land.



**NOTICE OF CONFIDENTIALITY RIGHTS: IF YOU ARE A NATURAL PERSON, YOU MAY REMOVE OR STRIKE ANY OR ALL OF THE FOLLOWING INFORMATION FROM ANY INSTRUMENT THAT TRANSFERS AN INTEREST IN REAL PROPERTY BEFORE IT IS FILED FOR RECORD IN THE PUBLIC RECORDS: YOUR SOCIAL SECURITY NUMBER OR YOUR DRIVER'S LICENSE NUMBER.**

---

**GENERAL WARRANTY DEED**

**Date:** JUNE 18, 2013

**Grantor:** WILLIAM T. BARNIER

**Grantor's Mailing Address (including county):**

1927 Willow Wisp Lane  
Spring, Texas 77388  
Harris County

**Grantee:** WTRM BARNIER REAL ESTATE, LP, a Texas limited partnership

**Grantee's Mailing Address (including county):**

1927 Willow Wisp Lane  
Spring, Texas 77388  
Harris County

**Consideration:** TEN AND NO/100 DOLLARS and other good and valuable consideration.

**Property (including any improvements):**

Being 12.384 acres of land, more or less, in the Benjamin Rigsby Survey, A-31, Montgomery County, Texas; being further described in that certain Warranty Deed, dated March 31, 2009, recorded under Clerk's File Number: 2009026051 in the Official Public Records of Real Property of Montgomery County, Texas, and being more particularly described by metes and bounds on Exhibit "A" attached hereto and incorporated herein for all purposes.

**Reservations from and Exceptions to Conveyance and Warranty:**

This deed is subject to all easements, rights-of-way, and prescriptive rights, whether of record or not; all presently recorded instruments, other than liens and conveyances that affect the property; taxes for the current year, the payment of which Grantee assumes.

Grantor, for the Consideration and subject to the Reservations from Conveyance and the Exceptions to Conveyance and Warranty, grants, sells, and conveys to Grantee the Property, together with all and singular the rights and appurtenances thereto in any way belonging, to have and to hold it to Grantee and grantee's heirs, successors, and assigns forever. Grantor binds Grantor and Grantor's heirs and successors to warrant and forever defend all and singular the Property to Grantee and Grantee's heirs, successors, and assigns against every person whomsoever lawfully claiming or to claim the same or any part thereof, except as to the Reservations from Conveyance and the Exceptions to Conveyance and Warranty.

When the context requires, singular nouns and pronouns include the plural.

*William T. Barnier*  
\_\_\_\_\_  
**WILLIAM T. BARNIER**

**STATE OF TEXAS** §

**ACKNOWLEDGEMENT**

**COUNTY OF HARRIS** §

This instrument was acknowledged before me on the 8<sup>th</sup> day of JUNE, 2013, by **WILLIAM T. BARNIER.**



*[Signature]*  
\_\_\_\_\_  
Notary Public, State of Texas

[Notary Stamp]

**PREPARED BY AND RETURN TO THE OFFICE OF:**

Riddle & Akiens, LLP  
4201 Cypress Creek Parkway, Suite 550  
Houston, Texas 77068  
PH: 281-537-7110  
FAX: 281-537-9481

THIS INSTRUMENT WAS PREPARED BY RIDDLE & AKIENS, LLP, 4201 CYPRESS CREEK PARKWAY, SUITE 550, HOUSTON, TEXAS 77068 AT THE SPECIFIC REQUEST OF THE GRANTOR BASED SOLELY UPON INFORMATION SUPPLIED BY ONE OR MORE OF THE PARTIES TO THIS CONVEYANCE, AND WITHOUT EXAMINATION OF TITLE OR ABSTRACT. THE DRAFTER ASSUMES NO LIABILITY FOR ANY ERRORS, INACCURACIES OR OMISSIONS IN THIS INSTRUMENT RESULTING FROM THE INFORMATION PROVIDED AND MAKES NO ASSERTIONS WITH RESPECT TO LIENS WHICH MAY BE AGAINST THE PROPERTY, AND THE PARTIES HERETO SIGNIFYING THEIR ASSENT TO THIS DISCLAIMER BY THE GRANTOR'S EXECUTION AND THE GRANTEE'S ACCEPTANCE OF THIS INSTRUMENT.

## EXHIBIT "A"

## METES AND BOUNDS DESCRIPTION

Of 12.384 Acres or 539,430 Square Feet of land being part of that certain 79.9035 Acre Tract of land conveyed from MONTGOMERY INDEPENDENT SCHOOL DISTRICT to MONTGOMERY ENERGY RESOURCES, INC., etal by a deed dated July 18, 2001 and recorded under Clerk's File No. 2001-065611, of the Deed Records of Montgomery County, Texas (M.C.D.R.), lying in the BENJAMIN RIGBY LEAGUE, Abstract 31, near Montgomery, Montgomery County, Texas, said 12.384 Acre tract is more particularly described by metes and bounds as follows:

BEGINNING at the Northeast corner of said 79.9035 Acre Tract of land, the Southeast corner of that certain 100.0 Acre Tract of land conveyed from Bruce Gibson, etux to Christian C. Cheatam, etux by a deed dated November 15, 2002 and recorded under Clerk's File No. 2002-122759, M.C.D.R., same being the West line of that certain 19.000 Acre Tract of land conveyed from David J. Askanase to Henry F. Carwile, etux by a deed dated March 28, 1994 and recorded under Clerk's File No. 9419447, M.C.D.R., from which a axle was found South, 0.08 feet, and East, 0.24 feet;

THENCE South 02 deg. 51 min. 44 sec. East, along the East line of said 79.9035 Acre Tract of land, same being the West line of said 19.000 Acre Tract of land, at a distance of 147.31 feet pass the Northwest corner of that certain 61.8107 Acre Tract of land conveyed from Christian C. Cheatam, Mary E. Cheatam and MONTGOMERY ENERGY RESOURCES, INC. to MONTGOMERY INDEPENDENT SCHOOL DISTRICT by a deed dated July 18, 2001 and recorded under Clerk's File No. 2001-065612, M.C.D.R., from which a 1/2 inch iron rod was found East, 0.14 feet, continuing along the East line of said 79.9035 Acre Tract of land, same being the West line of said 61.8107 Acre Tract of land, in all a distance of 690.88 feet to a 5/8 inch iron rod with a cap set at a point for corner;

THENCE South 87 deg. 08 min. 16 sec. West, a distance of 451.62 feet to a 5/8 inch iron rod with a cap set at a point for corner;

THENCE, Northwesterly, along the Northeast Right-of-Way of a 70 foot Proposed Road, a distance of 150.89 feet along the arc of a curve to the left, said curve having a central angle of 25 deg. 48 min. 27 sec., radius of 335.00 feet, a chord which bears North 61 deg. 16 min. 02 sec. West, and a chord distance 149.62 feet to a 5/8 inch iron rod with a cap set at a point for corner;

THENCE North 74 deg. 10 min. 16 sec. West, along the North Right-of-Way of said 70 foot Proposed Road, a distance of 125.24 feet to a 5/8 inch iron rod with a cap set at a point for corner;

THENCE, Northwesterly, along the North Right-of-Way of said 70 foot Proposed Road, a distance of 75.41 feet along the arc of a curve to the right, said curve having a central angle of 16 deg. 18 min. 13 sec., radius of 265.00 feet, a chord which bears North 66 deg. 01 min. 09 sec. West, and a chord distance 75.15 feet to a 5/8 inch iron rod with a cap set at a point for corner;

THENCE North 57 deg. 52 min. 03 sec. West, along the North Right-of-Way of said 70 foot Proposed Road, a distance of 235.29 feet to a 5/8 inch iron rod with a cap set at a point for corner;

THENCE, Northwesterly, along the Northeast cutback corner of the North Right-of-Way of said 70 foot Proposed Road and the East Right-of-Way of a UNKNOWN NAMED ROAD, (180 foot R.O.W., M.C.C.F. No. 2006-087874, M.C.D.R.), a distance of 39.66 feet along the arc of a curve to the right, said curve having a central angle of 90 deg. 53 min. 06 sec., radius of 25.00 feet, a chord which bears North 12 deg. 25 min. 30 sec. West, and a chord distance 35.63 feet to a 5/8 inch iron rod with a cap set at a point for corner;

THENCE, Northeasterly, along the East Right-of-Way of said UNKNOWN NAMED ROAD, a distance of 467.21 feet along the arc of a curve to the right, said curve having a central angle of 6 deg. 50 min. 47 sec., radius of 3910.00 feet, a chord which bears North 36 deg. 26 min. 26 sec. East, and a chord distance 466.93 feet to a 5/8 inch iron rod with a cap set at a point for corner;

THENCE North 86 deg. 32 min. 01 sec. East, along the North line of said 79.9035 Acre Tract of land, same being the South line of said 100.0 Acre Tract of land, a distance of 667.70 feet to the POINT OF BEGINNING, containing within these calls 12.384 Acres or 539,430 Square Feet of land, as depicted by a plat prepared by Donald K. Hall, R.P.L.S. No. 4070 dated March 30, 2009.

**FILED FOR RECORD**

06/26/2013 1:47PM



COUNTY CLERK  
MONTGOMERY COUNTY, TEXAS

STATE OF TEXAS  
COUNTY OF MONTGOMERY

I hereby certify this instrument was filed in file number sequence on the date and at the time stamped herein by me and was duly RECORDED in the Official Public Records of Montgomery County, Texas.

**06/26/2013**



County Clerk  
Montgomery County, Texas



**LEGEND / ABBREVIATIONS**

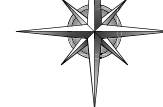
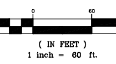
BARBED WIRE	X	C.F.N.	ABSTRACT
GRAPE VINE	—	F.I.D.	CLIENT'S FILE NUMBER
DATE POST	○	LR	LOCAL RECORD
PROPERTY MARKER	●	O.P.R.	OFFICIAL PUBLIC RECORDS
UNDERGROUND CABLE	—	M.C.T.	MONTGOMERY COUNTY, TEXAS
SOND	—	M.R.	MAP RECORD
		P.O.B.	POINT OF BEGINNING
		R.O.W.	RIGHT OF WAY
		"	IRON ROD WITH CAP
		"	CORE 6657

**CITY OF MONTGOMERY BENCHMARKS**

**MONY 3** ELEV.=268.73'  
 2" BRASS DISK LOCATED FROM THE INTERSECTION OF HWY 105 AND HWY 140, WEST 4,000' TO THE PARKING LOT OF THE HERITAGE HOUSE RESTAURANT, WHICH IS LOCATED ON THE NORTH SIDE OF HWY 105.

**MONY 7** ELEV.=291.77'  
 2" BRASS DISK IS LOCATED IN THE CENTER OF MONTGOMERY ON THE SOUTH SIDE OF HWY 105, MARK IS IN FRONT (NORTH) OF GAS FLOWING AREA OF BROOKHIRE BROTHERS GROCERY STORE, AS WELL AS ACROSS HWY 105(SOUTH) FROM THE OLDE QUILL HOUSE.

**GRAPHIC SCALE**



**LOCATION MAP**  
 NOT TO SCALE

**LEGAL DESCRIPTION**

**BEING** 16,411 acres (714,867 square feet) of land, out of the called 12,384 acre tract conveyed to WITN Barner Real Estate, LP by Warranty Deed recorded under Clerk's File No. 2013067842 of the Official Public Records of Montgomery County, Texas (O.P.R. M.C.T.), and the residue of a called 100.0 acre tract conveyed to Christian C. Cheatham and wife, Mary Z. Cheatham, by Warranty Deed recorded under Clerk's File No. 20122759 O.P.R. M.C.T., and 16,411 acre tract lying within the Benjamin Rigby Survey, A-31, and is more particularly described as follows:

**BEGINNING** at a 5/8" iron rod with cap found, marking the northeast exterior end back corner of a called 0.589 acre tract conveyed to M.I.S.D. by Warranty Deed recorded under Clerk's File No. 20101628 O.P.R. M.C.T.;

**THENCE** in a southerly direction with the west line of said 0.589 acre tract, 132.00 feet along the arc of a curve to the RIGHT, having a radius of 2620.00 feet, a delta angle of 297.50', and whose long chord bears South 177°29' East, a distance of 151.07 feet to a 5/8" iron rod with cap found for a benchmark;

**THENCE** South 02°25'37" East, a distance of 843.36 feet to a 5/8" iron rod with cap marked "CORE 6657" set for the southeast corner of said 0.589 acre tract and northeast corner of a called 0.091 acre tract conveyed to M.I.S.D. by Warranty Deed recorded under Clerk's File No. 20100523 O.P.R. M.C.T.;

**THENCE** in a southerly direction with the west line of said 0.091 acre tract, 127.25 feet along the arc of a curve to the RIGHT, having a radius of 3400.00 feet, a delta angle of 17°29'31", and whose long chord bears South 170°19' East, a distance of 126.51 feet to a point for a reverse curve, from which a 5/8" iron rod with cap found bears North 230°02' West, 0.43 feet;

**THENCE** in a southerly direction, continuing with the west line of said 0.091 acre tract, 95.16 feet along the arc of a curve to the LEFT, having a radius of 2620.00 feet, a delta angle of 297.50', and whose long chord bears South 173°13' East, a distance of 84.98 feet to a 5/8" iron rod with cap found for a benchmark, and the northeast corner of said 12,384 acre tract and the north line of said 16,411 acre tract, from which a found 2 inch iron pipe bears North 56°28'00" East, a distance of 0.79 feet;

**THENCE** South 87°52'37" West, with the north line of said Lot 1, Block 1, and the north line of a called 1.33 acre tract conveyed to the City of Montgomery by Warranty Deed recorded under Clerk's File No. 201020184 O.P.R. M.C.T., a distance of 401.98 feet to a point for the northwest corner of said 1.333 acre tract and the southwest corner of the herein described tract, from which a 5/8" iron rod with cap found bears North 60°03'33" West, a distance of 73.15 feet to a 5/8" iron rod with cap found for a benchmark;

**THENCE** in a northwesterly direction along a future north right of way line, 155.55 feet along the arc of a curve to the LEFT, having a radius of 3520.00 feet, a delta angle of 22°44'56", and whose long chord bears North 61°07'13" West, a distance of 149.20 feet to a 5/8" iron rod with cap found;

**THENCE** North 74°12'09" West, continuing with said future north right of way line, a distance of 125.24 feet to a 5/8" iron rod with cap found for a benchmark;

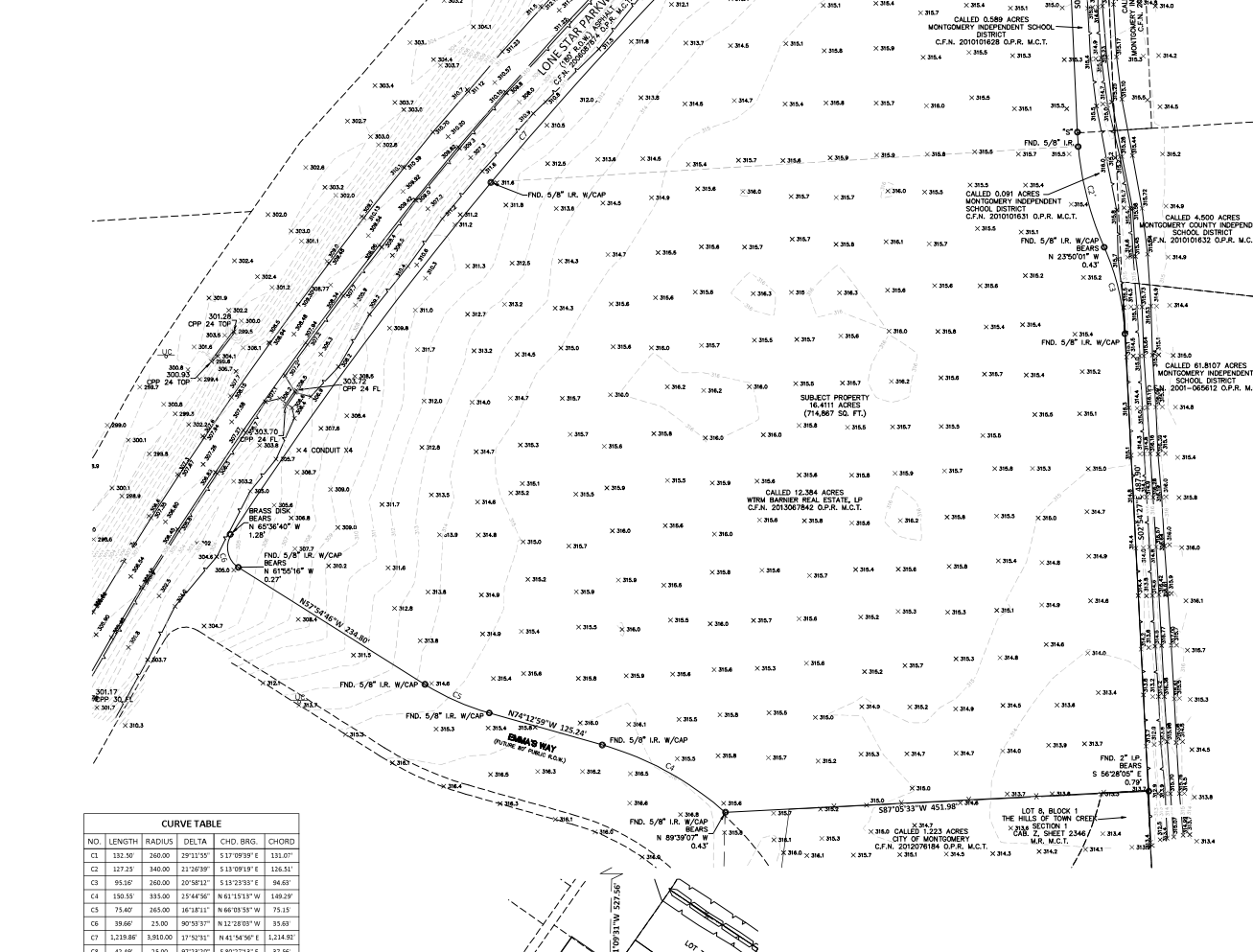
**THENCE** continuing with said future north right of way line, 75.40 feet along the arc of a curve to the RIGHT, having a radius of 2620.00 feet, a delta angle of 16°18'31", and whose long chord bears North 60°03'33" West, a distance of 73.15 feet to a 5/8" iron rod with cap found for a benchmark;

**THENCE** North 07°54'46" West, continuing with said future north right of way line, a distance of 234.80 feet to a point at the beginning of a curve for the southerly west corner of the herein described tract, from which a 5/8" iron rod with cap found bears North 61°50'18" West, 0.27 feet;

**THENCE** in a northwesterly direction, 336.66 feet along the arc of a curve to the RIGHT, having a radius of 2520.00 feet, a delta angle of 18°23'37", and whose long chord bears North 122°07' West, a distance of 324.63 feet to a point on the south right of way line of Lone Star Parkway (180 foot R.O.W.) for the west corner of the herein described tract, from which a Brass Disk bears North 102°50'18" West, 0.27 feet;

**THENCE** in a northwesterly direction with said south right of way line, along the arc of a curve to the RIGHT, having a radius of 3930.00 feet, a delta angle of 17°52'31", and whose long chord bears North 41°54'56" East, a distance of 124.49 feet, at 462.22 feet, possibly a 5/8" iron rod found for the northwest corner of said 12,384 acre tract, and continuing for a total distance of 1218.86 feet to a 5/8" iron rod with cap marked "CORE 6657" set for the northwest corner of said 0.589 acre tract and the northeast corner of the herein described tract;

**THENCE** in a southerly direction, 42.49 feet along the arc of a curve to the RIGHT, having a radius of 2520.00 feet, a delta angle of 18°23'37", and whose long chord bears North 80°27'13" East, a distance of 37.56 feet to the POINT OF BEGINNING, containing 16,411 acres (714,867 square feet) of land.

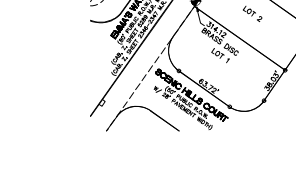


**CURVE TABLE**

NO.	LENGTH	RADIUS	DELTA	CHD. BRG.	CHORD
C1	132.50	2620.00	297.50°	S17°09'39" E	151.07
C2	127.25	3400.00	17.29°	S17°09'39" E	126.51
C3	95.16	2620.00	107.60°	S103°03'13" E	84.98
C4	155.55	3520.00	15.55°	N61°07'13" W	149.20
C5	75.40	2620.00	16.18°	N60°03'33" W	73.15
C6	336.66	2520.00	80.93°	N122°07'00" W	324.63
C7	1218.86	3510.00	17.52°	N41°54'56" E	1214.92
C8	42.49	2520.00	18.23°	S80°27'13" E	37.56

**GENERAL NOTES**

- The survey was not abstracted the site. This survey was performed without benefit of title commitment and not show all easements and encumbrances of record.
- The professional service reflected on this plat of survey is provided in connection with the transaction contemplated by the title search referenced and dated above; it is not to be used for any other purpose.
- Bearing based on Texas State Plane Coordinates, South Central Zone 4204, NAD83.
- This original work is protected under copyright laws, Title 17 United States Code Sections 101 and 102. All violators will be prosecuted to the fullest extent of the law. This survey to be provided solely for the use of the recipient named and no license has been created, express or implied, to copy the survey except as is necessary in conjunction with the original transaction, which shall take place within thirty (30) days from the date adjacent to the signature line herein.
- Flood Statement:** This site is situated in Zone "X" in Montgomery County, Texas according to FEMA map number 48330C02000 dated August 18, 2016. This statement does not imply that the property and/or the structures thereon will be free from flooding or flood damage. This determination has been made by copying the property on the referenced map and is the result of an elevation survey. This flood statement and its contents create no liability on the part of the surveyor.



To: L Squared Engineering  
 I certify that this survey was made on the ground, that this plat correctly represents the facts found at the time of survey and that this professional service substantially conforms to the current Texas Society of Professional Surveyors Standards and Specifications for a Category 1B/6, Condition II Survey.

Clemente Turmudartes, Jr.  
 Registered Professional Land Surveyor  
 Texas Registration No. 6657  
 Date: October 19, 2021

**ISSUE**

CHECK CT	TO	DATE
DRAWN-JAB	CLIENT	10/19/21
JOB: 161400325		
<b>SUR-1</b>		
SHEET 1 OF 1		

**DRAWING**

FIELD BK	2020
FIELD WKR	JM
DATE	09/23/21
DRAWING	JAB
DATE	10/01/21
CHECKED	CT
DATE	10/19/21

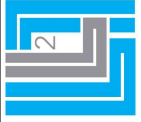
**BOUNDARY / TOPOGRAPHIC SURVEY**  
 16,411 ACRES (714,867 SQ. FT.)  
 OUT OF  
 ES. OF 100.0 ACRES C.F.N. 2001122759 O.P.R. M.C.T.  
 & CALLED 12,384 ACRES C.F.N. 2013067842 O.P.R. M.C.T.  
 IN THE BENJAMIN RIGBY SURVEY, A-31  
 MONTGOMERY COUNTY, TEXAS

**L SQUARED ENGINEERING**  
 MUNICIPAL COMMERCIAL RESIDENTIAL

3307 W. Davis Street, Suite 100  
 Conroe, TX 77330

**CORE**  
 LAND SURVEYING TPLS REG NO. 10194980

10010 ORCHARD VILL ROAD, SUITE 120  
 THE WOODLANDS, TX 77380  
 T: 281-428-3258  
 core@coresurvey.com



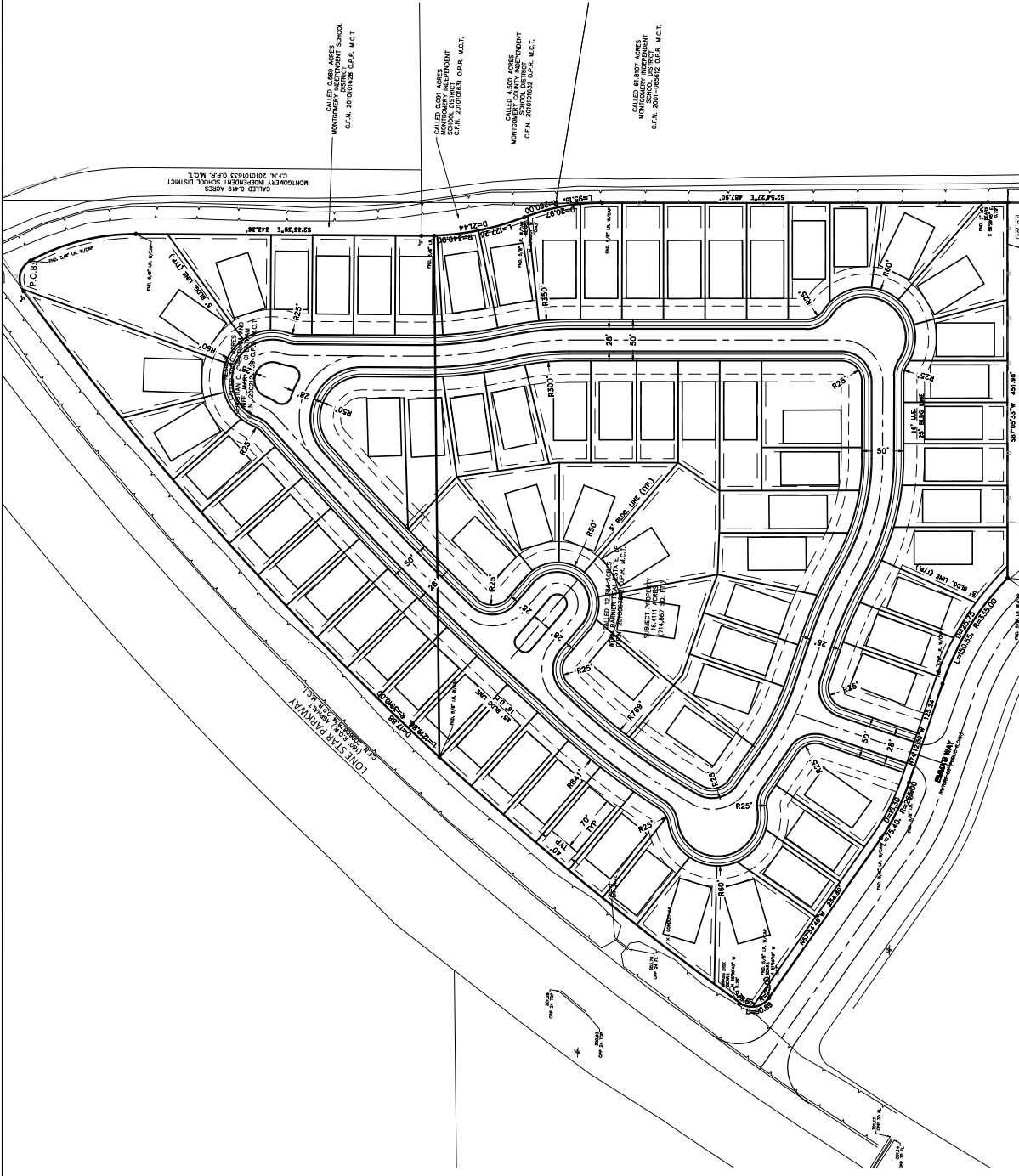
SQUARED ENGINEERING  
MUNICIPAL COMMERCIAL RESIDENTIAL  
WWW.SQUAREDENGINEERING.COM  
11111 W. 100TH STREET, SUITE 100  
OVERLAND PARK, MISSOURI 66204  
TEL: 816.425.4200 FAX: 816.425.4201

# HILLS OF TOWN CREEK NEW SITE EXHIBIT

DATE: 11/08/2021	DESCRIPTION: DEVELOPMENT	PROJECT: 10000 TOWN CREEK	SHEET: 1
SCALE: 1"=100' (P&R) 1"=200' (LIMIT)	MEASUREMENT: METRIC	STATUS: PRELIMINARY	NOT FOR CONSTRUCTION

THIS DOCUMENT IS ISSUED AS THE PROPERTY OF SQUARED ENGINEERING. IT IS NOT TO BE REPRODUCED, COPIED, OR TRANSMITTED IN ANY FORM OR BY ANY MEANS, WITHOUT THE WRITTEN PERMISSION OF SQUARED ENGINEERING. THIS DOCUMENT IS NOT FOR CONSTRUCTION.

±0.13 AC. LOTS  
TOTAL 72 LOTS  
16.45 ACRE SITE  
±2.712 LF PAVEMENT



Montgomery Planning and Zoning Commission  
**AGENDA REPORT**

<b>Meeting Date:</b> 12/07/2021	<b>Budgeted Amount:</b>
<b>Department:</b> Administration	<b>Prepared By:</b> Dave McCorquodale

**Subject**

Consideration and possible action regarding a Preliminary Report and calling Public Hearings for a rezoning request from R1—Single-Family Residential to B—Commercial for 14855 N. Liberty Street, Montgomery, Texas.

**Recommendation**

Discuss the request and what details to include in the Preliminary Report and call two Public Hearings to be held on January 4, 2022 at Montgomery City Hall beginning at 6:00 PM.

**Discussion**

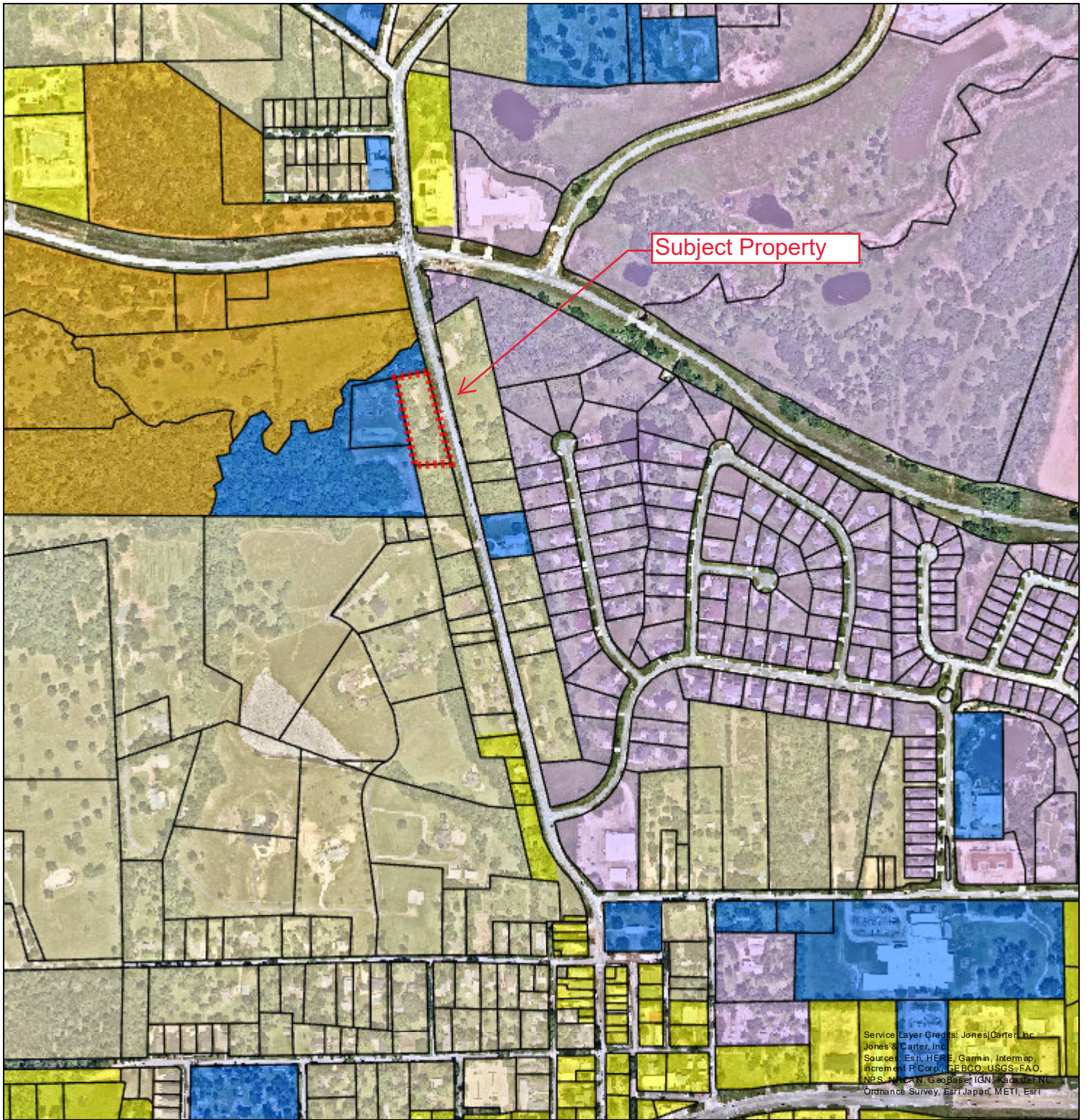
As you may know, the Easleys own the small brick home at the bottom of the hill on FM 149 North roughly across from the large propane tanks between downtown and Lone Star Parkway. The City’s old sewer plant sits on a roughly 10-acre parcel to the west behind the Easley property. While currently inactive, the City may bring the facility back online in the coming years to accommodate development on the west side of the City. The property is identified as future commercial on the City’s (unadopted) Future Land Use Plan. An aerial exhibit is attached for reference.

The rezoning process (and any other amendments to a city’s zoning regulations) is established by state law and requires local governments to provide opportunity for public input on rezoning requests. Accordingly, both the P&Z and City Council hold Public Hearings, and the P&Z submits a Final Report to the City Council before they act on the request. Tonight’s action is to conduct an initial study of the request and to schedule the Public Hearings. The Final Report and Recommendation will be discussed following the Public Hearings in January.

**Approved By**

Asst. City Administrator	Dave McCorquodale	Date: 12/01/2021
City Administrator	Richard Tramm	Date: 12/01/2021





Service Layer Credits: Jones|Carter, Inc.  
Jones & Carter, Inc.  
Sources: Esri, HERE, Garmin, Intermap,  
increment P Corp., GEBCO, USGS, FAO,  
NPS, NRCAN, GeBCO, IGN, Kadaster NL,  
Ordnance Survey, Esri Japan, METI, Esri

1 inch equals 752 feet

**Zoning Legend**

-  Residential (R-1)
-  Commercial (B)
-  Institutional (I)
-  Planned Development (PD)
-  Industrial (ID)



Date: 12/1/2021





# Rezoning Application

City of Montgomery  
101 Old Plantersville Road  
Montgomery, Texas 77316  
(936) 597-6434

**Upon completion return application to [dmccorquodale@ci.montgomery.tx.us](mailto:dmccorquodale@ci.montgomery.tx.us)**

### Contact Information

Property Owner(s): Arnette Easley & Sherry Easley

Address: 15275 N Liberty Montgomery

Zip Code: 77356 Phone: (936) 718-7860

Email Address: ArnetteEasley@aol.com

Applicants: Arnette Easley & Sherry Easley

Address: \_\_\_\_\_

Zip Code: \_\_\_\_\_ Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Parcel Information

Property Identification Number (MCAD R#): R434507

Legal Description: A0031 - Rigby Ben J. Tract 47, 47-A, Acre 1.5

Street Address or Location: 14855 North Liberty Montgomery TX 77356

Acreage: 1.5 Present Zoning: Residential Present Land Use: Residential

Proposed Zoning: Commercial Proposed Land Use: \_\_\_\_\_

Is the proposed use in compliance with the Future Land Use Plan?  YES  NO

### Additional Information

Owner(s) of record for the above described parcel:

Signature: Arnette Easley Date: 10-18-2021

Signature: S/Casley Date: 10-18-2021

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Note: Signatures are required for all owners of record for the property proposed for Special Use Permit. Attach additional signatures on a separate sheet of paper.*

<h2>Date Received</h2> <p>Office Use</p>	
--	--

**1.500 ACRES  
BENJAMIN J. RIGSBY SURVEY, A-31  
MONTGOMERY COUNTY, TEXAS**

Being a 1.5000 acre tract situated in the Benjamin J. Rigbsby Survey, Abstract Number 31, in Montgomery County, Texas, consisting of:

All that certain called 0.5 acre tract conveyed to Robert Young and wife, Martha Young in Deed recorded in Volume 618, Page 125 Deed Records of Montgomery County, Texas, and

All that certain called 1.0 acre tract conveyed to Robert L. Young, III and William L. Young, in Deed recorded under Clerk's File Number 2013010579 Official Public Records of Montgomery County, Texas (O.P.R.M.C.T.);

Said 1.500 acres being more particularly described by metes and bounds as follows with all bearings and coordinates referenced to the Texas Coordinate System, Central Zone, NAD 83, all distances and coordinates are ground:

**BEGINNING** at a chain link fence corner post, found for the Northwest corner of the herein described tract and Northwest corner of the called 0.5 acre tract, located at the Northeast corner of a called 2.0 acre tract conveyed to the City of Montgomery (no recording found) and being located in the Northerly South boundary of that certain called 8.40 acre tract, conveyed to the City of Montgomery, recorded under Clerk's File Number 8701042 O.P.R.M.C.T.; said corner having a coordinate value of North 10,139,052.990 and East 3,757,007.551;

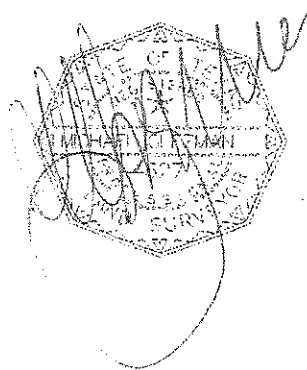
**THENCE** North 74°58'12" East, a distance of 146.22 feet along the South line of the called 8.40 acre tract, to a 5/8 inch iron rod with a survey cap marked "Glezman, R.P.L.S. 4627", set for the Northeast corner of the herein described tract, located in the West line of Liberty Street (F. M. 149), an 80 foot wide right-of-way recorded in Volume 391, Page 337 Deed Records of Montgomery County, Texas;

**THENCE** South 17°12'34" East along Liberty Street and the East line of the called 0.5 acre tract, passing at 147.47 feet, a 5/8 inch iron rod with survey cap, set for the Southeast corner of the called 0.5 acre tract and the Northeast corner of the called 1.0 acre tract; continuing along Liberty Street, a total distance of 433.49 feet, to a 5/8 inch iron rod with survey cap, set for the Southeast corner of the called 1.0 acre tract and Southeast corner of the herein described tract;

**THENCE** South 74°58'12" West, a distance of 155.46 feet along the South line of the called 1.0 acre tract and the North line of a tract of land, now or formerly deeded to Mount Sanai Baptist Church (ne deed found), to a 5/8 inch iron rod with survey cap, set for the Southwest corner of the herein described tract, located in the East line of the aforementioned called 8.40 acre tract;

**THENCE** North 15°59'22" West along the East line of the called 8.40 acre tract, passing at 113.40 feet, passing a 1/4 inch iron rod, found for the lower Northeast corner of the called 8.40 acre tract and the Southeast corner of called 2.0 acre tract, continuing along the East line of the City of Montgomery tract, a total distance of 433.23 feet, back to the Point of Beginning and containing 1.500 acres of land, based on the survey and plat prepared by Michael Glezman, R.P.L.S., dated November 28, 2020.

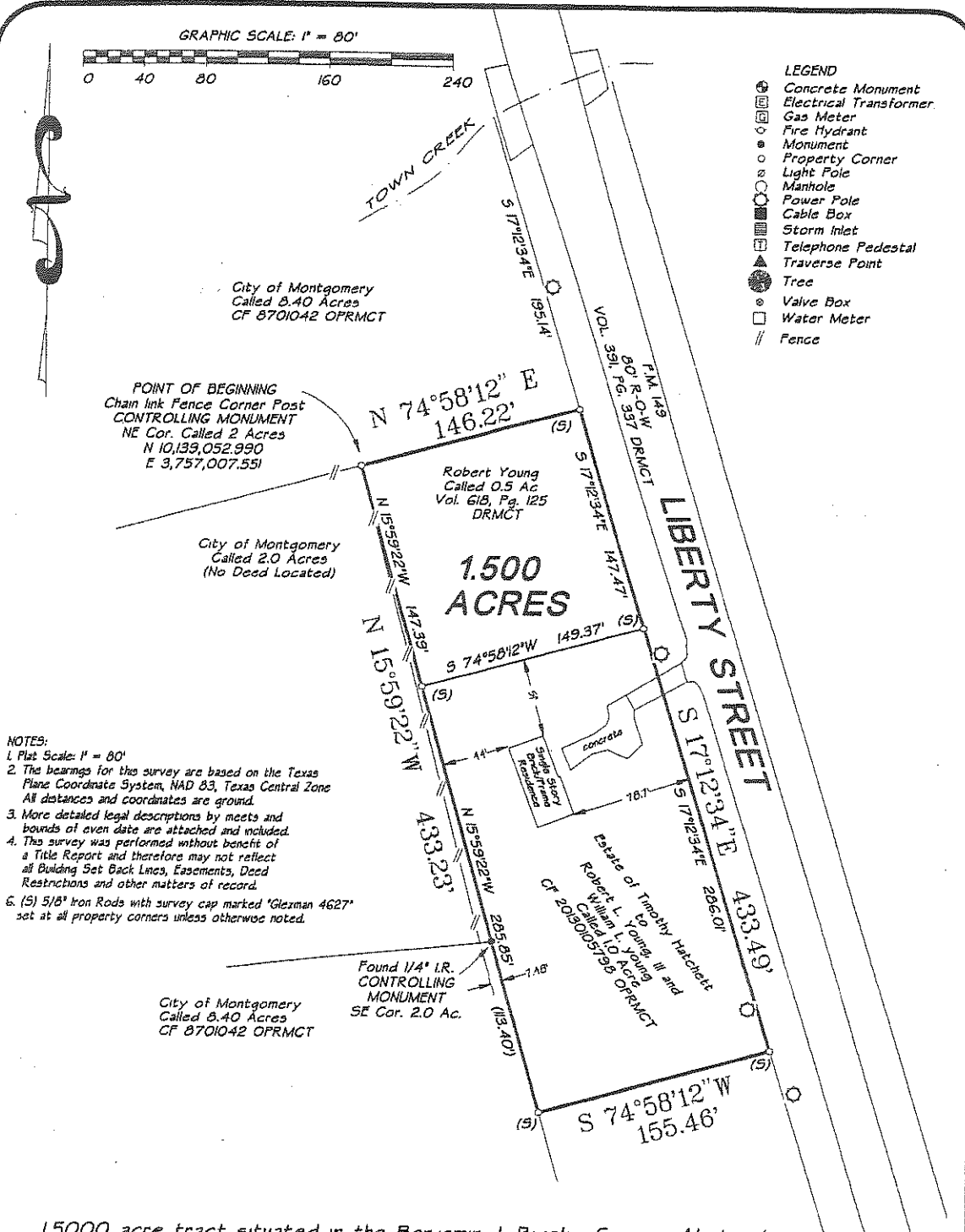
Michael Glezman  
Registered Professional Land Surveyor  
Texas Registration No. 4627



Date: November 30, 2020  
GC 20-0012-102920



- LEGEND**
- ⊕ Concrete Monument
  - ⊞ Electrical Transformer
  - ⊞ Gas Meter
  - ⊞ Fire Hydrant
  - ⊙ Monument
  - ⊙ Property Corner
  - ⊙ Light Pole
  - ⊙ Manhole
  - ⊙ Power Pole
  - ⊙ Cable Box
  - ⊙ Storm Inlet
  - ⊙ Telephone Pedestal
  - ▲ Traverse Point
  - Tree
  - ⊙ Valve Box
  - ⊞ Water Meter
  - // Fence



- NOTES:**
1. Plat Scale: 1" = 80'
  2. The bearings for this survey are based on the Texas Plane Coordinate System, NAD 83, Texas Central Zone. All distances and coordinates are ground.
  3. More detailed legal descriptions by meets and bounds of even date are attached and included.
  4. This survey was performed without benefit of a Title Report and therefore may not reflect all Building Set Back Lines, Easements, Deed Restrictions and other matters of record.
  5. (S) 5/8" Iron Rods with survey cap marked "Glezman 4627" set at all property corners unless otherwise noted.

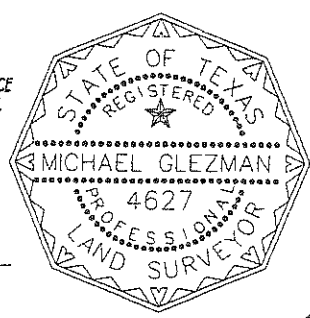
1.5000 acre tract situated in the Benjamin J. Rigsby Survey, Abstract Number 31, in Montgomery County, Texas, consisting of: All that certain called 0.5 acre tract conveyed to Robert Young and wife, Martha Young in Deed recorded in Volume 618, Page 125 Deed Records of Montgomery County, Texas, and All that certain called 1.0 acre tract conveyed to Robert L. Young, III and William L. Young, in Deed recorded under Clerk's File Number 2013010579 Official Public Records of Montgomery County, Texas (O.P.R.M.C.T.)

SURVEY DATE: November 28, 2020  
 GC20-0012-102920  
 14855 LIBERTY STREET  
 MONTGOMERY, TEXAS 77356

I HEREBY CERTIFY THAT THIS SURVEY SUBSTANTIALLY COMPLIES WITH THE CURRENT TEXAS SOCIETY OF PROFESSIONAL SURVEYORS MANUAL OF PRACTICE REQUIREMENTS FOR A CATEGORY 1A, CONDITION 3 TSPS LAND TITLE SURVEY.

GLEZMAN CONSULTING  
 TBP/ELS FIRM NO. 10194587  
 18215 LONG KEY DRIVE  
 CYPRESS, TEXAS 77433  
 936.499.1035  
 mglez2@aol.com

*(Signature)*  
 MICHAEL GLEZMAN, R.P.L.S. 4627





**NOTICE OF CONFIDENTIALITY RIGHTS: IF YOU ARE A NATURAL PERSON, YOU MAY REMOVE OR STRIKE ANY OR ALL OF THE FOLLOWING INFORMATION FROM ANY INSTRUMENT THAT TRANSFERS AN INTEREST IN REAL PROPERTY BEFORE IT IS FILED FOR RECORD IN THE PUBLIC RECORDS: YOUR SOCIAL SECURITY NUMBER OR YOUR DRIVER'S LICENSE NUMBER.**

**WARRANTY DEED**

**Date:** October 13, 2020

**Grantor:** ROBERT LEE YOUNG III, a/k/a ROBERT L. YOUNG, III and wife, DEANN YOUNG

**Grantor's Mailing Address:**

14855 Liberty Street  
Montgomery, Montgomery County, Texas 77356

**Grantee:** ARNETTE EASLEY and wife, SHERRY EASLEY

**Grantee's Mailing Address:**

12871 Capricornus  
Willis, Montgomery County, Texas 77318

**Consideration:** TEN AND NO/100 DOLLARS (\$10.00) and other valuable consideration

**Property (including any improvements):**

TRACT ONE:

0.5 acres of land in Montgomery County, Texas, from the B. Rigby Survey, A-31, Montgomery County, Texas, as shown by metes and bounds in deed recorded in Vol. 618, Page 125, Official Public Records, Montgomery County, Texas

TRACT TWO:

Grantor's 50% undivided interest in A0031 Rigsby Ben J, Tract 47, consisting of 1.0 acres

said 1.0 acre being that certain 1.5 acres described in Volume 122 Page 519, Montgomery County Deed Records SAVE AND EXCEPT that certain .5 acres described above as TRACT ONE.

**NOTICE OF CONFIDENTIALITY RIGHTS: IF YOU ARE A NATURAL PERSON, YOU MAY REMOVE OR STRIKE ANY OR ALL OF THE FOLLOWING INFORMATION FROM ANY INSTRUMENT THAT TRANSFERS AN INTEREST IN REAL PROPERTY BEFORE IT IS FILED FOR RECORD IN THE PUBLIC RECORDS: YOUR SOCIAL SECURITY NUMBER OR YOUR DRIVER'S LICENSE NUMBER.**

**WARRANTY DEED**

**Date:** February 24, 2021

**Grantor:** WILLIAM LANDRUM YOUNG, JR., a single man, and JALAN LANDRUM YOUNG, a single man, as heirs of WILLIAM LANDRUM YOUNG

**Grantor's Mailing Address:**

14855 Liberty Street  
Montgomery, Montgomery County, Texas 77356

**Grantee:** ARNETTE EASLEY and wife, SHERRY EASLEY

**Grantee's Mailing Address:**

12871 Capricornus  
Willis, Montgomery County, Texas 77318

**Consideration:** TEN AND NO/100 DOLLARS (\$10.00) and other valuable consideration

**Property (including any improvements):**

Grantor's 50% undivided interest in A0031 Rigsby Ben J, Tract 47, consisting of 1.0 acres

said 1.0 acre being that certain 1.5 acres described in Volume 122 Page 519, Montgomery County Deed Records SAVE AND EXCEPT that certain .5 acres described as 0.5 acres of land in Montgomery County, Texas, from the B. Rigby Survey, A-31, Montgomery County, Texas, as shown by metes and bounds in deed recorded in Vol. 618, Page 125, Official Public Records, Montgomery County, Texas

said 1.0 acres being more particularly described as follows:

Being a 1.000 acre tract situated in the Benjamin J. Rigsby Survey, Abstract Number 31, in Montgomery County, Texas, consisting of all that certain called 1.0 acre tract conveyed to Robert L. Young, III and William L. Young, in Deed recorded under Clerk's File Number 2013010579 Official Public Records of Montgomery County,

Montgomery Planning and Zoning Commission  
**AGENDA REPORT**

<b>Meeting Date:</b> 12/07/2021	<b>Budgeted Amount:</b>
<b>Department:</b> Administration	<b>Prepared By:</b> Dave McCorquodale

**Subject**

Presentation of a proposed business plan for The Caroline House Bed & Breakfast located at 811 College Street as submitted by DH BROW, LLC.

**Recommendation**

Listen to the presentation and provide feedback as you see fit.

**Discussion**

The Caroline House Bed & Breakfast is located in the Historic Preservation District and has been used as a bed & breakfast for a number of years. The property is listed for sale and prospective owners would like to discuss the idea of continuing the bed & breakfast and holding small (+/- 100 guests) events at the property.

The Caroline House is currently operating with a Special Use Permit which is required of any bed & breakfast in the City. To allow additional uses (like events) on the property, the SUP would need to be amended to include such uses.

The applicants want to share their idea with the P&Z and City Council to gauge whether the proposed expanded use of the facility would be supported by the City. The feedback you provide to the applicants, along with City Council’s feedback, should be aimed at helping the applicants determine next steps for them (i.e. making an offer on the property or knowing the City would not support this type of activity on the property). The applicants have provided additional information about their plan for review.

**Approved By**

Asst. City Administrator	Dave McCorquodale	Date: 12/03/2021
City Administrator	Richard Tramm	Date: 12/03/2021

## 1.0 Executive Summary

The Caroline House  
811 Caroline Street  
Montgomery, Texas 77356

### Introduction

The Caroline House is a one-of-a-kind property located in historic downtown Montgomery, Texas, currently operating as a top-rated Bed & Breakfast since 2006 by Mary Eckhart Sims. The Caroline House is currently on the market for sale as a turnkey Bed & Breakfast business.

### Our Services

There are three homes on the picturesque almost one-acre (.939) property which boasts mature trees and foliage. The main house, known as the Shelton-Smith House, was built in the late 1850s and holds a designation as a historic home with the state of Texas. The main home offers formal living and dining rooms, den, large eat-in kitchen, oversized laundry/mudroom, downstairs primary suite, upstairs primary suite with sitting area and a downstairs guest suite. The property also features an 1,800 sq. ft. three bed/two bath guest house and a 500 sq. ft. one bed/one bath historic slave quarters, known as the Cottage, located behind the main home. The Caroline House offers guests a “home away from home” experience while they explore historic downtown Montgomery or visit the surrounding attractions.

### Financial Considerations

DH BROW is a limited liability company (LLC has been filed and awaiting final approval) seeking the opportunity to purchase The Caroline House.

Upon acquiring the property, DH BROW will continue operating The Caroline House as a Bed & Breakfast offering temporary lodging and aims to uphold The Caroline House’s current reputation. In addition to the Bed & Breakfast, and after obtaining the required permits and city planning approval, DH BROW intends to expand the business model by becoming an event venue for intimate events with a maximum guest count of 100. (Exact guest count will be determined upon approval with an in-person visit by the necessary licensed professional. The guest count of 100 is used throughout this document as an estimated placeholder occupancy of 150 for exterior events, allowing room for staff and vendors) Examples of the proposed intimate events are: weddings, bridal showers, family reunions, memorials, corporate events, etc.

### Mission

DH BROW holds the mission to provide all guests of the property with a comfortable, enjoyable, and memorable experience that will result in guests wanting to return for years to come. The respect, preservation, and rich history of the property is one that will be shared with each guest.

## 2.0 Business Description

The Caroline House is a one-of-a-kind property located in historic downtown Montgomery, currently operating as a top-rated Bed & Breakfast since 2006 by Mary Eckhart Sims.

### 2.1 Location

The Caroline House is located at 811 Caroline Street in the historic district of Montgomery, Texas.



The Caroline House is:

- Walking distance to historic downtown Montgomery
- Walking distance to chain grocery stores and restaurants
- Minutes to popular wedding venues and wineries
- Minutes to Lake Conroe and numerous other recreational opportunities, including Sam Houston National Forest
- 15 minutes to Margaritaville Resort and Conference Center
- Approximately 20 minutes to Conroe
- Approximately 35 minutes to The Woodlands: Waterway Marriot Hotel & Convention Center, Cynthia Woods Mitchell Pavilion, Market Street, and The Woodlands Mall
- Approximately 50 minutes to George bush International Airport
- Approximately 1 hour to downtown Houston



## 2.2 Property History

John E. Shelton, a home builder, who built many of the homes in Montgomery, purchased the land The Caroline House sits on in 1855 for the total sum of \$400.00. In 1858, the property was put up for sale by the Montgomery County Sherriff where it would be purchased by Captain Thomas W. Smith for a total of \$425.00. Smith was a well-known merchant, civil servant, and had even served in the Confederate Army during the Civil War. Records suggest that Smith either added onto the home or built a new home prior to the Civil War. The home was known as the T. W. Smith home until Smith moved to Willis after the Great Northern Railroad company began to lay track that would connect Houston to Chicago in 1870. In 1872, Smith established the Smith & Co. Cigar Manufacturing Company in Willis. Descendants of Captain Smith retained ownership of the property until 1924 when they sold the home to Thomas and Edna Gay. The home was then sold to Ken and Mary Whisenant in 1970. The Whisenant family was successful in petitioning the Texas Historical Commission to designate the Shelton-Smith house as a Historical Marker in 1976.

Mary Eckhart, the current owner, who purchased the property in 2000 is only the fourth family to own the home throughout its history. Ms. Eckhart, an interior designer, has lovingly restored the home and buildings to its former glory. There are four structures on the property. The first being the main house which was originally a one story with three dormer windows and a long porch that spanned the width of the home. Captain Smith's granddaughter, Stella Peynghaus, extensively remodeled the home in 1921. Stella's improvements such as the beaver board walls and the replacement of some of the heart pine flooring with one-inch-thick maple are what continue to provide the home with a unique character. Today, the now two-story home boasts 3,200 square feet of quality living space that includes formal living and dining rooms, cozy den, large eat-in kitchen, two downstairs bedrooms with ensuite baths, an upstairs two-bedroom suite with bath and sitting room, an oversized laundry room, and a sunroom. The main house retains many original features, including heart pine and maple flooring, fireplaces, chimneys, ceilings, hardware, and other fixtures. The second structure is the former slave quarters that was converted into a small guest cottage featuring a living area, bedroom, and full bathroom. The third structure, a large greenhouse that was used to grow orchids for commercial purposes, was built in the 1970s by the Gay family. This was converted into a lodge-style guest house in 2003. This home features an expansive living and dining area, full kitchen, laundry room, two bathrooms, and three spacious bedrooms. The fourth and last structure located on the property is a two-car garage where one bay has been converted into a game room. Each year, the property has been featured in the "Christmas in Historic Montgomery Home Tour". This annual event allows the public to tour many of the historical homes in downtown Montgomery.

## 2.3 Current Property Layout

### Main House – Shelton-Smith House

- Built in 1858
- 3,200 square feet
- 3 bedrooms, 3 full baths/1 powder room
- Formal Living, Formal Dining, Den, and Sunroom
- Kitchen with Dining area
- Oversized laundry/mudroom
- Large front porch and concrete patio



### Guest House

- Build in the 1970s
- 1,800 square feet
- 3 bedrooms, 2 full baths
- Living and Dining areas
- Kitchen with dining area
- Laundry Room
- Large front porch



### Cottage

- Built in the 1850s
- 500 square feet
- 1 bedroom, 1 full bath
- Living and Dining area
- Front Porch



### Grounds

- Guest house has a large storage area that will be converted to onsite living quarters
- Two car garage – one bay has been converted to game room
- Mature trees surrounded by lush landscaping
- Plenty of room for relaxing or to be used for hosting events



## 3.0 Market Analysis

Montgomery, Texas has a population of 1,575 (as of 2019) but pulls visitors and guests from the surrounding areas, such as the city of Houston, which has a population of 2,323,660 (as of 2021).

The lodging industry has the benefit of not being dependent on any single market segment, but instead is able to welcome guests from several.



### 3.1 Segmentation and Target Market

The Caroline House's two major customer segments are those who are looking to "get away" from the city and enjoy a more relaxing lodging experience over the impersonal surroundings of hotels/motels and individuals from the surrounding communities looking for an intimate venue with lodging and charm for various events.

The Caroline House additionally appeals to the following market segments:

- Out of town tourists visiting Montgomery or the surrounding areas.
- Event and festival goers, ranging from events at Margaritaville to guests attending The Texas Renaissance Festival.
- Locals looking for a stay-cation.
- Wine lovers who are enjoying the Texas Bluebonnet Wine Trail or are staying to explore the local wineries at their own pace.
- History buffs who come to experience one of the oldest towns in Texas and the Birthplace of the Texas Flag.
- Brides and Grooms looking for an intimate wedding venue that offers charm, history, and lodging.
- Individuals looking to host an event or luncheon in a one of a kind and charming venue.

As Greater Houston continues to grow, Montgomery becomes an even more desirable destination with its charming downtown and surrounding attractions.

### 3.2 Market Needs

There is an overall need in the Montgomery area for lodging. The Bed & Breakfast industry offers a comfortable lodging option for the ever-increasing group of travelers. Guests are welcomed into a home where they can feel a sense of community while still allowing for as much privacy as they desire to create an enjoyable and relaxing stay.

The Montgomery, Texas official government website lists Cedar Brake Park, Community Building, Memory park, and Hodge Podge Lodge as the only facilities on their "Plan an Event" page. While there are additional event venues in the surrounding area, The Caroline House offers walking distance to historic downtown Montgomery as well as lodging. The Caroline House offers outdoor and indoor space for those looking for a venue space for an intimate sized event.

## 4.0 Services

The Caroline House will be run with authentic Southern hospitality to provide guests with lodging while visiting and experiencing the historic wonders of Montgomery, Texas.

### 4.1 Bed & Breakfast

Guests will be able to choose a traditional Bed & Breakfast room with shared living room and dining room areas where they will be "part of the family" or select a more modern Bed & Breakfast approach and rent the Guest House or Cottage where they will have the house to themselves. Either selection gives guests access

to the relaxing gardens that are surrounded by lush greenery that makes you forget you are in the middle of town.  
need.

**4.2 Events**

Each client will have an Event Manager for planning and day of. There will never be two events booked on the same day, giving guests time to set up, prepare, enjoy, and tear down without the worry of another event on top of them.

Efforts will be taken by The Caroline House to respect the surrounding residence, city operational hours as well as the city noise ordinance.

To allow space for event parking, one option being proposed is converting the west portion of the lawn into event parking. This will consist of adding a gate to the existing fence. The gate and parking area will only be open and used for events held at the Caroline House.



Created by Michelle Plaskett, November 28th, 2021. Source: Tax Parcel View (8/11/2021), ESRI Feature Service Layer, GIS\_Data\_MOCCO, Accessed 11/28/2021, Aerial2017\_6inch\_RGB(6/15/2017), ESRI Feature Service Layer, GIS\_Data\_MOCCO, Accessed 11/28/2021.

**4.3 Proposed Additional Revenue Streams**

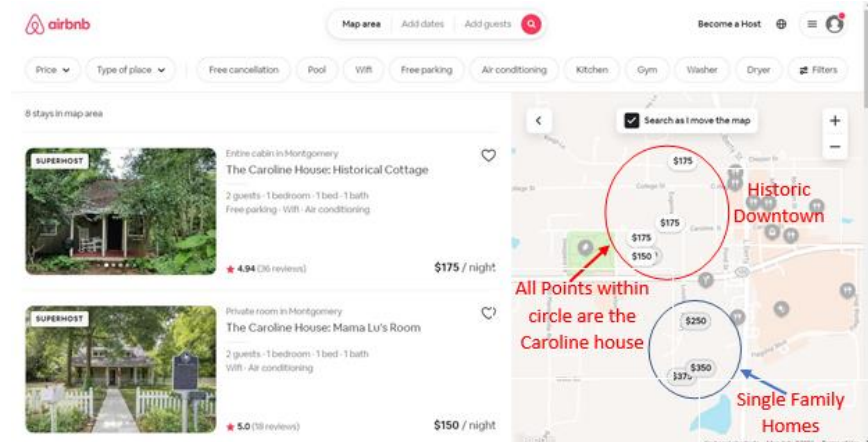
Other revenue streams, in addition to the Bed & Breakfast and event venue, will be considered in the future. This will consist of, but are not limited to, a gift shop of branded items and locally sourced items, and guided historic tours of Montgomery.

**4.4 SWOT Analysis**

**4.4.1 Strengths**

- Location: The Caroline House is located within walking distance to historic downtown Montgomery with eating establishments, local boutiques and downtown festivals; a short driving distance to nearby attractions such as multiple local wineries, The Texas Renaissance Festival, Margaritaville, Lake Conroe, Sam Houston National Park and Huntsville State Park; driving distance to The Woodlands and Houston attractions.
- Historic property: The Caroline House is a historic landmark. This allows marketing to a specific segment that is interested in staying and/or visiting historic properties.
- Lodging demand: Currently, there is only one other Bed & Breakfast, Hodge Podge Lodge, within the immediate area (1-mile radius) that offers single room lodging. According to the current owner, Hodge Podge Lodge sends its overage to The Caroline

House. Within a 4-mile radius, there are three other options for single room lodging. Other options in the downtown area, such as entire single-family residential homes for a nightly or weekly rate, are available, however, the cost is more significant and they are not within easy walking distance to downtown Montgomery. Most are found on [www.airbnb.com](http://www.airbnb.com) (in blue circle). The Caroline House rooms can also be found on the site (in red circle).



The need for lodging puts The Caroline House in a strong position to succeed as it is one of the only lodging opportunities for single rooms in the area.

- Increase in tourism for Montgomery: Montgomery is one of the oldest towns in Texas. Guests will be given the opportunity to learn the charm of Montgomery's history and what makes the Birthplace of the Texas Flag so special.
- Turnkey Bed & Breakfast: The Caroline House is being sold as an established business with the majority of the furniture remaining with the house.
- Online/Social media presence: The internet and social media outlets will be utilized to market and advertise The Caroline House. There will be a focus on gaining guest reviews and positive referrals.
- Event venue: With a demand for smaller venues in the downtown Montgomery area, The Caroline House will fill the need and become a popular destination for small intimate events.

#### 4.4.2 Weaknesses

- Novice Bed & Breakfast owners: While professional and knowledgeable, the management team will be new to the Bed & Breakfast industry.
- Aging property: Being built in the 1850's, The Caroline House will need routine repairs and upkeep in order to remain at its full potential.

- Unproven event history: The Special Use Permit has not been used for The Caroline House in many years. While this was due to personal choice of the current owner and not lack of interest, it is not currently established or known as an event facility.
- Parking: A lack of large parking area may prohibit events. The City's approval of event space and proposed parking plan is critical.
- Local/State/Federal Regulations: The initial task of obtaining necessary permits to run the business.
- Time/Days of operations: Will have to operate within the City's defined operating hours and within the City's noise ordinance.

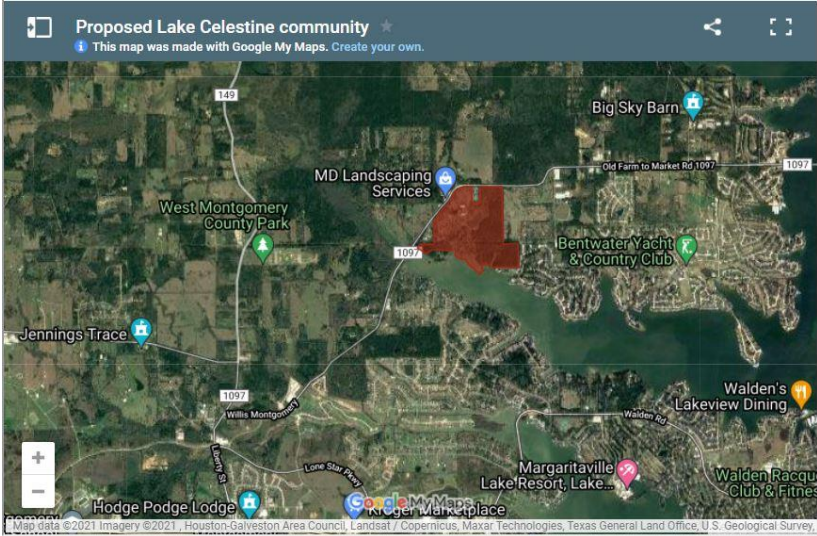
#### **4.4.3 Opportunities**

- Additional bedroom for rent: Growth will naturally occur in the Bed & Breakfast by opening the additional bedroom in the Main House as a rental option.
- Event venue: The property offers a lush garden area ideal for intimate events as well as sufficient space indoors to host small sit-down events, such as luncheons.
- Increased online marketing: With little online marketing currently being utilized for The Caroline House, there are ample opportunities to grow the online marketing.
- Refresh the property: Over the years, the outdoor gardens have become overgrown and will be refreshed. The inside of The Caroline House will also be evaluated and refreshed.
- Expanding other avenues of business: In the future, additional avenues such as historical tours, cemetery tours, bicycle tours, and wine tastings will be considered. In addition, having the branded items and locally sourced and handmade products available for purchase at The Caroline House for guests will promote the brand as well as local small businesses.

#### **4.4.4 Threats**

- City priorities: If the city of Montgomery changes the vision of downtown Montgomery, the need for a Bed & Breakfast and intimate event venue will be threatened.
- Unknown maintenance: As with any building, especially a historical building, there will be unknown maintenance required.
- COVID19: Travel and the lodging industry were put on pause for nearly a year and a half. While travel is currently increasing and life is beginning to look more like "normal", the future of COVID19 is ever changing and unknown.

- Lodging: Area growth may result in more lodging options such as hotels, RV Parks, and AirBnBs. An example is the proposed Lake Celestine development that will call for 1,038 residential lots as well as lakefront restaurants, retail stores, live-work units, creative office space, lakefront hotel and recreational amenities.



**4.5 Regulations**

- 4.5.1 State Permits**  
Business License – actively obtaining LLC to run the business  
Liquor License/Permit
- 4.5.2 City Permits**  
Special Use Permit (Bed & Breakfast and Events)  
Noise Ordinance
- 4.5.3 County Permits**  
Health/Food Safety  
Occupancy
- 4.5.4 Federal**  
ADA compliant
- 4.5.5 Insurance**  
Must have appropriate insurance to lessen risks of liability and lawsuits

**5.0 Management & Organization Structure**

**5.1 Management Team**

Individual Resumes for the management team can be found on pages 11-18.

**Craig Ivie:** Duties include overseeing the operations of the business and ensuring that all members of the team meet business goals. In addition to ensuring smooth business operations, he will participate in landscaping duties, general maintenance, event setup and tear down, and act as a guest advocate.

**Jamie Ivie:** Mrs. Ivie will supervise the overall guest experience and assist in preparing breakfast, housekeeping, and administration. She will assist in event setup and tear down.



**Michelle Plaskett:** Mrs. Plaskett’s duties will include overseeing and implementing all marketing strategies as well as overseeing daily accounting needs. She will also participate in cleaning, landscaping, and maintenance duties.

**Danielle Ivie:** Ms. Ivie will oversee client relationships from start to finish for each event. Ms. Ivie will live on-site for any guest needs and will assist in cleaning, landscaping and all other daily duties.

**5.2 Professional Team**

Additional help from professionals (i.e. Attorney, Accountant, Landscaper, Insurance Agent) will be utilized to ensure successful operations as needed.

**6.0 Financial Plan**

**Start-up Funding**

DH BROW is seeking a loan to finance the purchase of The Caroline House, a Bed & Breakfast located at 811 Caroline Street, Montgomery, Texas 77356. DH BROW will contribute a down payment that will be applied to the purchase price, required permits, and associated closing costs. In addition, DH BROW will be seeking a construction loan to cover costs associated with the business model expansion. These costs include:

- Converting the storage area adjacent to the Guest House into living quarters for the on-site manager.
- Converting lawn on the west side of the property into additional parking (relocating electric pole).
- Enhancement of the grounds which will include landscaping and fence repair.
- Acquiring appropriate furniture and fixtures to be used to host events.
- Security system to include cameras and doorbells.



Created by Michelle Plaskett, November 28th, 2021. Source: Tax Parcel View (6/11/2021). ESRI Feature Service Layer. GIS\_Data\_MOCO. Accessed 11/28/2021. Aerial2017\_6Inch\_RGB(6/15/2017). ESRI Feature Service Layer. GIS\_Data\_MOCO. Accessed 11/28/2021.

**7.0 Transition**

The current owner, Mary Eckhart Sims, has expressed interest in assisting with a successful transition of business. This will include training in the Bed & Breakfast room booking software, education in the historical traits of the house, and day to day tips that she has learned over the years.

## CRAIG R. IVIE

14594 Hillshire, Willis Texas, 77318  
[Craig.ivie@gmail.com](mailto:Craig.ivie@gmail.com) | 713-962-4839

### Executive Management

#### Strategic Planning – Product Development – Organizational Execution

Accomplished Executive with domestic and international experience in Operations, P&L oversight, Product Development, Research, Manufacturing and new product growth. Results orientated, decisive leader with 25 years of proven success in leading teams towards common goals. Track record of creating an organizational culture where Safety and investing in employee training and career growth ultimately decrease employee turnover rates. Managed a strong team of Executives towards market growth and the diversification of standard products into new markets while improving daily operational efficiency.

#### Areas of Expertise

Leadership	Communication	Margin Improvement
Integrity	Organizational Execution	QHSE Performance
Budget/Forecasting	Product Development	Operational Execution
Collaborative Work Environment	R&D	

#### Professional EXPERIENCE

- **President & CEO** (BOS Solutions) 11/2015 – 9/1/2020  
Ultimate responsibility for the health, and safety of all employees, the development and implementation of strategic plans, budgets and the growth of the business for ensuring the financial and operational health of the corporation.
  - Managed a company of 500+ employees to a Revenue of over \$200M and EBITDA margin improvement by exceeding customer expectations in value, service quality and equipment performance.
  - Improved overall HSE performance and reduced injury rate (TRIR) from 1.5 to 0.2 by creating a positive Safety-First Culture
  - Managed the organization to an annual EBITDA increase of \$8.7 million from a \$15.3 million increase in Revenue (57% incremental margin improvement while maintaining market share)
  - Slashed field turnover rate from 40+% to 16% by putting competency, fixed pay rates, and career progression in place for employees.
  - Grew US market share from 4% to over 11% by focusing on customer needs and the companies organizational strengths.
  
- **Vice President Operations** (BOS-Solutions) 3/2012 – 11/2015  
Accountable for the growth and profitability of all BOS Operations while maintaining budgetary discipline. Provide mentorship to Operational Managers and worked to foster their management skills development. Worked closely with the VP of Sales and Marketing to develop and execute strategic actions to support the BOS business development process.
  - Upheld compliance with OSHA, labor laws, federal and local agencies and customer requirements leading 600+ personnel working on 180+ job sites.
  - Lowered the standard cost of equipment repair by 20%



- Extended equipment run life by 25% using robust R&M practices
- Managed the growth of the company by opening two new US District Offices
- **Director Engineering** (NOV Downhole) 1/2010 – 2/2012  
Working with a very dedicated staff of engineers and designers to maintain the robustness of our products. Activities include monitoring product reliability, working with the sales and manufacturing teams and our Product Line managers on all product offerings. This includes downhole motors, bits, drilling jars, hole opening, fishing tools, coring and other drill string components. Duties are also carried out with the desire to expand the capabilities and performance of our current product offerings and to also look outside the box for disruptive technologies that could be game changing.
  - Duties included:
    - Managed the process of bringing 5 new products to market.
    - Increased product Reliability by over 30% through stronger operational procedures and training.
    - Increased the overall input of patent applications from engineering groups by 50%
    - Developed and implemented a strategy around increased communication between engineering and sales teams through web-based seminars
- **Vice President Engineering** (Grant Prideco) 2008 - 2010  
Managed a department of over 220 people with an annual budget of \$28M. Departments included Product Line Support, Metallurgy, Manufacturing Engineering, Product Development and Research. Employees were in Singapore, Stonehouse, UK and Houston.
  - Duties included:
    - Full Budget responsibilities
    - Facilitated technical knowledge transfer across an organization of several hundred product lines
    - Managed and monitored engineers on projects within R&D from testing to market.
    - Creating Manufacturing standards for Domestic and International sites
      - Realized a 10% reduction in manufacturing cost
    - Development and Introduction of a Downhole Dynamic monitoring sub.
      - This product eventually grew into a standalone business within NOV.

### **Additional Experience:**

Research Manager – Schlumberger/ReedHycalog  
Supervisor Research Labs – ReedHycalog  
Product Engineer - ReedHycalog

### **Education and Technical Experience**

- BS Engineering from the Montana College of Mineral Science and Technology, Butte Montana
- Inventor on 5 patents – US7168506, US5096005, US494099, US6802215, US5029656

**REFERENCES:** Available on request

## Jamie Ivie

Willis, TX 77318

(713) 569-4876 | jamie.ivie@yahoo.com

### Professional Summary

Committed to inspiring personal drive and self-confidence through motivational training and skills development. Employs example-based instruction style to build trust as hands-on leader and guarantee safety of activities. Believes in open, constructive communication between staff and team to set clear goals and build vision of excellence.

### Skills

Motivation

Management

Community driven

Planning and Leadership

Creativity and Flexibility

Project organization

One-on-One Instruction

Individualized Coaching

### Professional Experience

- **Head of Neighborhood Women's Group September 2013 - Current**  
 Bridgepoint Subdivision Willis, TX
  - Coordinated special events such as Fall Festival and Easter picnic.
  - Organize volunteers
  - Offered age-appropriate, fun and educational activities for children.
  - Used coordination and planning skills to achieve results according to schedule.
  - Participated in team-building activities to enhance relationships.
  - Conducted research, gathered information from multiple sources and presented results.
  - Organized and managed events and projects as part of community.
  - Planned and delivered numerous activities and special events for community.
  - Assisted with special events or programs.
  - Developed monthly schedules and assignments for community.
  - Supported engaging, fun and smooth-running events by helping with organization and planning.
  - Coordinated food, clothing and household items for disadvantaged individuals and families.
  - Met with other volunteers to discuss new opportunities.
  - Sent email reminders regarding upcoming volunteer events to community leaders
  
- **District Volunteer Coordinator August 2008 - May 2009**  
 Klein Independent School District Klein, Texas
  - Managed volunteer calendar and verified coverage of key roles during volunteer unavailability.
  - Evaluated strengths of team members and assessed vacancies to match volunteers with positions.
  - Coordinated logistics of scheduling, supplying and transporting volunteers.
  - Worked with leadership staff and special committees to define volunteer mission and set standards.

- Uncovered opportunities for volunteer program improvement by soliciting staff feedback and evaluating volunteer performance.
  - Recruited and trained new volunteers on volunteer program goals and objectives.
  - Volunteered to help with special projects of varying degrees of complexity.
- **Church of Jesus Christ Of Latter Day Saints      January 1995 - September 2007**  
Klein, Texas Young Woman Leader
    - Mentored and supervised instructors and volunteer staff to carry out program goals.
    - Adapted classroom plans to support needs of children with special learning requirements.
    - Sourced, modified and prepared class curricula and targeted lesson plans based on subject matter requirements.
    - Analyzed revenue and program cost data to determine budget priorities.
    - Kept program children safe and secure at all times with proactive monitoring strategies.
    - Identified and recruited potential volunteer workers.
    - Prepared, coordinated and distributed information about yearly schedule of activities and classes.
    - Led young women in delivery of leadership project roles.
    - Worked to maintain outstanding attendance record, consistently arriving to work ready to start immediately.
    - Used coordination and planning skills to achieve results according to schedule.
    - Maintained energy and enthusiasm in fast-paced environment.
    - Supervised work of adult volunteers to keep on task for timely completion.
  - **Church of Jesus Christ Of Latter Day Saints      February 1995 to September 2000**  
Klein, Texas Young Woman Sports Director
    - Remained highly composed and calm in very fast-paced, stressful and constantly changing environments to provide optimal leadership and achieve desired results.
    - Developed schedules for volleyball and basketball games for numerous teams  
Developed project budgets and managed costs.
    - Coached young women in volleyball and basketball Organized and ran tournament brackets

## **Education**

High School Diploma - Granite High School May 1982

Philipsburg, MT

## Michelle Davis Plaskett

14572 Hillshire Drive ● Willis, TX 77318 ● 936-788-4962

[michelle.plaskett@Outlook.com](mailto:michelle.plaskett@Outlook.com)

### Education

**Sam Houston State University** – Huntsville, TX May 2020

*Master of Science, Geographic Information Systems*

- Institutional GPA: 4.0
- Course Work:
  - Geographic Information, GIS Principles and Applications, Internet GIS, Spatial Analysis, Digital Image Processing, Cartography and Visualization, Energy GIS, Introduction to GPS, Lidar, and Radar, GIS Project Management, GIS and Law Enforcement, and Model Builder.

**Sam Houston State University** – Huntsville, TX December 2014

*Bachelor of Arts, Double Major in Geography and History*

- Concentration in Cultural Geography
- Institutional GPA: 4.0 Cumulative GPA: 3.84
- Magna Cum Laude

### Work Experience

**Better Homes and Gardens Real Estate Gary Greene** – Willis, TX May 2005 - Present

*Licensed Texas Real Estate Agent/Real Estate Investor*

- Licensed Texas Realtor since May 2005 with over 450+ education hours (License #0536875)
- Assists buyers and sellers achieve their real estate goals
- Possesses knowledge of the local real estate market and negotiating/communication skills
- Utilizes GIS software extensively to locate and value real estate to save time/money
- Used knowledge and skills to acquire income producing debt free real estate investment portfolio (12 single family residential homes)
  - Acts as a property manager for investment portfolio
    - Prepares and executes leases
    - Collects monthly rent
    - Uses Excel to maintain expense and income accounting
    - Maintains properties
    - Communicates/interacts with clientele and tradesmen

**Transaction Coordinator/Freelance Graphic Designer** – Willis, TX 2007 - Present

*Oversees Transactions /Designs Marketing Material*

- Primarily works for the Baudat Hildenbrandt team members a transaction coordinator
  - Oversees all aspects of transactions for buyers and sellers from first contact to close of contract
  - Prepares listing materials such as listing presentations, listing agreements, and inputs listings into MLS, subscription websites, and social media outlets
  - Ensures all documents have appropriate signatures

- Generates Commission Disbursement Authorizations and Funding Requests
- Designs and distributes marketing materials for Baudat Hildenbrandt Team members
  - Uses creative writing skills to market properties via numerous outlets
  - Past project designs include: postcards, flyers, trifolds, signs, social media ads, and videos
  - Utilizes Montgomery County Appraisal District GIS software to determine best marketing strategies/areas

## **Volunteer Work and Community Involvement**

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### **Bridgepoint Community – Willis, TX** 2014 - Present

- Designed and maintained property owner’s association website for several years
- Collected information for/designed neighborhood directory
- Co-founder of Bridgepoint Ladies Organization
  - Helps host neighborhood events – Easter Picnic, Fourth of July Fireworks, Fall Festival, and monthly ladies’ gatherings

### **Literacy Volunteers of America – Conroe, TX** Spring 2016

- Taught speakers of foreign languages in a group setting basic English with an emphasis on listening, reading, writing, speaking, and communication skills
- Completed tutor training for Adult Basic Education (ABE) and English as a Second Language (ESL)

### **Path to American Citizenship – Nestor Fitz** September 2016 - April 2017

- Individually assisted long standing green card holder pass the naturalization exam
- Taught student several hours per week to prepare for the civics, history, reading, writing, and English-speaking portions required to pass the naturalization exam
- Student successfully passed exam on April 13<sup>th</sup>, 2017 and became a United States citizen on April 26<sup>th</sup>, 2017

## **Skills**

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### **Software:**

- ArcGIS, Google Maps/Earth, and Microsoft Streets and Trips
- Microsoft Office products: Windows, Word, Excel, Power Point, Publisher, Outlook, and Internet Explorer
- Adobe Photoshop CS4 and Acrobat Pro
- Google web-based products: Chrome, Docs, Drive, Calendar, Gmail, and Youtube
- Proficient in numerous real estate related web-based software: HAR Matrix, Back Agent, Zipforms Online, and numerous in-house Gary Greene products
- Proficient in social media platforms such as Facebook and Tiktok

# DANIELLE IVIE

1415 Eldridge Pkwy, Houston, Texas 77077  
[Danielle.Ivie44@yahoo.com](mailto:Danielle.Ivie44@yahoo.com)

## SUMMARY

Dedicated and focused individual who excels at prioritizing, completing multiple tasks simultaneously and following through to achieve project goals. Seeking a role to utilize my talents and grow within an organization.

## HIGHLIGHTS

Results-oriented	Strong problem solver	Dedicated team player
Self-directed	Advanced MS Office	Adobe InDesign
Professional and mature	Suite knowledge	Schedule management

## EXPERIENCE

### CHRISTUS FOUNDATION FOR HEALTHCARE

Houston, Texas

#### Events Manager

5/2018 to Current

As the Events Manager at CHRISUTS Foundation for HealthCare, I am responsible for planning, managing and executing all Foundation Events, including but not limited to:

- Spring Luncheon: The Spring Luncheon is a yearly luncheon event held at the River Oaks Country Club with approximately 450 guests. The event consists of a VIP reception with a meet and great photo opportunity with our guest speaker followed by a short program and presentation by the guest speaker.
- Nun Run: This is police escorted motorcycle ride from Houston to San Leon with approximately 300 guests. The event begins with a band performance, program and raffle basket sales and ends with an awards ceremony and lunch for all guests.
- Young Professionals Events: As a Foundation, our goal is to increase our involvement with the Young Professionals through Happy Hour and volunteer events. These have included networking happy hours and making blankets for the Senior Community.

My responsibilities range from engaging event chairs and host committee members, researching, securing and arranging all event talent, working with the Communications Manager on all event mailing, communication and signage and all event logistics. Event logistics include coordinating with event venue, creating and updating the event timeline, arranging and overseeing all event vendors, tracking and managing event registration, recruiting and coordinating event volunteers and event run of show and management.

In my first year at CHRISTUS Foundation for HealthCare, the Events net revenue increased by 11%. This was achieved by successful marketing to prospective donors and decreasing unnecessary costs.

#### Community Involvement

Through CHRISTUS Foundation for HealthCare, I given the opportunity to be one of the starting committee members of "Veteran Transition Success Coalition (VTSC). VTSC offers resources for veterans and military families. My involvement includes assisting with the overall event logistics as well as the coordination of community and retail booth for the event.

I serve on the Advisory Board for the Houston Philanthropy Circle, a group with the mission to "empower philanthropists with networking opportunities amongst their peers as well as to introduce nonprofits to this donor community".

**WARD & AMES SPECIAL EVENTS, INC**  
Houston, Texas

**Graphics and Registration Lead**

7/2015 to 5/2018

As the Graphics and Registration Lead, my role was to work directly with the client and/or event chairs from start to finish, from the invitation to the final attendee reports. I guided the client and/or event chairs with all printed materials, including invitation, underwriter letter and program, and was responsible for creating sponsor scroll PowerPoints, go-to slides, and event signage. The process consisted of writing request for proposals for graphic designers and printers, tracking the event RSVPs, whether it be electronic or mailed replies, and advising on table arrangements and seating diagrams. Day of responsibilities included supervising registration volunteers and all troubleshooting.

**Production/Event Manager**

11/2013 to 5/2018

As Production/Event Manager, I assisted with large corporate and non-profit event planning, logistics, and day of responsibilities. These responsibilities included securing talent, coordinating their arrangements and overseeing a team in managing talent day of, creating and submitting décor request for proposals and coordinating décor previews with the selected company followed by organizing the décor team for load in and load out on day of, creating front elevation stage designs, and writing request for proposals for backdrop options.

**Administrative Assistant**

11/2013 to 7/2015

As the Administrative Assistant at Ward & Ames Special Events, Inc., I worked directly with Danny Ward, President and CEO, which gave me the opportunity to experience and acquire, first hand, the event planning world. I managed daily office operations and the maintenance of equipment. On a day-to-day basis, I designed and maintained electronic file systems, supervised all incoming and outgoing correspondence, managed the day-to-day calendar for the company, and created and maintained spreadsheets using advanced Excel functions and calculations to develop reports and lists.

**Samples of Events and Involvement:**

- Early Matters Houston – Registration Lead & Event Manager – was responsible for the logistics of a general conference and 9 breakout sessions, created online invitation, tracked and organized RSVPs via online system, and supervised the day of registration team 3/24/2017
- SunocoLP – Registration Lead & Event Manager – created online invitation, tracked RSVPs via online system for dinner event with 700 guests, and golfing tournament across 5 golf courses 10/4-5/2016
- EVA Airlines – Registration Lead – tracked and organized RSVPs and oversaw security credentials for 526 guest at George Bush Intercontinental Airport 6/19/2015
- Texas Children’s Hospital Legends Gala – supervised talent arrangements and managed talent day of event 2/25/2015
- Emirates Airline Launch Event – tracked and organized RSVPs and oversaw security credential for each guest at George Bush Intercontinental Airport and supervised the day of registration team 12/03/2014
- Houston Thanksgiving Parade – managed VIP performers 11/28/2013

**EDUCATION**

PSYCHOLOGY – **Sam Houston State University**, Huntsville, Texas, USA

2009-2013