



**ZIONSVILLE TOWN COUNCIL
MEETING MINUTES
FOR
SEPTEMBER 22, 2025
AT 7:30 A.M. EST
ONSITE MEETING
1100 West Oak Street**

This meeting was conducted onsite. All members participated in person.
Council Members Present: Jason Plunkett, President; Brad Burk, Vice-President; Craig Melton, Evan Norris, and Sarah Esterline Sampson
Absent: Tim McElderry, Joe Stein

Also Present: Adam Steuerwald, Town Council Attorney; Mayor John Stehr; Deputy Mayor Justin Hage; Lance Lantz, DPW Director; Mike Dale, Director of Planning & Building; Tim Berry, Crowe; Amy Lacy, Municipal Relations Coordinator and other Town staff.

OPENING

- A. Call meeting to order**
- B. Pledge of Allegiance**

Plunkett Good morning. I will now call to order the Monday, September 22nd regular Town Council meeting. If you would please, stand and join me for the Pledge of Allegiance.

All Pledge of Allegiance.

APPROVAL OF CONSENT AGENDA ITEMS

- A. Approval of the August 18, 2025 Town Council Minutes**
- B. Approval of the September 22, 2025 Claims**

Plunkett All right, the first item on the agenda is the Approval of Consent Items. Do we have a motion?

Burk So moved.

Plunkett First by Councilor Burk.

Melton Second.

Plunkett Second from Councilor Melton. All those in favor signify by saying aye.

All Aye.

Plunkett Those opposed same sign.
[No response]

Motion passes 5 in favor, 0 opposed.

REQUEST TO SPEAK

Plunkett Up next is a Request to Speak on Agenda Items. Amy, I have four, five requests to speak. Is that correct?

Lacy That should be it. Oh –

Melton Plus one.

Lacy We have six.

Plunkett All right, thank you. All right so our request to speak process is you'll have three minutes. I'll set a timer up here and notify you when there's one minute left. We'll call everybody up in order that they were received. So and then at the end of that three minutes we'll move on to the next person. If you would when you come up here, please state your name and address for the record and we will go from there. So up first we have and if I botch your name I'm really sorry – Georgianna Kaser.

Kaser Well done.

Plunkett Ahh, thank you.

Kaser I am Georgianna Kaser. My husband Jeff and I live at 7502 East 500 South. We are landowners involved in the Courtyards at Heritage Trail. Jeff's parents purchased our property in 1968 and he has farmed the land for his entire adult life. Several years ago we were allowed the opportunity to purchase that land from his parents so that we could continue the farming legacy. Sadly, in the last 12-14 years, we have watched our farm go from a peaceful, rural spot along a gravel road to a 64-acre annexed parcel which has been gradually surrounded by subdivisions. These new subdivisions have presented us with some farming challenges but we've adapted to the best of our ability. While we never preferred to see farmland developed, we did not oppose the changes that allowed many of you to make Zionsville your home. Now after 40 years of farming, the time has come for us to decide the future of our family farmland. As landowners, we have the right to sell. After careful consideration, we believe that partnering with Epcon is the best option, not just for us but also for our neighbors. There's no question that our farmland will eventually be something other than a field and we realize that this will impact those nearby. We do not wish to impose but instead proceed with respect and care to minimize negative effects. In our view, Epcon's proposal offers a more desirable outcome than any of the other buyers who have

approached us. In comparison, we believe that Epcon's plan is responsible, considerate of neighbors and represents a well-designed future for the land. It is our understanding that the Mayor, the Plan Commission and the HOA of Hampshire and several surrounding landowners have given positive feedback on this proposal. We humbly ask that you will join in that sentiment and vote in support of us and this development. Thank you.

Plunkett Thank you. All right up, up next we have Duane, is it Jebbett? Two for two.

Jebbett Good morning all. Happy Fall. My name's Duane Jebbett and my wife, Kathy, and I live at 9146 Bryce Circle in the Courtyard of Russell Oaks. We moved here to be near our daughter, like many of you, and her family in Carmel and we chose Zionsville because it reflects the values that we are, think about most – growth, strong neighborhoods and the high quality of life. Over 52 years of marriage we've lived in 24 different homes and spent considerable time in the custom home building business. Of all those experiences, the Courtyards at Russell Oaks has been the most comfortable and enjoyable place we've ever lived. The thoughtful floor plans, private courtyards and low-maintenance lifestyle provide the perfect blend of comfort and quality. Beyond the homes themselves, the clubhouse, the trails and the landscaping foster community connections while offering the privacy and peace we all value.

One of the features that drew us to Epcon was the age-restricted design. These neighborhoods create a safe, quiet environment with less traffic while adding vibrancy in the town. Residents like us place limited demands on schools and town services but we fully contribute to the tax base and actively support local merchants with our discretionary spending. Without communities like this, many retirees like us would look outside of Zionsville for the lifestyle they want which means the town loses not only tax dollars but engaged residents. Epcon neighborhoods attract high-value retirees, empty nesters and professionals who want to downsize without sacrificing quality. The diversity strengthens Zionsville's housing mix, balances the community across generations and keeps our community strong.

Approving this community is more than just meeting a housing demand. It's an investment in Zionsville's future. It ensures that people at every stage of life have a safe place to live while reinforcing the vitality, balance and quality of life that we all want to live in such a special place.

Burk One minute left.

Plunkett That was your –

Jebbett Thank you for your time and thoughtful consideration of this proposal. Thank you.

Plunkett Thank you.

Burk Thank you.

Plunkett All right, up next is Tommy Richardson.

Richardson Good morning.

All Good morning.

Richardson I'm Tommy Richardson, 6687 Beekman Plaza, Zionsville, Indiana. Twenty-nine years ago my wife and I retired, I retired, my wife was with me in Lafayette, Indiana with State Farm Insurance Company. We had lots of opportunities to go lots of different places in retirement. A lot of our friends were headed to Florida. I had been in Florida at one time as a coach and I knew that was not the place for me to stay so I looked at the communities involved and as I looked at the communities involved, I saw some things in the Zionsville area that really appealed to both Cathy and I. We were looking for an affordable. We were looking for an available. We were looking for a place where we could come and our children could come close to us, not going to Florida where it might be a little distance from being able to reach us so we settled on Zionsville, Indiana for a number of reasons. We found number one, welcoming people. We found number two, a place that I, we could continue our careers. I continued in coaching in, in both business and personal. I was anxious to get into the school system. I've been a football coach for 38 years, I'm still coaching at Zionsville High School. My wife was in real estate, she continued her business. They gave us a community where we could be active and involved and be in a vibrant community because we were not ready to sit on the couch, we were ready to go to work and it drew that kind of people to us and drew our and, of course, our children settled very, very close to us after that.

We've continued to find Zionsville the place. We now are living in Stonegate but we are also building a house with Epcon and we are looking forward to making this move in December. We've found the community great, the people great. We're looking for an opportunity to continue for another 30 or 40 years in this community and we would hate to see someone denied that opportunity in the future and we hope you make great decisions today concerning that. Thank you. Thank you very much.

Plunkett Thank you. All right, up next Jeff Heck.

Heck Morning. Thanks for the opportunity to speak to you today. My name is Jeff Heck. My wife, Debbie, and I live at 4282 South 800 East and we will be bordered by the Epcon community on our west and north property lines. I never thought I would be speaking in favor of a development. When we moved there 6-1/2 years ago, we knew it was coming, we just didn't know when. Well now it's here and I would ask that, that you approve. I think it's the, the right development at the right time and I would ask that you approve. Thank you.

Plunkett Thank you. We have Mike Andreoli up here next. Mike, are you going to present with the project –

Andreoli ____ 13:18 inaudible off microphone

Plunkett You got it.

- Andreoli ____ 13:27 inaudible off microphone
- Plunkett You got it. For the record, Mr. Andreoli is going to present when Epcon presents during the presentation. Up next would be John, is it Siva or Sina? Sima?
- Sima Sima.
- Plunkett Sima. There we go. All right.
- Sampson I thought John Cena was coming.
- Sima Welcome everyone. Welcome this morning. My name is John Sima. I live at 7740 East 400 South in Zionsville, Indiana. I have been there for 26 years. I have been part of the community in multiple facets of the, of the community from sports to community, I would say advocates for individuals with disabilities. I'm a co-founder of ILADD who are now somewhat in our building industry where we're building homes for those of disability. So I, like the Kasers, have lived there for 26 years. I did some farming as well and as the land is taken out of the community we, we do look for builders of such that will actually enhance our community and keep our property values high. I have a parcel of 30 acres which I just divided into three parcels myself where we're building now some homes there and I am for the project. I like the fact that what they have shared with us and, and the, the landscape and things that will be going in front of our house and I believe that it will keep our values and our values will continue to increase. I do thank you for your time to listen to me and I hope you approve the project.
- Sampson Thank you.

MAYOR/ADMINISTRATION UPDATE

- Plunkett Thank you. All right, moving on to the next item on our agenda is the Mayor/Administration Update and we have Mayor Stehr with us this morning.
- Stehr Good morning Councilors. I wanted to begin this morning with a look at the Comprehensive Plan. The Comprehensive Plan process is still moving forward. An initial draft has been generated and it has gone through the process with the three subcommittees. The next step is for the full steering committee to take a look at it and scrutinize it. That is scheduled for September 30th. Now after pulling together all the feedback from that, our consultants will have a public draft ready in early October that will be presented to the Plan Commission for the first time on October 20th. And then there will be a public presentation of the plan on October 22nd or 23rd and then a final draft will be ready in early November. The Plan Commission is on track to hear it and make a recommendation at its November 17th meeting and then it will come to the Council for final approval after that. So there are still plenty of opportunities for the different commissions and also the public to weigh in on the Comprehensive Plan.
- Also this morning, the Designated Outdoor Refreshment Area which allows adults to purchase and consume alcoholic beverages has been in place since April and by all accounts has been going well so much so as a matter of fact that we have a request from the Zionsville Main Street group to expand the borders a bit

to include businesses on the north side of Poplar between Main and Maple and the east side of Elm at the end of Oak Street. We will work on the mapping of that and the ordinance amendment and hope to present that to the Council likely in November since there's only one meeting next month.

Lincoln Park – Work on the Lincoln Park refresh is continuing. Community volunteers came out earlier this month to help out to help get the project started. The initial round of bids, you may have heard, came in a little higher than expected so we are rebidding the project under the Build Operate Transfer model which allows us to set a not-to-exceed maximum price. We're also value engineering the project to make it more affordable for us and those bids are going to be due by the end of this week. The Parks Department sold souvenir pieces of the former gazebo and offered engraved bricks and that whole process raised just over \$33,000 and that money will be used directly in the renovation of the park. And that's all I have this morning. Thank you.

NEW BUSINESS

Consideration of a Resolution Regarding the Appropriation of Additional Funds (Public Hearing) (Police Department) Resolution 2025-11

Plunkett Thank you. We have no Old Business items on the agenda so we will, we will move on to the first item of New Business which is a Consideration of a Resolution Regarding the Appropriation of Additional Funds. This is for the Police Department, Resolution 2025-11. We have Cindy Poore here if there are any questions from Councilors. I will point out this is a public hearing. I have proof of publication of the public hearing. At this point I'll open the public hearing if there's any members of the public who would like to speak. Seeing none, I'll close the public hearing. Any questions or comments from Councilors? Otherwise I would entertain a motion.

Melton Motion to approve Resolution 2025-11.

Plunkett I have a first from Councilor Melton.

Norris Second.

Plunkett A second from Councilor Norris. All those in favor signify by saying aye.

All Aye.

Plunkett Those opposed same sign.
[No response]

Motion passes 5 in favor, 0 opposed.

**Consideration of a Resolution Regarding the Appropriation of Additional Funds
(Public Hearing) (Road Impact Fees Refund-Harris FLP) Resolution 2025-12**

- Plunkett Up next is a Consideration of a Resolution Regarding the Appropriation of Additional Funds. This is for road impact fees refunds for Harris FLP, Resolution 2025-12. We also have Cindy here to present on that as well. We all get summaries for these requests and it's my understanding that this is just simply an overpayment of road impact fees that should not have been made and is now being refunded back to the property owner so. Cindy is certainly here if there are any questions. Again, this is a public hearing as well. I have proof of publication of public hearing. At this point I'll open the public hearing if there's any members of the public who would like to speak. Seeing none, I'll close the public hearing. Any questions or comments from Councilors?
- Melton I just have a quick question. I don't know if this is a Mike Dale question but how does this happen? How do we get to a point where somebody overpays by this amount?
- Dale It's my understanding there was a change in the fee schedule and then staff wasn't aware of that for this particular project and so it was just a communication gap among staff and so –
- Melton I didn't really see that in the memo so I appreciate that.
- Dale Okay.
- Melton Thank you.
- Dale Thank you.
- Plunkett Any other questions from Councilors? I'll make a motion to approve Resolution 2025-12.
- Melton Second.
- Plunkett And a second from Councilor Melton. All those in favor signify by saying aye.
- All Aye.
- Plunkett Those opposed same sign.
[No response]
- Motion passes 5 in favor, 0 opposed.

**Consideration of a Resolution Approving an Update to the Town of Zionsville
Americans with Disabilities Act Transition Plan Resolution 2025-13**

Plunkett Up next on the agenda is a Consideration of a Resolution Approving an Update to the Town of Zionsville with, Americans With Disabilities Act Transition Plan. This is Resolution 2025-13 and we have Lance here to present if there are questions or there will be a brief presentation from Lance.

Lantz We really don't have anything prepared but what you have before you is an update to our ADA Transition Plan which the town has had in place since 2015. Since that time, we've tracked several changes and updates and all the work that we've done, however, just recently INDOT informed us that we must now absolutely submit at least every three years formally an updated ADA Plan so Brad Meriwether, our new Deputy Director of DPW, jumped right into this about day three of his tenure here with the town and has just done a fantastic job pulling together the old plan and incorporating all of the changes we've been tracking and logging so with that I'd be happy to answer any questions you may have.

Plunkett Any questions from Councilors?

Melton Yes, I just real quick – ADA Coordinator requirement – is that going to be Brad is going to be the point of contact?

Lantz Correct. Brad has graciously agreed to serve in that capacity which has been passed around staff numerous times through the years.

Melton Fantastic and then the grievance procedure – I noticed that that was something that was a requirement. That's part of like – what's that look like I guess? What's the public have to do if they want to send out a grievance with regard to our ADA?

Lantz Sure. Most of them are, are informal. We'll receive an email notifying us of a condition or a situation. However, we must post on the website something that's prominently displayed where people can submit a form, submit their request, submit for information, etc. and then we log those when they're formally made. So we're going to kind of reinstate some things that used to be on the website that we've discovered had fallen by the wayside in recent years so as soon as this is adopted we'll be integrating this information onto our website.

Melton And will this allow us to receive more funds federally? Is that essentially where we're going?

Lantz Well, yes. INDOT has tied this submission requirement to eligibility for federal funds and we typically don't get federal funds. We haven't had a significant project that was competitive in the region to get federal funds, however, they have tied it to Community Crossings which we get each and every year and we

get a substantial amount so it is very important, I think, that we get this in in a timely manner to maintain our eligibility for that program.

Melton Yes, I think the county does Community Crossings too, right? Is that right and –

Lantz Pretty much everybody does and –

Melton Yes.

Lantz If you're not getting Crossings you're not doing it right.

Melton Yes, so my understanding is they tie it to the road projects occasionally to where you have to upgrade the ADA access in crosspoints?

Lantz Correct. That's a federal highway requirement. Anytime we do anything more significant than just crack sealing, I mean anytime we resurface a road we absolutely have to bring the adjacent ADA curb ramps up to standards if they are not already.

Melton Well thank you. I appreciate that. That's all.

Sampson Yes, the Disability Committee was definitely looking into projects that have already been done, projects that are projected and I do think there's some interest in coordinating with that information. I don't know if you had been in contact with anyone from –

Lantz Yes, Mr. Easterday, who is the Chair of that committee –

Sampson Right –

Lantz Had been doing some fact finding over the last several months –

Sampson Yes.

Lantz With our town engineer who is currently officially the ADA Coordinator and when this effort materialized, I reached out to Tom and I said hey, just didn't want you to think that anybody advanced anything without your participation or awareness so he's aware of this and we look forward to helping that committee or working with that committee however we can.

Sampson Okay, great. Thank you.

Plunkett Any other questions from Councilors? Otherwise I would entertain a motion. I will make a motion to approve Resolution 2025-13.

Norris Second.

Sampson Second.

Plunkett Second from Councilor Norris. All those in favor signify by saying aye.

All Aye.

Plunkett Those opposed same sign.
[No response]

Motion passes 5 in favor, 0 opposed.

**Consideration of an Ordinance Amending the Town of Zionsville Zoning Ordinance
(Petition 2025-52-Z) (Lions Club Park) Ordinance 2025-22**

Plunkett Up next on the agenda is the Consideration of an Ordinance Amending the Town of Zionsville Zoning Ordinance. This is Petition 2025-52-Z. This is from Lions Club Park. We have Mike Dale, Director of Planning and Building Department to walk us through this. Good morning Mike.

Dale Good morning. Lions Club is here this morning to rezone or request to rezoning for two parcels totaling 7.5 acres from the Urban R-V district and the Urban VBD, so there's two zoning districts involved, to the town's Urban Special Use (SU-7) zoning district. The project would change the zoning of the two adjacent parcels to match the zoning of the, of the existing park. The proposal is consistent with the recommendation of the Comp Plan that designates this area for park use. The two parcels are located north of Sycamore Street, east of Elm adjacent to the Lions Park.

On August 18th the Plan Commission held a hearing and at which time after taking public input, forwarded a unanimous favorable recommendation to you, the Town Council. The Plan Commission did not hear any opposition or remonstrance to the project except for one person who expressed concerns about the noise associated with the existing pickleball courts. Any more questions for me?

Plunkett Any questions for Mr. Dale?

Dale Thank you.

Plunkett If there are no questions, I would entertain a motion.

Sampson Did we – I do have a question. Did we correct this on the ordinance? Why was it highlighted for February 3rd?

Dale That's just a typo.

Sampson Okay, okay. And then, obviously, this, passing this would then have to be reflected in the new Comprehensive Plan so that update would need to go to HWC or?

Dale Well we can certainly inform HWC. This doesn't necessarily need to be reflected in the Comprehensive Plan but may. Thank you.

- Plunkett Any other questions from Councilors? Adam, if there's a motion for approval on this does that need to be considered with the modification of the correct date likely on the ordinance?
- Steuerwald You've got to have it corrected.
- Plunkett Okay, all right. At this point I would entertain a motion.
- Sampson I move to approve Ordinance 2025-22 with the approved correction.
- Melton Second.
- Plunkett I've got a first from Councilor Sampson, a second from Councilor Melton. All those in favor signify by saying aye.
- All Aye.
- Plunkett Those opposed same sign.
[No response]
- Motion passes 5 in favor, 0 opposed.

Consideration of an Ordinance Amending the Zoning Ordinance (Petition 2025-40-Z) (The Courtyards at Heritage Square) Ordinance 2025-21

- Plunkett All right, up next on the agenda is a Consideration of an Ordinance Amending the Zoning Ordinance, Petition 2025-40-Z, The Courtyards of Heritage Square. This is Ordinance 2025-21. Mike Dale, Director of Planning and Building. We'll also have Dale Pfeifer, Land Acquisition for Epcon Communities and attorney, Mike Andreoli, available as well.
- Dale Good morning again. Epcon Communities is here this morning to request a rezoning of several parcels totaling 180 acres in Worth Township. The project involves the development of 362 single-family, age-restricted lots and dedication of 26 acres to the town. The site is bounded by County Roads 400 South, 750 East, 500 South, also known as Whitestown Road, and County Road 800 East. The petition is to rezone the area from, from rural R1 which is the single-family zoning district to the Planned Unit Development zoning district. East of the site, east of County Road 800 East, is the Hampshire residential subdivision and north and adjacent to the site is a segment of the Big 4 Rail Trail. The Comprehensive Plan recommends this area for ag general that generally discourages uses other than farm-related residential development for this area and instead promotes sustained production of agricultural products. However, the plan also states that where development would be contemplated for this area that buffering between different land uses be incorporated to reflect the rural character of the area.
- The gross density of this project consisting of, again, 362 lots on 180 acres, is 2.0 dwelling units per acre. The net density if you were to exclude the 26-acre dedicated parcel would yield about 2.4 dwelling units per acre. In May the town's advisory technical committee reviewed the project for compliance with

local policies and regulations. Members of that TAC group included Department of Public Works, the Planning Department, Fire Department and Boone County Highway. The petitioner responded with the addition of a perimeter pathway along Whitestown Road and other revisions to the PUD text and exhibits.

The petitioner has submitted a traffic impact study which did not identify significant improvements to the street network and the study has been reviewed by the Department of Public Works. The proposed PUD Ordinance includes text and exhibits that identify the overall site layout, driveway locations, perimeter landscaping requirements, permitted uses, lot development standards, commitments and restrictions relating to the 26-acre dedicated parcel among other things.

On August 18th, the Plan Commission conducted a public hearing and during that meeting the Plan Commission heard testimony from two residents. The first resident spoke favorably but raised concerns about traffic impacts. The second resident spoke unfavorably in terms of added traffic, too many lots, the smaller lots and the visibility of the air conditioner units. Following public input and deliberation, the Plan Commission forwarded a unanimous favorable recommendation to the Town Council.

Plunkett Thank you Mike. Are there any questions for Mike before we hear from the petitioner? All right, thanks Mike.

Dale Thank you.

Pfeifer Well good morning Councilors. My name is Dale Pfeifer. I lead the land acquisition for Epcon Communities and we have offices at 11555 North Meridian Street in Carmel. And we're grateful to finally come before you as this project has been vetted for over, over two years, unanimously supported by your Plan Commission and faced only one remonstrator, just one. We understand the concerns about growth, that Epcon is different, low impact, private courtyards and delivering benefits far beyond typical subdivisions. Think of Heritage Trail as economic development in its most responsible form. Heritage Trail is an exclusive 55+ lifestyle community. Our homes are upscale with resort-style amenities. No other builder in Indy delivers this kind of product.

What sets us apart is our copyrighted courtyard design that puts the outdoor space in between the homes. Every lot has deed-restricted green backyards with no trampolines, now swing sets, no sheds. Our Courtyards of Russell Oaks has proven to meet Zionsville's high standards with average prices over \$800,000. Here's the key – Russell Oaks will be sold out before Heritage even begins closings. So this isn't actually added new growth, it's the continuation of proven low-impact success.

You may not think of this as economic development but it absolutely is. You see, our buyers are affluent, empty nesters. Half live within three miles, the rest are grandbaby chasers. I like to say they are givers, not takers. They fuel local shops, restaurants but add no strain on the schools. They're the holy grail of economic development, all benefit, no burden. We're not bringing people who take, we're keeping people who give and Zionsville's 55+ population is booming, 28%

growth rate. But here's the issue – Zionsville lacks the right kind of housing to retain them. These are your long-time residents, the very fabric of this community. If we don't give them options, they'll leave and take their wealth with them.

So we offer a unique solution. When seniors downsize into Epcon, their larger homes turnover to younger families moving into Zionsville without having to build a new subdivision. It's real. We have the data from other communities that support that fact. At Heritage Trail that's projected to be over 100 existing Zionsville homes, the equivalent of an entire new subdivision without having to approve one.

Let's talk economics, especially relevant today with all these budget hearings. Zionsville is projected to lose \$3.5 million dollars under the new tax caps. Meanwhile, Epcon is bringing \$200 million dollars in private investment for this community that will generate more than \$50 million dollars in direct benefit to Zionsville over 20 years and that includes \$2, \$2.4 million in new annual tax revenues, \$2.5 million in one-time fees and a \$4 million dollar land debt valued donation and we're not asking for a dime here. No TIF, no subsidies, no fee credits. We're also age restricting. That limits our market but ensures families with school kids won't choose to live here. Importantly, this preserves the town's TIF authority so if you ever need to fund a fire station or improve the land we're donating to you, you still can.

Yes, tax revenue builds over time but that's exactly why you need to start now with us. Waiting only guarantees higher impact projects later. Approve Heritage Trail now, you lock in \$50 million dollars in benefits at no cost to Zionsville.

Let's turn to the location – this is exactly the right location for responsible residential growth. It's not sprawl, it's, it's a long and major collector road right next to Hampshire approved 20 years ago at the same R2 zoning. It's the natural step in Zionsville's growth with zero impact on Zionsville schools since it's entirely within Lebanon school district. Right road, right neighbor, right time. According to the town's own Parks Department, this land has no important characteristics. It's almost all row crop farmland. That's why estate builders have not pursued it and why Save Rural Zionsville hasn't opposed it. This isn't preservation ground, it's the right location for smart growth.

Councilors, after many months of professional planning and public input, your draft Comp Plan designates the site in yellow as conventional subdivision. This wasn't casual. It reflects your consultants' analysis of traffic, land suitability, and other things that keep Zionsville unique and through every revision, that designation hasn't changed. Your staff, even the professional planner on Plan Commission, reviewed our age-restricted 2.0 density and found it appropriate here. So Epcon is delivering exactly what the plan calls for – medium density residential on a designated priority corridor. On a net basis, we're actually less than Russell Oaks at 3.0. Take a look at the map. The brown areas are estate residential. That's where projects like Bradley Ridge and Holliday Farms belong, not here. Concerned about Whitestown? Well, we're one property removed creating a clean, logical edge. Bottom line, this isn't sprawl. This is smart

growth, exactly where your plans calls for it, your staff and your plan, planners say it belongs.

One of my biggest pet peeves in zoning is when people just stop at one thing. What, what's the density? Density is just a number. It's really impact that matters and Epcon homes average just 1.7 residents per home. A conventional subdivision – 3.6. That's half the people, half the traffic, half the flushes and no kids in Zionsville schools. So while we show 2.0 units per acre on paper, we actually function like, like a 1.0 density neighborhood but with all the benefits. Said differently, same impact as today's current R1 zoning but with all the benefits.

I know density precedent is a concern but approving Heritage Trail at 2.0 doesn't open the door, it actually closes it. First, our community is age restricted. That's what I call a moat. No adjacent land can match our density unless they are also approved by you to age restrict. That's why staff and Plan Commission supported us. Second, Epcon is privately funding over three miles of mains, a new lift station and because our age-restricted homes generate lower flows and once our taps are allocated, any future project would be capped around 1.75 per acre, unless they also age restrict. So our 2.0 just can't be repeated. Third, there's very little land even left in this service area, only three parcels total, with just one 80-acre tract identified on a priority corridor. So I ask the question – are we really going to give up \$50 million dollars in benefits and a 26-acre donation to guard against only 80 acres? Bottom line, our site is the exception, not the rule. This isn't a gateway to more density, it's the moat that contains it.

So let's just continue on with Epcon. You get one builder, one cohesive master plan phased in eight to nine years. This PUD locks us, locks you into Epcon's model. Epcon is the safer, more predictable choice. Some say there's too much growth but really only in the last five years only four single-family PUDs have been approved that amounts to only 150 permits a year, that's really not runaway growth.

Let's turn to our low-impact plan. We've heard some comments that our homes –

Plunkett I'm sorry, could you back – what did you just say right there? In the last few years only how many?

Pfeifer Four, four PUDs with single-family components. PUDs, yes.

Plunkett Got it.

Pfeifer We've heard that our homes feel too close together but that's not a flaw, that's by design. Our layout actually draws from timeless T&D communities like Stonegate and West Clay. It's compact and connected by design. To grow smart, Zionsville needs housing diversity. Not every home should be just an estate home. This is world-class planning. On paper we may look dense but in reality, our compact design preserves more land. We're preserving over 50% of the open space, double of what's required, and that's what makes the 26-acre donation possible. Large lots may look nice but they sprawl. Our approach follows the smart growth and conservation design principles found in the Comp Plan.

Heritage Trail delivers three amenity centers, a Big 4 Trail connection and a once-in-a-generation gift to the town. This is a chance to create a welcome to Zionsville entrance with Whitestown and it's 100% yours to control. Without Epcon no land is donated. When the town asked for ballfields, we thought it was great so we changed course. We invested over nine months, delayed filings and spent tens of thousands of dollars redesigning our site all to answer that request.

Plunkett I'm sorry and I hate to interrupt – just for clarification –

Pfeifer Yep.

Plunkett The town asked for the ballfields in this?

Pfeifer The Mayor came to us.

Plunkett Okay.

Pfeifer Yes.

Plunkett Thank you.

Pfeifer So let's be real – the ballfields aren't exactly a natural fit next to our community but we did because the tradeoff was clear – density in exchange for that donation. But if the town doesn't really want the ballfields or public land, we'll fold it back into our community. With fewer homes, more open space, stronger buffers spread across the site where people can see it. So the bottom line, the choice is yours. Lock in the 26 acres for public use today or we can continue and return later with lower density in all residential plan. Heritage Trail also lists values compared to Hampshire. Our homes will sell for \$200,000 more on average, double the price per square foot.

Let's turn to traffic. Traffic remains a top concern so let me be clear – this project has been studied by licensed traffic engineers, not opinions, facts. Their analysis confirmed the impact is minimal. In fact, no improvements were even required. That's because Epcon generates 60% fewer trips than a traditional subdivision of the same size and yes, a traditional builder could absolutely put the same number of homes here with far greater impact. So think about it with Epcon. No school buses, no teen drivers cutting through Hampshire on e-bikes, residents traveling mostly off peak and many are gone for the winters. Traffic phases in gradually over 10 years, not overnight. So in almost all of our – this is important – almost all of our traffic flows to County Road 800, which is a designated priority corridor. A major collector designed to handle higher traffic volumes than it carries today. This isn't a country road, it's exactly where density belongs.

We have full neighbor support, that's pretty evident with, with all the speakers and, again, only one person has spoken out against us. We listened to our neighbors and completely redesigned the plan in their favor. Notice on the plan every perimeter green line you see will have a 4-foot-high landscape berm and layers of horse fencing and trees. Our community will be much more screened and landscaped from Hampshire, than Hampshire is today from County Road

800. That's why the Hampshire HOA reaffirmed their formal letter of support and why there's no organized opposition. We get there's always going to be some people that feel like they own their view but in our case the very people, the very people directly impacted by us, the neighbors next door, believe this is a better outcome. That should carry a lot of weight.

So after some rigid vetting, Plan Commission and staff has made a positive unanimous recommendation and found our proposal checks every box and it aligns with the medium density goals. So the real question is this land will develop – the real question is how? It's already zoned residential and the owners are ready to sell so what's the best possible outcome? With us everybody wins.

In closing, Heritage Trail is an economic development paired with the right housing in the right location for the right people at the right time. The draft Comp Plan supports it, the Mayor, staff, neighbors, and Plan Commission have all supported it. Say no, affluent seniors leave for Carmel and Westfield, other builders pile on with higher impact projects, Zionsville loses \$50 million dollars in benefits. Say yes, you side with neighbors and deliver smart, measured growth with no more burden than Russell Oaks. Bottom line – Heritage Trail functions like 1.0 density but with 2.0 the benefits. With Epcon you lock into the safe, smartest outcome growth without compromise. This is why it's uniquely Zionsville and I appreciate your consideration.

Plunkett Thank you.

Andreoli Mr. President, if you might, I'd like a, just a very short, brief couple of comments.

Plunkett Sure.

Andreoli As it relates to the dedication property, we, we took several steps during the PUD including substantial meetings with members of the Plan Commission themselves as well as staff as it relates to some of the language with regard to the dedication. When Mr. Pfeifer mentioned ballfields, that was not in conjunction with any discussions had with the Council, that was some initial thoughts as to what it might be, what it could be and how much land might be needed for that. We originally started with a dedication of a much smaller amount of land and as it, as the discussions morphed with the Administration, a larger parcel was discussed, ultimately centering on 26 acres. Ultimately, the decision with regard to the dedication, if approved by the Council, is up to the Council itself. The actual PUD provides for a dedication agreement to be prepared and executed between Epcon and the Council with approval from the Mayor as well so all of those things are, are well within the Council's good offices as it relates to the potential uses. All we would say about it is that we have provided in the PUD documents full I think flexibility for the Town Council to come to a decision as to what you would want the 26 acres to be. That would be your decision impacted not by us in, in any measure, simply a dedication of land. We would simply need to know when that dedication would be and the language of the PUD is wide enough to give you many options on what you think would be best for the 26 acres, not, not anything in our opinion. Thank you sir.

Plunkett Okay, you bet. All right, as Mr. Dale expressed in the introduction, this was forwarded to the Town Council from the Plan Commission so this will be a vote for approval or denial today. Are there any questions from Council for any of the petitioners?

Norris I need to talk about sewer capacity and, and the sewer district. Mr. Pfeifer, would you be able to educate me a little bit on where, where sewer is at with this particular area in terms of – my understanding is, the reason I ask is, I believe it falls within Whitestown jurisdiction so this may be a Mr. Lance Lantz.

Pfeifer I'm looking around for the utility experts but all right Lance. If you don't mind because I'll butcher it.

Norris Sorry George, Lance.

Lantz No, that's quite all right. I've asked George to step up here because he's been most closely involved in the technical review of this project as it has evolved through the approval process. So, the, the brief history is County Road 800 East and this project is just west of that, several, for many years was in the Whitestown sewer service area and there had been a, an effort many years ago to assign sewer areas going back to the days of the Boone County Utilities era which pretty much said if you're living in these areas, this is ultimately going to be your provider. I think it's also important to realize that even if you have a development in our sewer service territory, we have challenges serving those as well.

So when it comes to this particular location, a couple years ago Whitestown amended their Master Sewer Plan and withdrew their planned sewer service territory back to the west so it has created a little bit of a gap of, of no man's land. And the obligation to provide sewers to this, I think, is really questionable. Are we obligated by virtue of it being solely within Zionsville's corporate limits even though it's the rural service district? I don't know. However, I can empathize with the feeling of frustration with property owners which is like just who is going to service it and what I can say is that throughout this process they've been very good to work with, very accommodating and while, I'll say what I initially looked at as a hurdle or, or an obstacle or something that wasn't fully embraced because this is in an area that has never been included in our calculations for our entire service, sewer – I'm going to trip all over that – I'm sorry this morning – service area.

You may recall a presentation last year where we said when we grow up our plant's going to need to be a 2.5/mgd million gallon per day plant. We're, we're a 2 million gallon per day right now. Well that took the whole service territory, as we understood it to be and accepted it at that time. This area was not part of that. So my first reaction to this is, was to protect the utility and protect the capacity of the plant, protect the capacity of our collection system but in discussions with the developer, I now see this as, as potentially an opportunity because right around the corner we have areas that have always been considered to be within our sewer service area that face the same limitations in capacities in the system that this site does. So I'm going to stop there. I may have strayed from your question and you can get me back on track with any other questions that you have.

- Norris No. Do you have any concerns about serving this potential development in the future?
- Lantz I do not at this point. As I said, the discussions with the developer and their team have been very productive. They've been very accommodating. They've listened to Mr. Lewis as our town engineer, also an engineer who has practiced in designing systems and plants, and so far all the discussions are taking us in a positive direction.
- Plunkett Any other questions from Councilors?
- Norris Yes, Mr. Andreoli.
- Plunkett Go ahead.
- Andreoli Thanks to Mr. Lantz for answering that question. It's also important, I think, for the Council to know that we funded, I don't want to say we, it's Epcon, funded a, a substantial sewer investigation study with regard to the ability to be able to go ahead and provide sanitary sewer functions in terms of cost, accessibility, timing, those types of things and submitted that as part of our application. That was done at the, at the get-go to know whether or not this area could be served, how it would be served and whether it would be appropriate for the town and hopefully that played a role in, in the answers that Mr. Lantz gave, gave you today.
- One of the other thoughts that I have, I see that Commissioner McElderry is not attendance today. Given the fact that this is his area, would it be, would it be smart or intelligent and we would certainly have no objection to make sure that he was here to express his views publicly with regard to something in his area. We've had discussions and we're not aware that Mr. McElderry was unavailable.
- Norris Yes, we –
- Andreoli Pardon?
- Norris We weren't either. We found out this morning. We were already sitting up here.
- Plunkett So, I would say respectfully Mike, I have no problems with the intelligence level of this Council. Councilor McElderry texted me last night at 7:00 saying he wasn't going to be available this morning. He has to be in San Francisco. So he's on a flight right now as we speak.
- Andreoli Well it might be interesting for the public to hear what his thoughts are given the fact that this is his –
- Plunkett Sure.
- Andreoli District. I understand. He may have talked to you Mr. President but we might, the public might be interested –
- Plunkett I'm just saying he texted me last night.

Andreoli Very good. Thank you.

Plunkett I will go on record as just simply saying I have no problem with the product that Epcon puts together. They've done a phenomenal job in the Russell Oaks development. I was part of the approval process for that. As I've shared from the very beginning, I have no problem with the Epcon development. They do a really good product. I think the folks that are living there are happy with that. I think the neighbors are happy with the process of that development to the best that they can be. I would just say from my perspective and this, this abuts my district and while I appreciate Mr. Pfeifer's comments about 800, when you get south of 550 on 800, that road is very, very narrow and that's going to require a significant amount of work, I think, as we go through this regardless of what goes up there. I think when it was originally brought to Council leadership in early 2025, we mentioned concerns with the project and at that point expressed concerns both with the parks area as we're going to hear next on our agenda, our budget process. It is a little bit difficult from time to time and the parks is, is quite a bit of a, quite a bit of a lift when we start talking about properties being donated to the town.

When Epcon came to us for the Russell Oaks development, some of you guys on the Council might remember, there was a comparison of if we don't do this then we will do that and there were similar, similar amounts of homes and, and the proposals that were out there, this is a little bit different for me. I mean, again, it abuts my district. We go from a current zoning classification of less than one home per 2 acres which would, would limit this to about 90, 90 homes if they decided to develop it the way that it's currently zoned as opposed to now being up to the 2+ and, and the reason I asked for clarification on the comments about the PUD, I mean, from where I stand we have to be, I think we have to be cognizant of the fact that we've got seven different developments that are coming online over the next few years. Whether it's the Woodlands project, Bradley Ridge, Promontory, Adler Apartments, Russell Oaks, Wild Air, The Farm – that's over 1,750 properties. I had us at 2.65 but with what Mr. Pfeifer said at 3.6, that's 6,300 people and those people have not been felt yet and then obviously with another 362, even at 1.7 that's a significant amount of people that we've gotta make sure that we're preparing for so.

Melton Lance, I have a question. I'm sorry. I tried to catch you before and – I just need the expert please.

Lantz Okay.

Melton So we started to lean into a comment about surrounding or closer, other properties that are near this area with regards to our sewer capacity. So my question is should we approve this today, will the capacity level of this development be a reason to deny another property owner within our sewer district from being able to develop into a neighborhood or being able to use their given current sewer capacity I guess is my question. So I do know that there was comments within the presentation about half the flushes and all that and I think that's a valid point. However, I fear if we approve this and then we get ourselves in a pickle where we can't provide sewer service to an area that is within our district

based on our current capacities and maybe that's where we just have to expand the system but that costs money and I don't know where that money is going to come from when we're looking at our current budgets. So long the short is, will this force us to deny potentially somebody within our district in the future?

Lantz I'm going to turn that question around just a little bit but the answer to that is no.

Melton Okay.

Lantz Based on the technical discussions, that has been our overarching goal when this went in is with this development being slightly unique and it's always been outside of our calculation area, so we'd really like our system to be whole. Now and I'm going to use the word system to be our collection system. For now we're not even talking about the plant. I don't have concerns about the plant. We are in the beginning phases of a 4-to-5-year program to, to grow the plant so I am not at all concerned about plant capacity right now. Where we have our restrictions is how we get the effluent to the plant. So in this area they've been working with, with George and we've said basically when this is, if this is approved and the system is built, we want to be right where we are with our system capacity so no one else suffers. Now when I said turn that question around – any development out in this area is going to face these same challenges, even if you're in our sewer service territory as it is established meaning this system is limited everywhere.

Melton Access.

Lantz Pardon me?

Melton The system access is what you're talking about, not the capacity, it's the system access.

Lantz It's both.

Melton No matter, no matter where it is over there –

Lantz It's both.

Melton Whether it's in this development or the adjacent, access is what you're saying –

Lantz It is both access and capacity in the system, okay? Because remember to get all this effluent to the plant you've got to go through a series of gravity pipes and lift stations all right? And those lift stations become the pinch points so you've got your, when I talk about capacity in the system you got pipe diameter and how big the pumps need to be and so far they've listened to everything that Mr. Lewis has said and seem to be planning to basically make us whole as a result of their subdivision or their development.

Melton Thank you. I'm comfortable with that answer.

Lantz Okay, thank you.

Sampson I wanted to kinda tackle density. I came to your place. I did like your product. I think it's great. On the concept behind having a place for people who want to stay in Zionsville to move on from their family home to create a dynamic where new families can move in without adding subdivisions, I think that's obviously a very big bonus of your model. I do struggle with one concept and I'm not sure who can clarify this for me but it would be tax related. The sales pitch that 362 homes wouldn't bring the additional traffic, I know you said was done through a, through a, a traffic study but I am someone who is 55. I don't hide my age and I do still drive multiple times a day. I think in the PUD I may have read that it only had to be 80% 55 or am I making that up? No, I did read that, okay. So there could still be families in there who don't hit that age, correct? They, they could have, is that right in the PUD? You don't have to clarify it right away because I'm sure I'll ask seven questions within one question. But it got me to thinking when I read your presentation it also said that you have givers and active people who live in your type of neighborhood, but I think that goes against the sales point that you won't have them driving on the road. I love the idea of people who are chasing their grandchildren. I, myself, am a grandmother. That alone, if my granddaughter lived around the corner I'd be driving all the time to go see her.

It gets me to a concerned place which I brought up the taxes of the schools – so one of the points of positivity is that it won't impact our schools because there won't be the kids in the houses but we aren't the school district for this area so, therefore, that benefit doesn't benefit us but the burden of the active grandparents does affect our roads. So it kind of, for me, negates that benefit unless and this is the ultimate tax question I have – does the tax dollar, I was always under the impression the tax dollar followed the child to their school district. I see Tim Berry – maybe you could help me this. Would there be a tax benefit from the referendum to Zionsville that I could get behind? But if the tax dollar follows the child to Lebanon, my communication right now is I think we're getting the burden of this, of the people having a higher density than is currently zoned without the benefit of the school not being affected because our schools wouldn't have been affected. Am I thinking that correctly, Tim? Would you hit that one? Because ultimately that brings the density concern a little bit higher on my list of should we consider this.

Norris Tim on the spot.

Sampson I'm sorry Tim.

Berry Tim Berry with Crowe. I am the municipal advisor to the town. I do not represent the school corporation, either Lebanon in this case it's my understanding that it's Lebanon Schools or Zionsville Schools. I will comment more as, so I hate to overlook that question but I really am not prepared to answer that question –

Sampson That's fine.

Berry As it relates to the schools but I will say as we move to a system in Indiana based on Senate Bill 1 that drives growth in communities and growth in revenue to income tax, certainly higher density, higher income net worth individuals is what communities are going to be striving to as they continue to try and grow their tax base.

- Sampson So the, the statement that was said by Dale – you said either the ballfields or the density was what I heard in your approach of density and I just wondered if there was any way to lessen the number from 361 to keep a more palatable amount of homes in this area? I think your product is awesome. I think the theory behind your product is awesome but I do think it is a stretch for us to jump that much in density when that is the number one drum that is beat for us from our town of our roads are hard to drive, our farmland made it so we have a bunch of skinny roads and it doesn't seem like where you are should affect everybody but it really does and it, with us having budget cuts I don't see us making huge infrastructure improvements right now. So that's the push I have was is there a number that you could drop off the 362? Baseball fields – I know that's been a mayoral, I don't want to say push but angle, and I don't know how everyone up here feels. We haven't discussed this amongst us, we wait until the meetings but us saying not getting baseball fields and still having 362 homes doesn't make me feel better. So I don't know if that's how you all feel. This is obviously when we can discuss it. I'll, I'll stop there.
- Burk I have one question just as a clarifier – it might be Mike. So I've heard two different numbers – current zoning right now if this were not to pass, is it 180 homes could currently be built on this, on these three properties or is it 90?
- Dale 180 homes on –
- Burk Current zoning.
- Dale Yes, current zoning, one dwelling unit per acre, 180 homes.
- Sampson With the rural is it one dwelling per unit?
- Plunkett I think we're 1, 1 per 2. R1 residential is –
- Sampson With no sewer isn't it 1 per 2?
- Dale With no sewer? Yes.
- Sampson Because right now we have no sewer –
- Dale That'd be right, yes.
- Sampson And it's rural so it –
- Norris So –
- Sampson We could only build 90.
- Norris Time out. Is the official answer 90 or 180?
- Dale Currently?
- Norris Current zoning.

- Dale Okay, 90 on, on no sewer.
- Norris Okay, because I heard 180 –
- Dale Yes.
- Norris And we did our research –
- Dale Yep.
- Norris And we talked about 90. I guess Mr. Pfeifer if you want to come up and explain. I'm, I'm confused. I want to know what the, I want to know what it's going to be zoned now as it sits here today. I don't want any back and forth.
- Plunkett Yes, my understanding is looking at the zoning map right now it's zoned R1 and when you pull up the R, R zoning, it says rural single-family residential district is hereby established to be low density rural residential district. The lot area and minimum floor area requirements are intended to be larger than other rural resident districts and development in this district typically has a density of less than one home per 2 acres.
- Sampson Right. I think that's part of what we were having is going back to the anticipated change versus where we are right now and so we're going from 90 to 362 if we're talking about today zoning.
- Dale Not on sewer.
- Sampson Not on sewer.
- Dale Right.
- Burk Yes, I'm, I'm trying to get to if it were developed as it's zoned now and planned and decisions that were made before my time, 90 homes could go up or if we consider changing this, there will be 362 homes and I get that there's a sewer difference. That sewer expansion and the other homes would be on septic. That sewer expansion could also lead to neighboring, potential neighborhoods down the road that'll tap into that same sewer line but once it's there then it's going right when you, you've expanded the sewer line.

Just a couple comments and I echo a lot. This is a, this has not been an easy decision to weigh because there's a lot to like about this proposal as stated. I love that there's some age restriction for 55 and over, I think there's some real benefits there and maybe overstated on terms of traffic. There, there is a need for smaller homes in our community for people to downsize or that over group or grandparents or whatever it might be – people who don't need 4,000 square feet anymore. The quality of the product is, is to be admired. There's some nice AV in there for the town as well at that price point. Like Jason and probably Craig as well, I voted for the Russell Lakes project a few years ago, in fact, it's one of the first votes I think I took on Council. There's was a lot I liked about that. It was, even though it's high density at 3.0, it's right off Oak Street, there really wasn't a

traffic problem at all. I liked there was some estate homes in there around the lake. I thought it was the right community and the right project for where it was located and you'll see that we're continuing, now across the street there's a lot, there's a lot coming in with Wild Air.

But I have struggled with a few things. 1) You heard the Mayor say earlier that we're going to have a Comprehensive Plan in front of us in a month. If not, we're going to have something by the, in the next two weeks to look at and I know this is in there now but I've really struggled to say if it's a small change or an individual property or something but to, to change a PUD before the ink is dried on a Comprehensive Plan, I've just really cautioned any large development before we, before we really get a hand around what we want our vision for the future of Zionsville to look like. So I just have been leery about any large project before the PUD is, before the Comp Plan is passed. And I've sat up here and I think a lot of projects that have come forward, I mean there is and I know Dale said it's not all about density it's about impact but I am a density-focused person because that's what everyone in Zionsville tells me when I'm out and about in the community for the last six years through two campaigns. People want right-sized development. They know there's going to be development but they want it to look and feel consistent with what Zionsville is and there is a rural district, there's an urban district and I think every project that you mentioned Jason that are coming online with 1,700 homes, I voted for all of them.

Plunkett Yes.

Burk So, I've not voted against really anything except for the last project that came before us that had a similar challenge. I get that there's going to be something developed there. Right now it's 90 homes apparently. I guess if sewer came to it it could be 180. We're asking for 362 homes on a 154 net acres once the donation is given away and I get Dale's conundrum of well if we didn't give you the ballfields we could actually get the density down on paper, if that makes sense. And I love the baseball diamond idea but let's also not confuse the idea that's also going to drive a lot of traffic. Twenty-four fields, 25 families per game per hour. That's a lot of traffic coming out, in and out of that area.

So my question has been I love the project. If it were in different places I would, I would vote for it immediately. It's is this the right location for this Epcon community and I'd love to see something like this in Zionsville. Hampshire is 250 homes with a net density next door of 2.0 per acre. I think Hampshire's actually a little large for what I would like to see there. I like what Pemberton has done a little better but it is what it is. The density here when you take away the 26 acres is actually 2.4 and I know Dale has said 2, I'd love it to be 2. If it were 2 I think I would vote for it. The question is it's actually 2.4 minus those donated acres which I just alluded to which I think is just a little bit higher than I'd like to see and I have asked a number of people about specifically the, the Epcon folks even last week, is there or was there any chance to get this density down a little bit to closer to 2.0? Could we trim 40, 50 homes off this project and still make it work and I think the answer is no. I mean they've, they've done the math and I appreciate the dollars and cents of this and what they have to have to make it, make it worthwhile for the, for the, for the company to make money but that's just where I am. I, I really struggle with it. That's not really a question, it's more

of a comment unless and I think a lot of Council members that maybe feel the same way, is there an opportunity to kinda come back with a pencil and trim the density here to make something really happen or not?

Andreoli Well let me just talk a little bit about the density and, and your specific question. I think we'd be remiss on behalf of the neighborhood and everybody else that's supported this to suggest that, that there, there might not be some opportunity to continue the discussion. We've had so much support from the surrounding neighbors and, and, in particular, from Hampshire which is 2 acres per, per acre. I don't know if I agree legally with the interpretation that Mr. Dale has since the ordinance provides for 1 acre, one house per acre gross density but notwithstanding that, whether it's 180 or whether it's 98, I trust that those discrepancies give you concerns as well, whether it's 98 or whether it's 180. I guess the, the problem is is that we, we've, this development has gone through a number of different iterations. It's been looked at given the complexities of it over a couple of years and so we've, we've been in discussions with the Administration with regard to all right, what kind of dedication? It started with a lot less acreage so if you're asking us to take a haircut in density, are you also willing to reduce the, the amount of land that's going to be dedicated to the town? Because essentially we buy that land and we're giving it to the town. So that, that, that seems to be I think a reasonable question that we have is and is that sufficient for the Mayor as well because we've had discussions with his Administration recognizing all of this has to be done hopefully in, in an amicable way and, and a way that satisfies everybody, not just the Mayor's office but the Council certainly has a huge role to play in all of this. So I guess the, the answer would be yes. I don't know that we're prepared – do, do you have a number in mind? I mean if you're asking me here if we, if, if density might be reduced, what number are you talking about?

Burk Well I had mentioned 40 or so homes to kinda get you closer to a number. I don't know where that –

Andreoli If you don't have a specific number we'd, we'd be, we'd be happy to try to continue the dialogue to see if we can find, find an amicable place.

Norris And, and if I could just add Mr. Andreoli, real quick if I – is that okay Brad?

Burk Yes, please.

Norris I just have – I need to know what, what we're going, what it is currently zoned versus what it's going to be or what it could be right? So this, I know that we, you say that there's a matter of different interpretation as to how you look at this Zoning Ordinance but I'm hearing 90 on one end and 180 right? So that's a, that's an issue of 4x or 2x.

Sampson It's sewer versus not sewer and there's no sewer currently so then it is 90.

Norris Right.

Sampson If you go by exactly what is happening today, the zoning is 90 because it's 2 acres per one house with no sewer in the rural area. So that's what this is.

Norris Right, right.

Sampson There's no grey area.

Andreoli Then if you look at the chart it's one, it's one house per acre. It, it's, it's – this came from the, unfortunately, this was adopted from the county's chart when this ground was taken in through the reorganization and we did our ordinances so I can tell you out in the county it's been interpreted as one house per acre. Zionsville may interpret it and, and developments occurred on that basis – one house per acre gross density and you can go down to 5,000 square feet lots. We're proposing 6,000 square feet for these lots but under the county ordinance, so you inherited this, you inherited the interpretation of it, you inherited the complexities of it and I think the irregularities of it. Notwithstanding all of that you'll have to make that call. I've always interpreted it as one house per acre because that's what the ordinance says but that's, that's the lawyering of it and as a practical matter, you, you'll have to listen to staff. That's, that's who's talking to you here today and it would be in, inappropriate for me to suggest that you disregard staff based upon my either legal analysis or interpretation of it.

Norris Well I think you hit the nail on the head for me when you said irregularities right? I want, I live in a world of black and white I want to, I want to –

Andreoli I know.

Norris Know what I vote on, when I'm voting on this, I want to know if we're doubling the, the current density or we're quadrupling the proposed density. So –

Andreoli I understand.

Norris It's, it's a big, it's a big issue for me.

Melton I think that's a great point – whether we're, whether we're doubling or whatever it is but we also have to consider what's coming to this location and we can't take a farm field and say oh, one house per 2 acres, that's what we're allowed to do and that's what we should cast to a developer that's going to improve the property.

Andreoli I think the key for us has always been in our discussions with the neighborhood regardless of the density or what, was what, what the product might be and the fact that we're not taking it from an ag zoning which has essentially no ability, they have a major residential subdivision or PUD with any form of density to, to one with density. So our, our discussions have always been at least it's not, it's not from an ag zoning. It, it is a residential zoning, it's the old zoning classification but it is what it is. I have a different interpretation but regardless, we're, we are where we are on it and Mr. Burk I think it would, I think it behooves us to continue to have some discussion about this. The other practical thing is that, obviously, Mr. McElderry given in his district needs to hear about if we're going to, he has any thoughts with regard to density change as well, recognizing it's a Council decision but that is his district so we have to be at least

particularly concerned about the fact that that's his district at least from our end.
So –

Burk Well I certainly appreciate that you're willing to maybe have a conversation about some density and I agree that maybe we need some legal clarity around if this 90 – I mean we're reading it one way, you're, you're suggesting that maybe there's a carryover from a county plan that maybe was different than zoning that would be in Zionsville which I would find hard pressed to –

Sampson But I think that's how Union Woodlands got in –

Burk So it may, yes –

Sampson Because it was under –

Burk I'd like some clarity –

Sampson County but it's not anymore is the point. It's not anymore so –

Burk So it was.

Sampson I think that would –

Burk Yes.

Sampson I think that would drop.

Burk But it would be, it would be good to, to know for sure so I mean I and I hear what you're saying and I appreciate that you're, you might be willing to have some conversation.

Sampson Joe is online listening and he just wanted to – Joe Stein – and he wanted to talk about the water pressure in Hampshire being subpar and he just wondered if that would be a concern or is there anything done to improve I guess the water pressure. I don't understand the couplings and the, the pipe underneath the ground but that was just something brought up that he would like considered as well if this were to move forward.

Andreoli Well, I know, I know when we did our sewer study there very well may be some type of water study. I don't think we did one because it wasn't part of our system, it was part of the, another, whatever system serves that particular area that had been in the area but we've had discussions with them and there seemed to be no issues with the capacity to bring water there. The real discussions we had –

Sampson (___ 1:24:55 inaudible) from Whitestown or from Zionsville if the water would continue because I know that's different water sources.

Andreoli It'd be the same water system across the street.

Sampson Okay.

- Andreoli Across 800. We'd be using the same, same water company –
- Sampson Okay.
- Andreoli That would extend that water. That didn't seem to be the problem. The real, real I think push point was the, the sewer and the, the ability to how to, plant capacity was okay but how do we, how do we get it there? What, what are the needs in terms of being able to do that? One other thing, I have a number for you that Mr. Pfeifer suggested to me. If, if you would agree to a reduction of 40 lots, we could keep the plan as presently as is meaning the dedication of land as is with no dedication of land in order to try to facilitate some type of approval here today. I wouldn't anticipate as long as we're not changing any of the other specifics, we'd need to send it back to the Plan Commission because we're not increasing units we're, we're actually reducing units but Council can so advise in terms of what that would be but if that is a number that you would be willing to do, Mr. Pfeifer said they, they, they would be willing to go ahead and, and reduce this from the 262 by another 40, 40 home sites.
- Sampson 362 to 322.
- Melton So I just want to comment – so if we do something like that, we lose out on 40 more taxable homes right? And we lose a property that's usable by the rest of the Town of Zionsville. So I have concern with that personally. I like your proposal. The only thing that I'm really struggling with is we have this road over here to the, to the west – East 425 South – and we maintain it as a three-way intersection until we decide as a town to develop the, the dedicated site. I think that should have been addressed in this, in this and I'm not an engineer so with regards to the street being not needed to be improved or any of that, I just, I see a T in the road and I just, it doesn't make sense that we're leaving a T in the road right next to a development when we're adding one, two, three, four intersections or enter ways to come into this neighborhood. So I just wanted to cast that out to the rest of the Council. If we are going to postpone this, I'd like to maybe have us look at that. One of the worst things I think we've had to do recently was the Big 4 Rail – I love the Big 4 Rail Trail. I hate that intersection in the corner. You cross the Big 4 – I'm sorry – you cross 400 at a diagonal. I think that was the worst, one of the worst things that we could do, however, now we're going to develop next to it and utilize the Big 4 Rail Trail and all the pathway connectivity around this development and then sounds like right now you're asking this developer to take away 40, 40 lots and then take away 26 acres of dedicated property to the town. I think that –
- Burk No, that's not – just to clarify – I believe that it's take away 40 homes and maintain still the 26 acres.
- Melton No, that's not it. That was the, that was the, that was not what just was –
- Sampson Yes, we need, we need clarity on that one.

- Andreoli We are proposing to reduce, voluntarily reduce our, our density another 40 lots. Nothing regarding the dedication of the ground itself will change. Still 26 acres dedicated to the town.
- Melton I'm sorry, I misheard. Thank you.
- Burk Yes, it's fine.
- Andreoli And I may not have made myself clear so I apologize with regard to that but I wanted to make sure that that was, that that was clear that we were not reducing with the plan we would not called. I asked rhetorically before I talked to Mr. Pfeifer with regard to numbers whether you'd be interested in reducing that for reduction because it's all a cost issue in the end.
- Melton Absolutely.
- Andreoli And so he indicated 40 lot reduction would not cause a reduction in any of the dedicated land, the 26 acres would still be reduced. One thing I want to make sure that is clarified – we will probably have to go back to the Planning Commission because if we're, if we're just reducing lots, we have to come up with a new concept plan and the new concept plan is part of, part of the actual PUD itself. I don't know whether that would bring us back to the Plan Commission or not or whether we can work through that with Council. We'll have, you can have a discussion with counsel with regarding to that but, obviously, where things are will have to change internally a little bit because if you're eliminating 40 lots you gotta, the, the basic change, the, the actual areas where you go into should not have to change and we do not have a cut on the county road into this development off of County Road 400. Specifically, staff requested, given the Big 4 Trail there, we not have a cut off of County Road 400 into this development and our concept plan currently does not have that. So make, making sure that we do not have a cut in there so that was something that was required by staff and that County Road 400 is totally uninterrupted by a cut into this development at County Road 400 so.
- Plunkett So I think one of my jobs as Town Council President, I think, is to make sure that we move forward with legislation and ordinances and resolutions in an appropriate manner and a timely manner. Obviously, we're required to hear this today because it's the first regularly scheduled meeting after the Plan Commission meeting where it was approved. I think Joe, Councilor Stein would bring up good questions about water pressure. I think there's concerns about density. I do think there's traffic concerns even with what Councilor Burk mentioned regarding the land and the, the ball diamonds and such and I would say that while I appreciate the, the donation of the land, we are currently sitting in a spot where we have received a "donated" parcel of land north of town that could cost us over \$35 million dollars over the next 15 years. So those are things that we have to all take into consideration.
- With that being said, I think not only because Tim's district is where this particular proposal lies, Joe is an at-large Councilor and I think it's relevant for him likely to weigh in on that as well. So I think with the understanding that we can get clarification on current zoning, Mike and maybe Jon Oberlander can help

with that from the town's perspective – what is the current zoning allowed – 90 or 180 as it sits today compared to where we're looking at going here. I would say I've heard just in the conversation up here that maybe the 40 wasn't enough for, for some folks so maybe the answer is to address these issues – the density, the current zoning, any potential water pressure concerns which may or may not be a concern with, with Lance, and maybe, maybe we should just continue this to the next meeting and give everybody a chance to work with, I know it's a short meeting, we've only got about a week before you can get everything prepared for the next meeting but we have 90 days from the Plan Commission meeting approval to take action, we just simply had to hear it today so. I don't know – what are your guys thoughts on that?

Norris I mean I don't think we can – I guess I, I can't under, so I think the value of understanding what the current underlying zoning calls for because I'm hearing two different interpretations up here. I think it's for the benefit of the public for people who may remonstrate for or against this, although I admittedly have gotten very few remonstrations against this and, and I agree with every, all the comments up here about this being a great product. I think Epcon is an excellent product – \$800,000, \$390 a square foot, I think we, we owe it to get, to get it right and to make an informed decision so I'm supportive of a continuance.

Sampson I'm supportive of a continuance. I did have two remonstrators –

Plunkett Yes –

Sampson I think that it's great that you're willing to get out your pencils and I think it would be good to have the other two Councilors here because of their representation being this area. I think you have a great product. I think we have a great feeling behind it but we're the ultimate approval and I think if there's still any kind of grey area, we should make sure we have that cleared up.

Norris And I do want to thank –

Sampson And, and it's only two weeks.

Norris I do want to thank Dale. Dale did meet with me for I think an hour and a half one day –

Sampson Yes.

Norris Going through this project so I do want to thank the, the petitioner for their willingness to sit down and discuss.

Sampson I agree with that. Thank you.

Plunkett All right, any other questions from Councilors? Otherwise I would make a motion to continue Ordinance 2025-21 to the next Council meeting.

Burk Second.

Plunkett I have a second from Vice President Burk. All those in favor signify by saying aye.

All Aye.

Plunkett Those opposed same sign.
[No response]

Motion passes 5 in favor, 0 opposed.

Thank you.

Sampson Thank you.

Consideration of the 2026 Budget (Public Hearing) (First Reading)
Ordinance 2025-20

Plunkett All right, moving on to our last item of New Business is a Consideration of the 2026 Budget. This is the first reading of our budget. This is Ordinance 2025-20 and we have Tim Berry, the town's financial consultant from Crowe.

Berry Good morning members of the Council. Tim Berry with Crowe. Just to start things off – we've been through the process this year of updating the 5-Year Plan utilizing estimates through that process of the impact of Senate Bill 1. We came to a first pass on that 5-Year Plan in July and that became the corpus of what we started the 2026 budget with. Since that point in time, the town, the Administration in individual meetings with department heads along with meetings with Council members and department heads over the last few weeks have reduced that budget and those expenditures so that we can present to you a balanced budget for the 2026 year. In that balanced budget, there still are some risks because we still don't know full impact of Senate Bill 1 but we do have better estimates from the Department of Local Government Finance as well. They have in the last few months come out with a determination that the town would be eligible to apply for an excess levy appeal based upon your growth in excess of the state's average on assessed value over the three years. If adopted or if approved, I should say, by the Department of Local Government Finance, that would amount to \$1.54 million dollars in new revenue. Those dollars are already in the budget estimates that you have before you. We have as well included supplemental LIT in distributions within the revenue forecast for 2026, although we have reduced that amount from what the town actually received this year in supplemental LIT so that we are presenting a conservative estimate on supplemental LIT but that dollar amount is \$1.85 million dollars in that local income tax line.

The full impact of Senate Bill 1 as determined by DLGF is just under \$800,000 for next year and that is an impact that the town will continue to feel every year moving forward. In fact, it is expected that that dollar amount impact in loss of property tax revenues due to supplemental homestead and tax cap issues will continue to grow over the coming years because the supplemental homestead deductions will continue to increase approximately 6% every year through 2031. As a result, revenues are relatively flat between the 2025 budget and what is

expected in the 2026 budget. The state has allowed a max levy growth quotient of 4%. That is included within that amount.

On the expense side, we have included or the town has included approximately \$725,000 in additional income adjustments to the base of salaries as they exist today, approximately \$411,000 for longevity pay for employees that would qualify for that and approximately \$314,000 in a salary adjustment to that. You will see though that as a result between the 2025 budget and the 2026 budget, expenses are decreased by a little over \$3.7 million dollars from 2025. This is largely in the capital outlies, capital outlays area and there is a little decrease in debt because of the retirement of one debt item and there is some reduction as well in other services and charges and your supply line is relatively flat from 2025 to 2026. The only increases that we're really seeing are increases in personal services associated with changes that were discussed earlier.

Bottom line – revenues over expenses as the budget exists today is balanced and positive to the tune of \$95,551 when we take out the debt service funds and really just look at the operational expenses. And with that I would take any questions that you may have for me or anyone else.

Plunkett Yes, thanks Tim. I just want to point out for the public, those in this room, you'll notice a significantly different budget process this year. This, this budget currently presented is high level, big picture and will be modified before our next meeting. Over the last few years we, we've held public meetings online with different department heads all in the room. This year each Councilor met with the Mayor, his team, assigned department heads and reviewed their individual budgets together. I appreciate, I want to say publicly I appreciate each Councilor for your full engagement on these efforts for this process as well, as well as the Mayor's willingness to provide access to, to staff and department heads. Again, this budget is the initial budget. We have two weeks to work with each department and the Mayor for individual changes that you guys have all identified and we will certainly accomplish the goals and objectives of the Council, staff and Administration through that process. Just make sure you're providing additional feedback to the Mayor following this meeting and, and we'll make sure we get those accomplished and, and with Tim as well so.

Burk Tim, I guess the only question I have is I mean I can see all the macro numbers and then you'd mentioned, obviously, the, the, the greatest expense to the budget other than, and I appreciate everybody really on the, on the Administration side of the house and all of our department heads and their teams, really getting lean and taking a good look at everything and trying to make sure that these, these cuts no one, no one appreciates these cuts. They're hard but simultaneously I think that the biggest commitment that I know that Council has asked to see and I believe everybody wants to see is that as best we can we're taking care of our staff. I appreciate that there's no loss of staff, that we're maintaining our current staff. There's longevity pay which I think is a wonderful advantage to keep our, our best seasoned staff and you had mentioned then that there was another \$300 and almost \$400,000 in salary increases. Can you explain is that a 1% across the board increase to staff? Is that what I'm seeing? I can't see the, I see the numbers but I don't know the rationale.

- Berry As of now it currently is allocated at \$1,500 per employee but that certainly is something that can be adjusted.
- Burk It's not a percentage, it's a flat –
- Berry Correct.
- Burk It's a flat and it's, and it's a salary increase?
- Berry It is not built as a base builder yet but that certainly is something up to the Council's determination.
- Burk Okay. Thank you for that.
- Berry The concern that everyone has across the State of Indiana is Senate Bill 1 is not just a one-time effect. It's going to have long-term impacts to local government funding and it's not just something that will impact the next two years. Your property tax revenues for the indefinite future will be impacted as a result of the impact of Senate Bill 1 and so many communities are looking at trying to reduce those budgets and the balance of those budgets that would be used carrying forward. Obviously, the town went to great steps this year to balance the budget. A large portion of that adjustment though came from capital expenditures and those are not things that can continue indefinitely without that investment in capital expenditures as well.
- Plunkett Anything else from Councilors? Again, this is an introduction, first reading introduction.
- Sampson I guess I just have one based on what you said – we're set, we're going for the setting of the rate but we're going to continue to be involved in the decision making of the final budget for next time we would have the breakdown of the, of the actual amounts? Yes, I'm comfortable with that.
- Plunkett Yes, unless, unless somebody had additional news for me, my understanding is we'll have the department budgets and be able to continue to work through those over the next week, week and a half so that we can – yes, I got the Mayor, Deputy Mayor, Jenna is even shaking her head yes so. That's good.
- Sampson Go Jenna.
- Berry Everything has been entered into Gateway. The budget has been advertised for Gateway with all of that detail.
- Sampson I just didn't know how fluid everything became after we set the rate without a second approval so.
- Berry And, again, there is \$1.54 million in revenue based upon the excess levy appeal which will require at the time of budget approval the Town Council to approve a resolution moving that item forward to DLGF –
- Plunkett Yes.

- Berry We just need to make that clear.
- Plunkett Anything else for Tim?
- Norris Nothing for Tim, just general comment that I look forward to – I was given the opportunity to, to meet with Fire and Police. I think those are probably, probably the, two of the highest priorities in terms of staffing. I want to thank the, the, the gentlemen from the local being here today to show their support for the budget process and for the letter that we received last night as well. So continue to look forward to, to making those adjustments and making those shifts to, to help out Fire and Police. Thank you.
- Plunkett Very good. If there is nothing else, I will make a motion to introduce Ordinance 2025-20.
- Sampson Second.
- Plunkett And I have a second from Councilor Sampson. All those in favor signify by saying aye.
- All Aye.
- Plunkett Those opposed same sign.
[No response]
- Motion passes 5 in favor, 0 opposed.

OTHER MATTERS

- Plunkett Up next are Other Matters. Are there any other matters from Councilors?
- Norris I would just like to congratulate Fire Chief of the Year, Mr. Jamie VanGorder, who was nominated and selected as the Fire Chief of the Year by the Indiana Fire and EMS Leadership Conference this past week.
- Sampson Yes, congratulations Jamie.
- Norris Congratulations.
- Plunkett Here, here.
- All right, anything else from Councilors?
- Sampson I also wanted to thank all the department heads. I know it's been a lot of work just having been behind the scenes with the unknown of SB-1 effects and I appreciate the extra time that you have all paid with the attention to detail. So thank you.
- Plunkett All right, last call – anything else? All right, I'll make a motion to adjourn.

Norris Whoa, whoa.

Plunkett Ope –

Steuerwald We should've had a public hearing on Exhibit F or Item F on the budget.

Plunkett Okay, I will withdraw my motion to adjourn.

Sampson We cannot adjourn.

Plunkett All right, so Ordinance 2025-20 did call for a public hearing. I have proof of publication of the public hearing. At this point I'll open the public hearing if there's any members of the public who would like to speak. Seeing none, I'll close the public hearing. Do we need to re-motion that Adam or are we?

Steuerwald We're good.

ADJOURN

Plunkett Okay, we're good. All right, then I'll make a motion to adjourn.

Burk Second.

Plunkett Second from Vice President Burk. All those in favor signify by saying aye.

All Aye.

Plunkett Those opposed same sign.
[No response]

Motion passes 5 in favor, 0 opposed.

The next regular Town Council meeting is scheduled for Monday, October 6, 2025 at 7 p.m. in the Zionsville Town Hall Council Chambers. Final notice will be posted in compliance with the Indiana Open Door Law. Thank you.

Respectfully Submitted,

Amelia Anne Lacy, Municipal Relations Coordinator
Town of Zionsville