## APPLICATION FOR URBAN DESIGN COMMISSION REVIEW AND APPROVAL

AGENDA 1	ITEM#	
Project # _		

DATE SUBMITTED: 1/29/2013  UDC MEETING DATE: 2/6/2013	Action Requested  X Informational Presentation Initial Approval and/or Recommendation Final Approval and/or Recommendation	
PROJECT ADDRESS: 9601 Elderberry Road, Ma	adison, WI. 53593	
OWNER/DEVELOPER (Partners and/or Principals) Proposed Owner: MCS Investments, Inc.	ARCHITECT/DESIGNER/OR AGENT: Architect: AG Architecture	
Developer: United Financial Group, Inc.	Site Engineer: Trio Engineering	
	Structural Engineer: Schuler & Associates, Inc.	
CONTACT PERSON: Judy Husar (ext. 105), Ryan Address: 660 W. Ridgeview Drive Appleton, WI. 54911 Phone: toll free: 1-877-968-8100 Fax: (920) 731-1696 E-mail address: JHusar@UFGroup.net, RM	n McMurtrie (ext. 137), Bob Zoelle (ext. 104)	
well as a fee) School, Public Building or Space (Fee may be re	Urban Design District * (A public hearing is required as equired) g of a Retail, Hotel or Motel Building Exceeding 40,000	
(See Section B for:)  New Construction or Exterior Remodeling in Ca	4 District (Fee required)	
(See Section C for:) R.P.S.M. Parking Variance (Fee required)		
(See Section D for:)  Comprehensive Design Review* (Fee required)  Street Graphics Variance* (Fee required)		
X Other CONCEPT REVIEW FOR PLANNED TR-UL LAND	O USE APPLICATION	
*Public Hearing Required (Submission Deadline 3 Wee		
Where fees are required (as noted above) they apply with	th the first submittal for either initial or final approval of	

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a project.

660 W. Ridgeview Drive Appleton, WI 54911-1254 Telephone (920) 968-8100 Facsimile (920) 731-1696

January 29, 2013

Mr. Al Martin
Urban Design Commission
c/o Department of Planning & Community & Economic Development
Planning Division
Madison Municipal Building, Suite LL-100
215 Martin Luther King, Jr. Blvd.
Madison, WI 53701

RE:

Highlands Community Concept Plan #22 for 9601 Elderberry Road

Tax Parcel #070821300971, located in the Elderberry Neighborhood Development

Dear Mr. Martin:

Thank you for your time today during our phone conversations and for providing the helpful clarification of the process overview for an Urban Design Commission review.

Enclosed is a proposed Application for Urban Design Commission Review for an Informational Presentation before the Commission along with the required 14 collated sets of 11" X 17" exhibits including a locator map and a narrative description of the Highlands Community Concept Plan #22 for property owned by Leo and Carol Ziegler. A CD-ROM containing PDF files of all the exhibits and materials included as part of this submittal is also enclosed.

Provided that you find this application submittal complete during our 11:30 a.m. meeting on Tuesday, January 29, we respectfully request that this item be placed on the February 6, 2013 Urban Design Commission meeting agenda.

Thank you for your consideration of this request.

Sincerely,

Judy Husar Vice President (920) 968-8105

JHusar@UFGroup.net

Ryan McMurtrie

Analyst-Development

Ayon Me Murtie

(920) 968-8137

RMcMurtrie@UFGroup.net

Enclosures: as stated





January 28, 2013

City of Madison Urban Design Commission Madison Municipal Building Suite LL 100 215 Martin Luther King Jr. Blvd. Madison, WI 53710

RE:

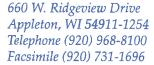
Highlands Community Concept Plan for 9601 Elderberry Road - tax parcel #070821300971, located in the Elderberry Neighborhood Development

### Dear Commissioners:

This narrative describes the Highlands Community Concept Plan #22 and its intended residential uses in support of an anticipated land use application filing for property within the Elderberry Neighborhood Development Plan on the west side of Madison. The proposed development would include an integrated variety of residential housing options with upscale finishes and amenities providing for walkability and continuity with the surrounding neighborhood. A future commercial-employment with possible residential buffer is contemplated for the southwest corner.

Introduction: United Financial Group, Inc. ("UFG") is under purchase contract with property owners Leo and Catherine Ziegler. UFG is planning to propose a comprehensive design to guide the development of a residential housing community located on 38.16 acres at 9601 Elderberry Road. UFG is a Wisconsin business founded in 1978, and its focus is in the design, construction and operation of residential housing communities with a primary emphasis being the specialized active senior retirement living market under the name Highlands Communities (HighlandsCommunities.com). Today, UFG operates a portfolio of over 3,400 living units in 16 locations throughout central, southeastern and north-central Wisconsin. UFG is a service provider exclusively to its affiliates providing professional property management; accounting, tax and financial planning; new development and construction management services; and mortgage administration. UFG strives to provide residents with an exceptional value and a living experience that exceeds expectations.

**Existing Site:** The Elderberry Neighborhood Development Plan, adopted in 2002, is bounded by Pioneer Road on the west, Mineral Point on the south, Pleasant View Road on the east, and Old Sauk Road on the north. The Ziegler site encompasses a total area of approximately 38.16 acres and is located south of Elderberry Road within Phase II of the neighborhood plan. The site neighbors the Woodstone Subdivision to the east, is bordered on the south by the Blackhawk Church Town Center Plat, and is southwest of the nearby Sauk Heights development. The current zoning classification and present use of the site is Agricultural and no structures currently exist on the site. The site is located in the Middleton-Cross Plains School District.





General Project Description: Since June of 2012, UFG has been in communications with city planning staff and has worked to refine the site and building designs in response to staff's feedback. The direction of the Urban Design Commission is being pursued in an effort to determine the best path to take to ensure that the end result is a high-quality development that is consistent with the goals, objectives, policies, and recommendations of the Comprehensive Plan and Elderberry Neighborhood Development Plan. The current Highlands Community Concept Plan #22 consists of 384 living units and five different housing components. The internal street pattern is grid-like with the main entrance provided by Bear Claw Way that connects at the southeast border of the site to Wilrich Street. Bear Claw Way will be extended south in the future to make the connection at Mineral Point Road. Public sidewalks align both sides of all streets to allow residents to easily walk throughout the community. The design features are consistent with the goals and objectives contained in the neighborhood plan.

Elderly Building: The north central portion of the site plan contains a 137-unit 3-story elderly building with a centrally located 5,000 square foot community center, including a four season room, hearthside room, multipurpose meeting areas, exercise/workout facility, library/computer room, three elevator locations, and heated underground parking with interior refuse area. The three elevators will access each floor, as well as the heated underground parking. The Jeffersonian architecture will consist of timeenduring brick masonry with accents, fluted columns, pre-cast window accents, and attractive building offsets. UFG has transitioned in the past 6 years to building contiguous communities which provide all elderly residents with direct access to the interior amenity areas, as they are preferred by the residents. Four driveways service the site. The northern driveways provide access to the main entrance for prospective residents, visitors, service providers, and emergency vehicles, while the east and west driveways provide residents access to the underground parking and allows refuse collection. The living units range in size from 700 square feet to 1,400 square feet and feature a full kitchen complete with energy efficient appliances, individual gas heat and central air conditioning, a patio/balcony, 9 foot ceilings with some having cathedrals, laundry hook-ups, pull chain help-call system in each bathroom, and individual private locked storage on each of the main floors. The building and site would be extensively landscaped with a variety of offset native ground planting materials and trees. Social activities offered would include cards, Wii bowling, bingo, potlucks, movies, and monthly themed parties. Health related and wellness activities such as foot clinics and blood pressure checks would be presented on a monthly basis at the community center. Common trips outside of a Highlands senior community include, as examples, Performing Arts Center events, and shopping trips. UFG's property management division would provide property management services. The staffing of the site would include a full time director, administrative assistant, housekeeping staff person, and maintenance person.

**Senior Townhomes:** Transitioning to the west are smaller massed senior townhomes with private entrances and direct-entry two-car garages that are oriented away from the street. This senior townhome component consists of 24 units contained within three 8-unit, two-story buildings. Two alternative 2 BDRM/2 BTH floor plans will be provided, ranging in size from 1,100 to 1,400 square feet. Based on UFG's experience, these units attract younger seniors who prefer the simplicity and freedom of a senior rental community, but desire the privacy and amenities of a single family home. The exterior architecture will consist of both brick masonry and composite siding.



Condominiums: The northeast portion of the site plan reflects 26 single story condominiums comprised of five 4-unit buildings and three 2-unit buildings. The exteriors would consist of two different colors of brick, stone accented fireplaces, and gables with composite siding. The floor plans are 2 BDRM/2 BTH and include a den, 2-car garage, fireplace, and a large patio. This housing type serves as a transition from the single family homes to the east.

Single-Family Attached Row house: The central portion of the site is planned for 53 three-story row houses contained in three 8-unit buildings, two 7-unit buildings, and three 5-unit buildings. The exteriors consist primarily of two different colors of brick, with composite siding and pre-cast accents. The urban street design allows the buildings to be oriented to the surrounding streets on all sides. The residences consist of two different 2 BDRM/3 BTH floor plans with 2-car garages on the first floor that are accessed by means of an alley. The second floor in both unit types serves as the primary living area and contains the dining room, living room, and kitchen, as well as an additional gathering area in the larger floor plan. The third floor in each unit type offers two bedrooms, two bathrooms and laundry areas. Stairs provide access to each floor.

Elevator, Underground Parking Rental Residences: Four thirty-six unit buildings containing market-rate rental residences with elevators, underground parking, surface garages, and surface parking are positioned in the southeast portion of the site to remain consistent with the 3-story, 30-unit apartment building planned to the east. The buildings are oriented to the surrounding streets, while the parking is centrally located. The exteriors will consist primarily of two different colors of brick, with stone and composite siding accents. These market rate residence will consist of 33% 1,400 sq. ft. two bedroom/two bathroom units with large private balcony/patio; 33% 850 sq. ft. one bedroom; 19% two bedroom/one bathroom; and 15% 1,150 sq. ft. two bedroom/two bathroom residences. A clubhouse containing the amenities and leasing office to serve the four thirty-six unit buildings as well as the row houses is oriented towards Public Street B.

Operating Plan: The Highlands Community operating concept, marketing plan, and management plan, as well as the design and proposed phased construction of buildings is modeled after UFG's 11 other successful Highlands Communities. Construction will be done by UFG's construction division as it has been for over 25 years. The construction management team will include an on-site, full-time superintendent employee of UFG to effectively manage day-to-day activities of subcontractors and to work with UFG's property management team on transition of the completed project over the course of phased construction. UFG is experienced with its costs, methods of construction and market demand for their building product.

### **Concluding Statements:**

UFG is a 30-year experienced Wisconsin and Milwaukee-Metro operator of senior living communities. The strong financial structure of UFG has allowed continued development and expansion even during the last three years when construction and real estate financing was not available for many Wisconsin development opportunities. This proposed Highlands Community, as is true with all UFG developments, will be wholly owned by the McMurtrie-Salmon principals of UFG and all construction and property management services will be provided by United Financial Group, Inc. Financial and community reference contacts have been provided in this submittal.





We look forward to continuing to work with City staff on this project. Should you have any questions, please call us at (920) 968-8100 ext. 105, 137, or 104.

Sincerely,

Judy Husar

Vice President

# PROPOSED "HIGHLANDS COMMUNITY"

by
UNITED FINANCIAL GROUP, INC.
660 W. Ridgeview Drive
Appleton, WI 54911

MADISON, WI







Blackhawk-

Church

# **AREA MAP**

PROPOSED "HIGHLANDS COMMUNITY"

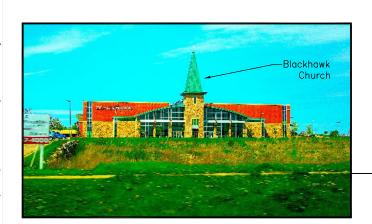
MADISON, WI





—Sauk Heights

> by UNITED FINANCIAL GROUP, INC. 660 W. Ridgeview Drive Appleton, WI 54911



ELDERBERRY ROAD



Active Senior Living



# APPLICATION FOR URBAN DESIGN COMMISSION REVIEW CONCEPT PLAN #22 - PROPOSED HIGHLANDS COMMUNITY DATED 1-29-13

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- Topographic Exhibit 1-28-13
- United Financial Group, Inc. Marketing Brochure with Development Experience and References

### www.highlands.communities.com

DEVELOPMENT SUMMARY
- PROPERTY AREA = 38.16 ACRES
(EXCLUDING NORTH/SOUTH R.O.W.)

- FUTURE COMMERCIAL - EMPLOYMENT WITH
POSSIBLE RESIDENTIAL BUFFER = 6.70 ACRES
- RESIDENTIAL AREA = 31.46 ACRES
- NET RESIDENTIAL AREA = ±24.68 ACRES

ELDERLY BUILDING WITH
 UNDERGROUND PARKING & ELEVATORS
 1 - 137 UNIT = 137 UNITS

2. SENIOR TOWNHOMES WITH TWO CAR GARAGES

3 - 8 UNIT/BLDG = 24 UNITS 3. CONDOMINIUMS (EAST & WEST):

3 - 2-UNIT & 5 - 4-UNIT = 26 UNITS
4. PRIVATE ENTRY, DIRECT ENTRY GARAGE, ROWHOUSE:

3 - 8-UNIT, 2 - 7-UNIT & 3 - 5-UNIT = 53 UNITS
5. ELEVATOR, UNDERGROUND
PARKING, RENTAL RESIDENCE:

4 - 36 UNIT/BLDG = 144 UNITS
TOTAL UNITS = 384 UNITS

- NET RESIDENTIAL DENSITY = 15.56 UNITS/ACRE - TOTAL SITE DENSITY = 10.06 UNITS/ACRE

### PARKING SUMMARY

- ELDERLY APARTMENTS: UNDERGROUND = SURFACE = 50 187 (1.36/UN**I**T) TOTAL = - SENIOR TOWNHOMES: GARAGE = TOTAL= 48 (2/UNIT) - ELEVATOR, UNDERGROUND PARKING, RENTAL RESIDENCE: UNDERGROUND = SURFACE GARAGES = 54 SURFACE = 286 (1.99/UNIT) TOTAL = - ROWHOUSE: 106 106 (2/UN**I**T) GARAGE = TOTAL = NOTE: VISITOR PARKING FOR SENIOR TOWNHOMES & ROWHOUSES IS PROVIDED IN

## ELDERBERRY NEIGHBORHOOD DEVELOPMENT PLAN EXCERPTS

DRIVEWAY IN FRONT OF EACH UNITS GARAGE.

### Plan Goals & Objectives:

- CLUBHOUSE:

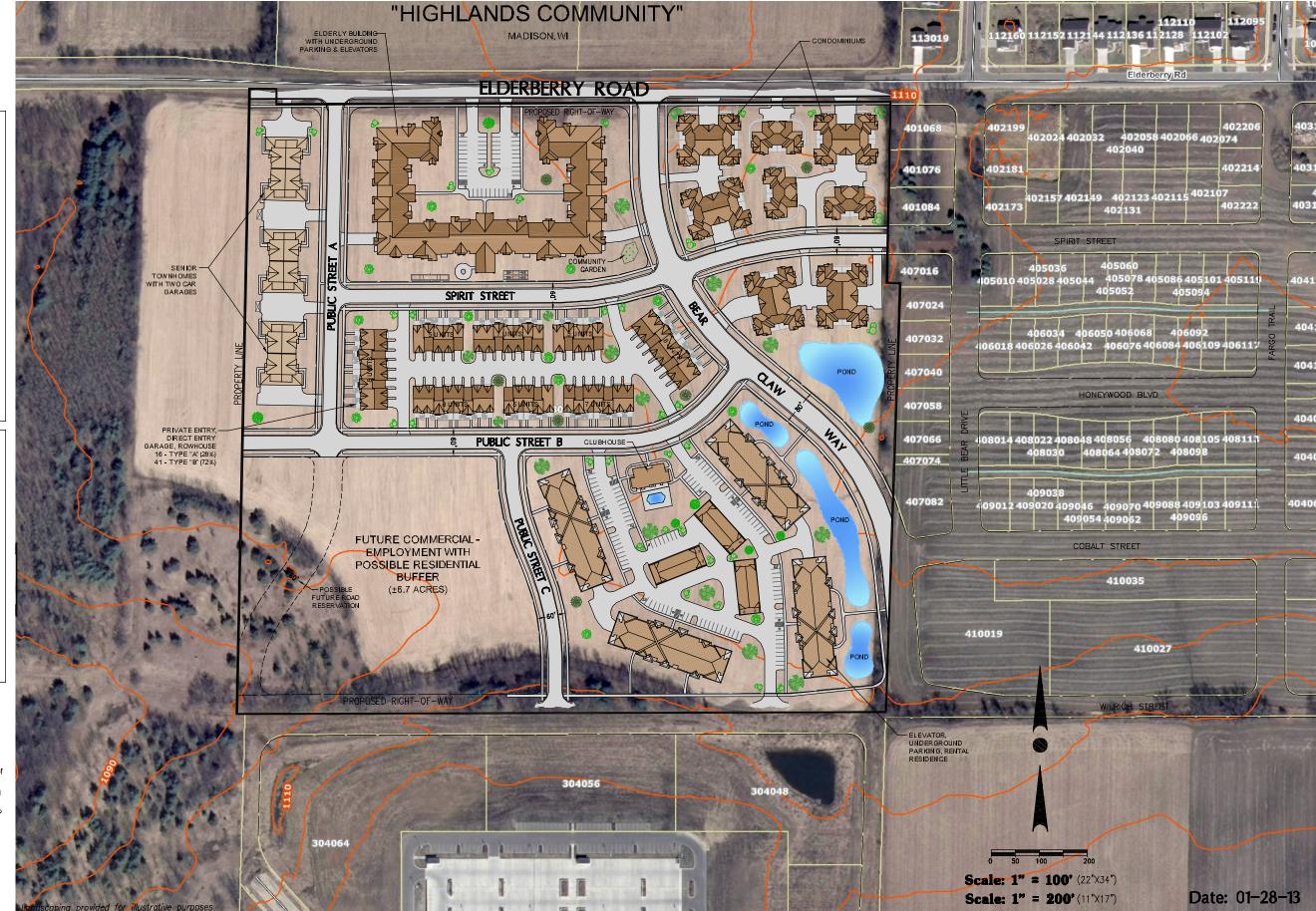
- Encourage a mix of land uses and land use patterns within the neighborhood.
- Encourage a broad range of housing types, densities, tenures, prices
  and rents within the neighborhood and provide this range to <u>all</u> parts of
  the neighborhood.
- It is proposed that a variety of housing types and densities be provided
  in all parts of the neighborhood. However, most of the medium and
  low-medium density housing is proposed at locations relatively close to
  the commercial centers or to major parks or open space, so that
  walking distances to neighborhood activity centers are minimized for
  the largest number of residents.
- The proposed public street network is designed to create relatively small blocks and high degree of interconnection... In general, it is recommended that both multi-family and single family developments seek to work within the recommended street system.
- The basic street pattern is "grid-like," and it is recommended that both
  commercial and residential developments maintain a strong
  relationship to the public street and sidewalk system.

# **CONCEPT PLAN #22**

**PROPOSED** 

This Concept Plan reflects several items discussed at the 10/4/12 meeting with the City of Madison and incorporates the central area Rowhouses designed by AG Architecture.

UNITED FINANCIAL GROUP, INC. 660 W. Ridgeview Drive Appleton, WI 54911



### **LENDERS**

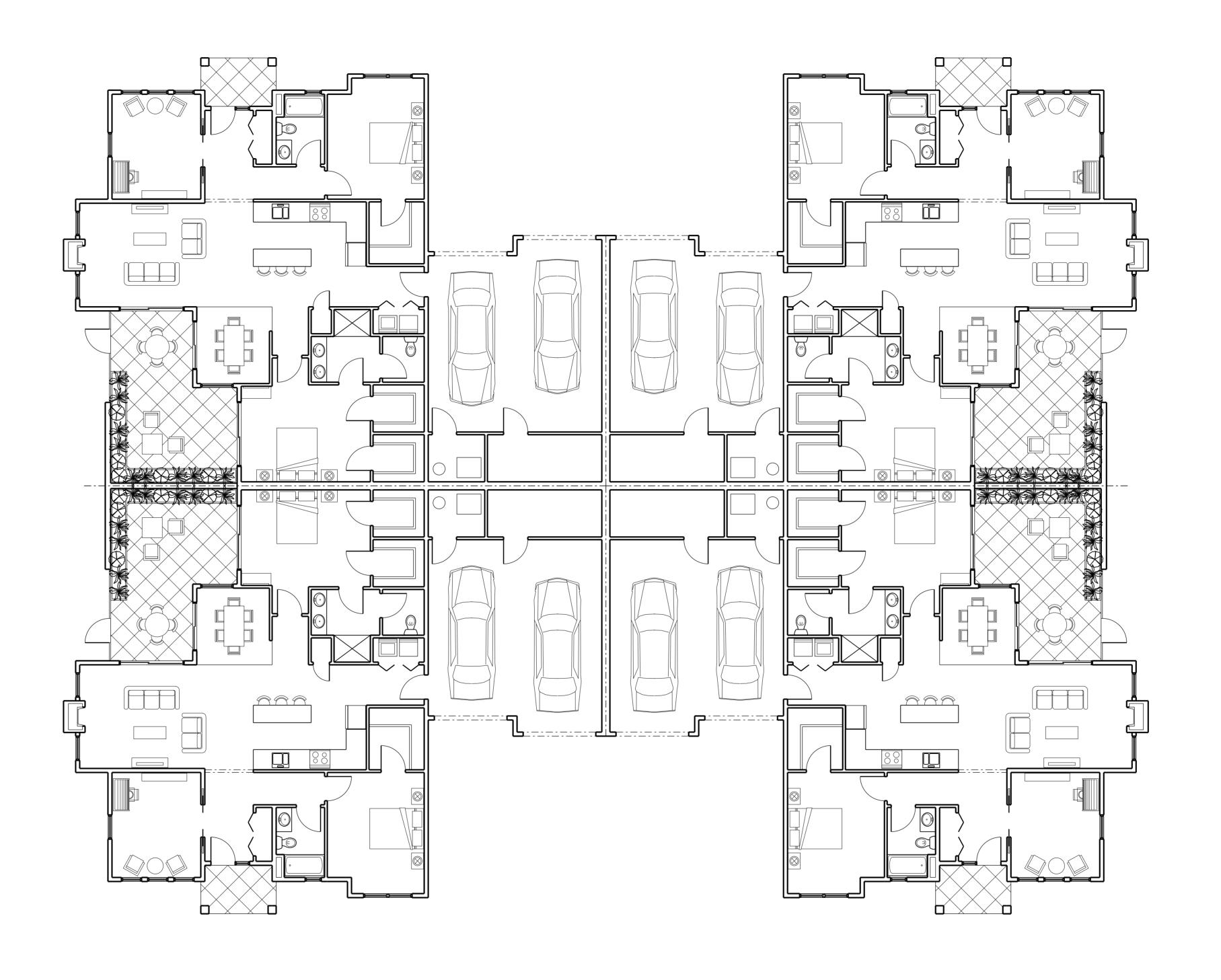
Mr. David L. Blohm, President American National Bank-Fox Cities 2200 N. Richmond Street Appleton, WI 54911 (920) 739-1040 Banking relationship since 1981	Craig O. Henes Vice President Commercial Lending Associated Bank, N.A. 401 E. Kilbourn Ave., Suite 350 Milwaukee, WI 53202 (414) 283-2244 Banking relationship since 1983	Ms. Lisa A. Lindsay Director / GSE Placements M&I, a branch of BMO Harris Bank 770 North Water Street Milwaukee, WI 53202 (414) 765-7583 Lending relationship since 1993	Mr. James M. Cope Senior Vice President Grandbridge Real Estate Capital, LLC 20975 Swenson Drive   Suite 325 Waukesha, Wisconsin 53186 (262)785-8441 Lending relationship since 1994
Mr. Thomas M. Vanden Hogen Vice President-Commercial Lending US Bank, N.A. P. O. Box 2819 Appleton, WI 54913-2819 (920) 830-6082 Banking relationship since 1984	Mr. Daniel J. Nisler Executive Vice President American National Bank-Fox Cities 2200 N. Richmond Street Appleton, WI 54911 (920) 739-1040 Banking relationship since 1981	Ms. Mary Wright, Director Multifamily Housing Group Mr. Bill Boerigter, Manager Mr. Shreedhar Ranabhat, Asst Manager Wisconsin Housing and Economic Development Authority P. O. Box 1728 Madison, WI 53701-1728 (608) 267-1450; (608) 267-7749 Lending relationship since 1992	

### LAND SELLERS

Mr. Vincent J. Baum N 2987 Herman Lane Hortonville, WI 54944 (920) 779-0379 Sold 57 acres land in Appleton 06/18/91	Mr. Gerald Hemmerich 8462 Cty Hwy BC Sparta, WI 54656 (608) 269-7577 Sold 20 acres land in Menomonee Falls 08/27/97	Ms.Paulette Manfrin 2301 Summit Avenue Waukesha, WI 53186 (262) 650-9880 Sold 80 acres land in Menomonee Falls 04/18/95	John and Robert Kukuwich W245 S6015 Red Wing Drive Waukesha, WI 53189 (414) 574-0605 (John) (262) 723-1735 (Robert) Sold 54 acres land in Franklin, WI 08/06/98
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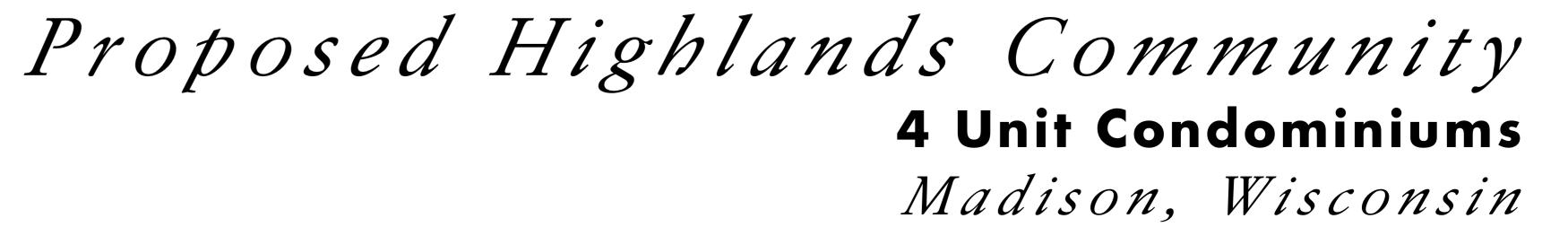
### **GOVERNMENTAL AGENCIES APPROVING DEVELOPMENTS**

Mr. Robert Buckingham, Community Development Director Town of Grand Chute, WI (920) 832-1599  Ms. Jane F. Carlson, Town Clerk – Brookfield, WI (262) 796-3788	
1 Town of Grand Child VVI (471) 832-1599 1 (262) 796-3788	
Zoning and Site Plan Approvals – Ridgeview Highlands & single family plat  Mr. Gary Lake, Building and Zoning Administrator (262) 796-	3790
Zoning and Site Plan Approvals – Meadow Creek Townhomes   Site Plan Approvals – Brookfield Highlands	
Mr. Matt Carran, Director of Community Development  Mr. Jack Chiovatero, Mayor, City of New Berlin, WI	
Village of Menomonee Falls,WI (262) 532-4274 (262) 797-2441	
Rezoning and Site Plan Approvals – Wildwood Highlands and Wildwood Lake Zoning and Site Plan Approvals – Parkwood Highlands and Site	nale
family plat	3
Mr. Ken Pabich , Planning and Economic Development Director Mr. John M. Bennett, City Engineer, Franklin, WI	
City of De Pere, WI (920) 339-4043 (414) 425-7510	
Nicolet Highlands selected by De Pere's Redevelopment Authority from five Zoning and Site Approvals – Foresthill Highlands and single fa	mily plat
competitive senior housing proposals Single family subdivision completed and sold out during 2003.	
Mr. Robert Strong, Community Development Director  Mr. Chris Haese, Community Development Director	
City of Green Bay, WI (920) 448-3413 City of Neenah (920) 886-6125	11.1.
Zoning and Site Plan Approvals for Parkway Highlands Site Plan Approvals – The Highlands At Mahler Park	
Mr. Keith Donner, Interim Administrator/ Public Works Director  Mr. Steve Voelkert, Village Administrator	
Village of Weston (715) 241-2610 Mr. John Rogers, Village President – Winneconne	
Ms. Jennifer Higgins, Community Development Director (715) 241-2638 (920)582-4381	
Site Plan Approvals – Birchwood Highlands Site Plan Approvals – Highlands at River Crossing	
Ms. Kim Tollefson, Director of Community Development	
City of Mequon (262) 236-2903	
Mr. Jac Zader, Asst. Director of Community Development (262)236-2904	
Site Plan Approvals - Highlands at Riverwalk	



Floor Plan

SCALE: 1/8' - 1'-0'











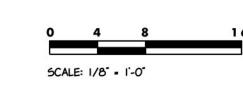


Proposed Highlands Community
4 Unit Condominium

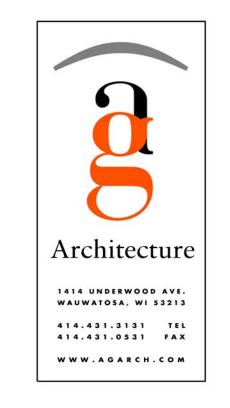
Madison, Wisconsin

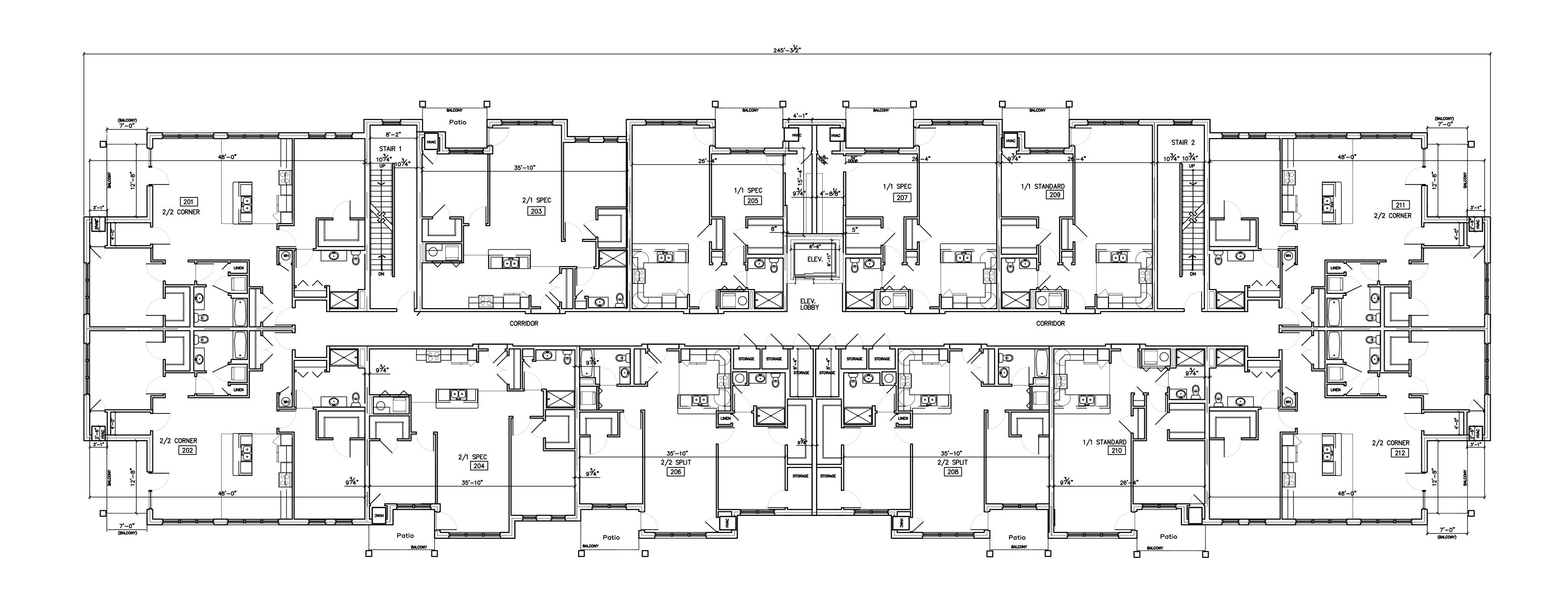






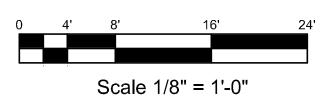
# Proposed Highlands Community Senior Apartments Madison, Wisconsin

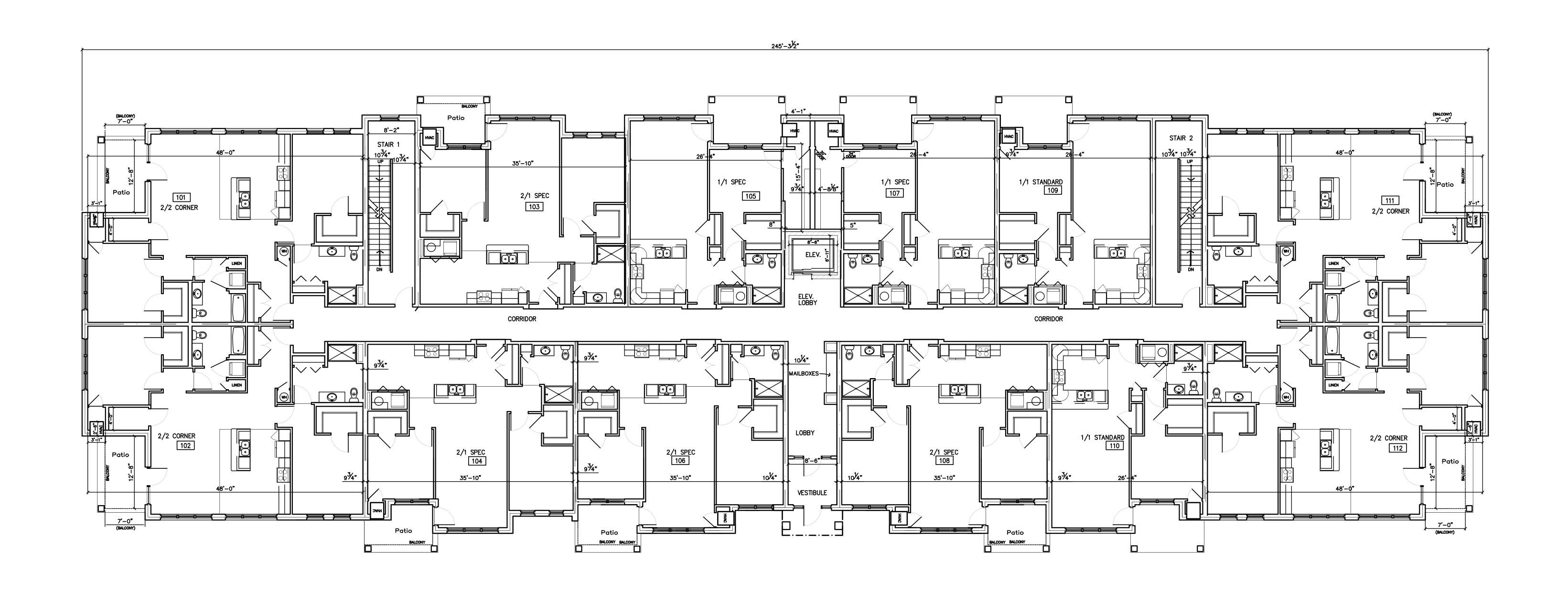




# Proposed Highlands Community

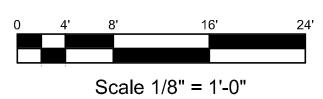
36-Unit Rental Residences Madison, Wisconsin Second Floor Plan

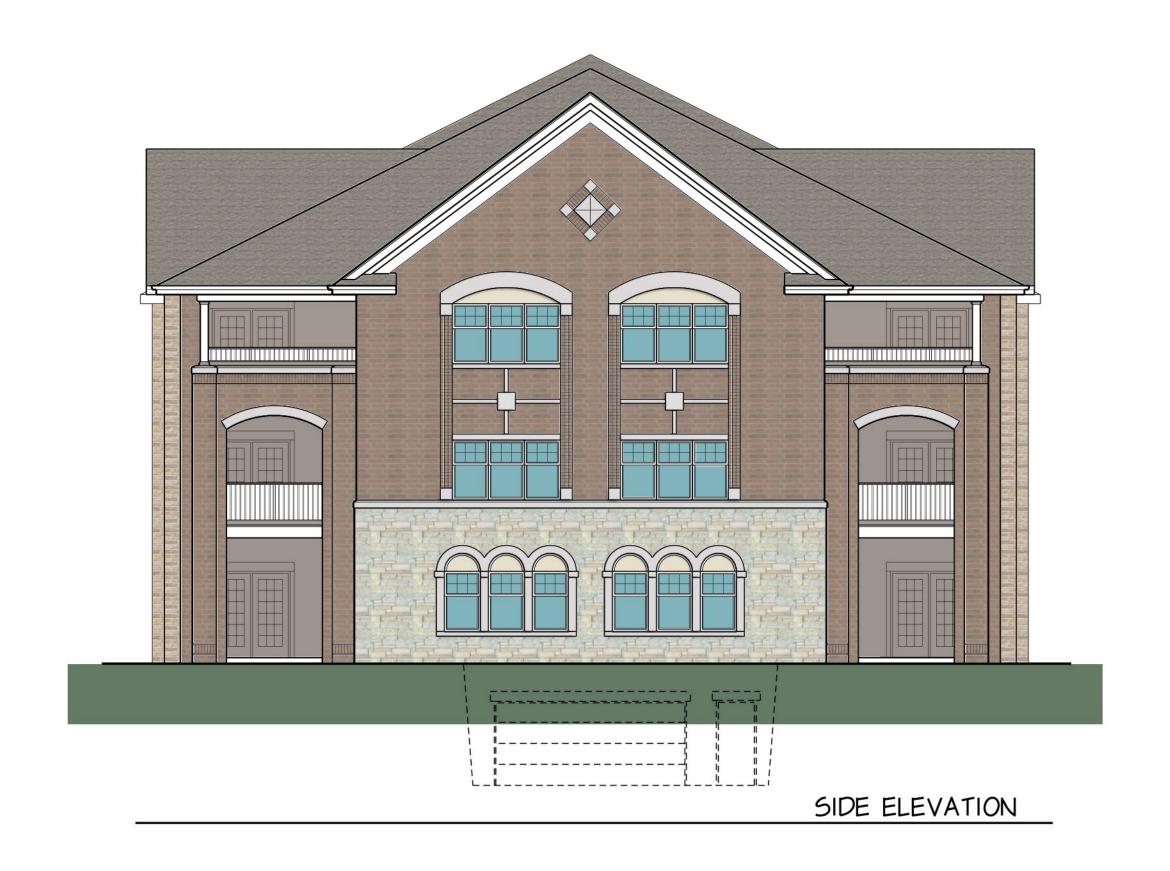




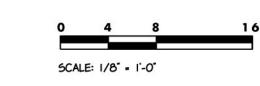
# Proposed Highlands Community

36-Unit Rental Residences Madison, Wisconsin First Floor Plan









# Proposed Highlands Community 36 Unit Apartments Madison, Wisconsin

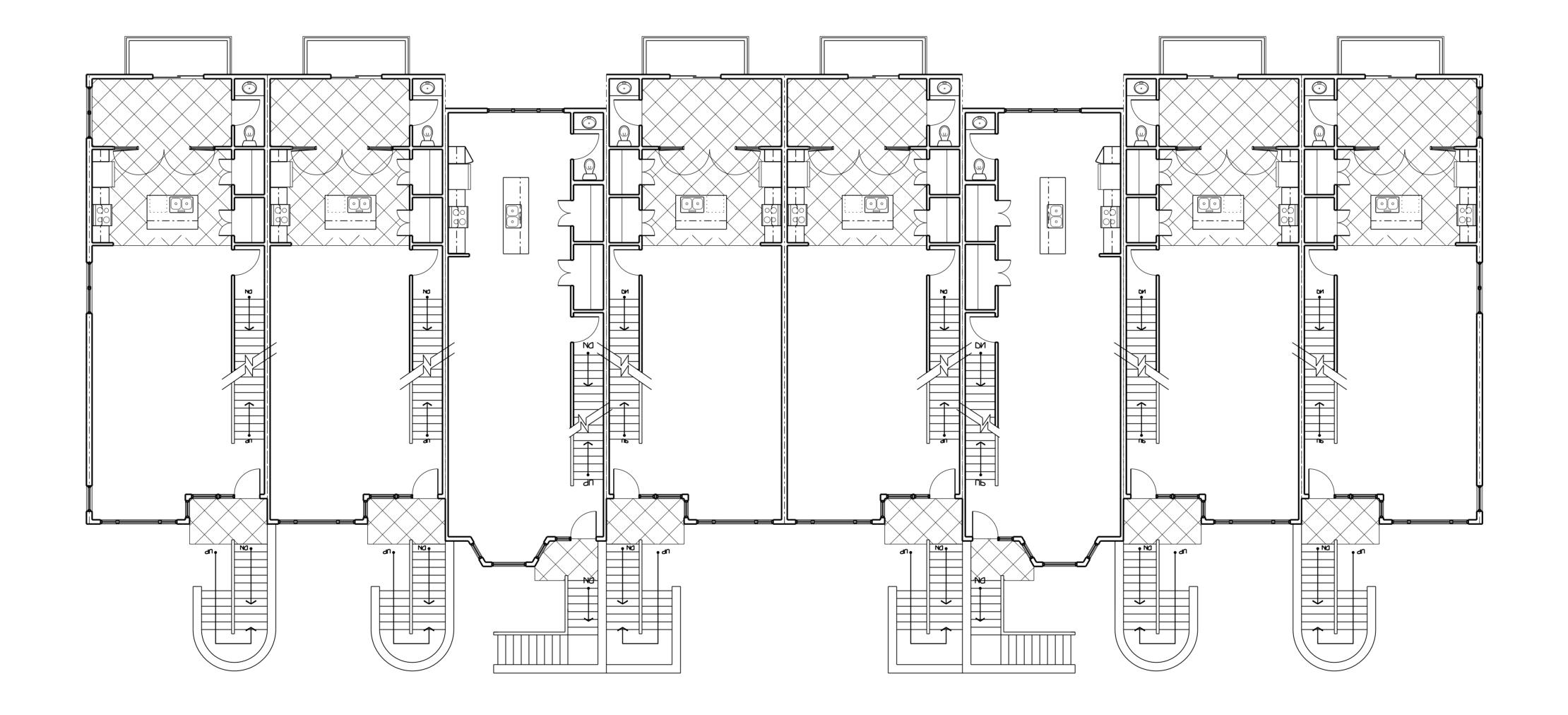






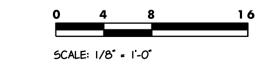


Proposed Highlands Community
8 Unit Rowhouses
Madison, Wisconsin



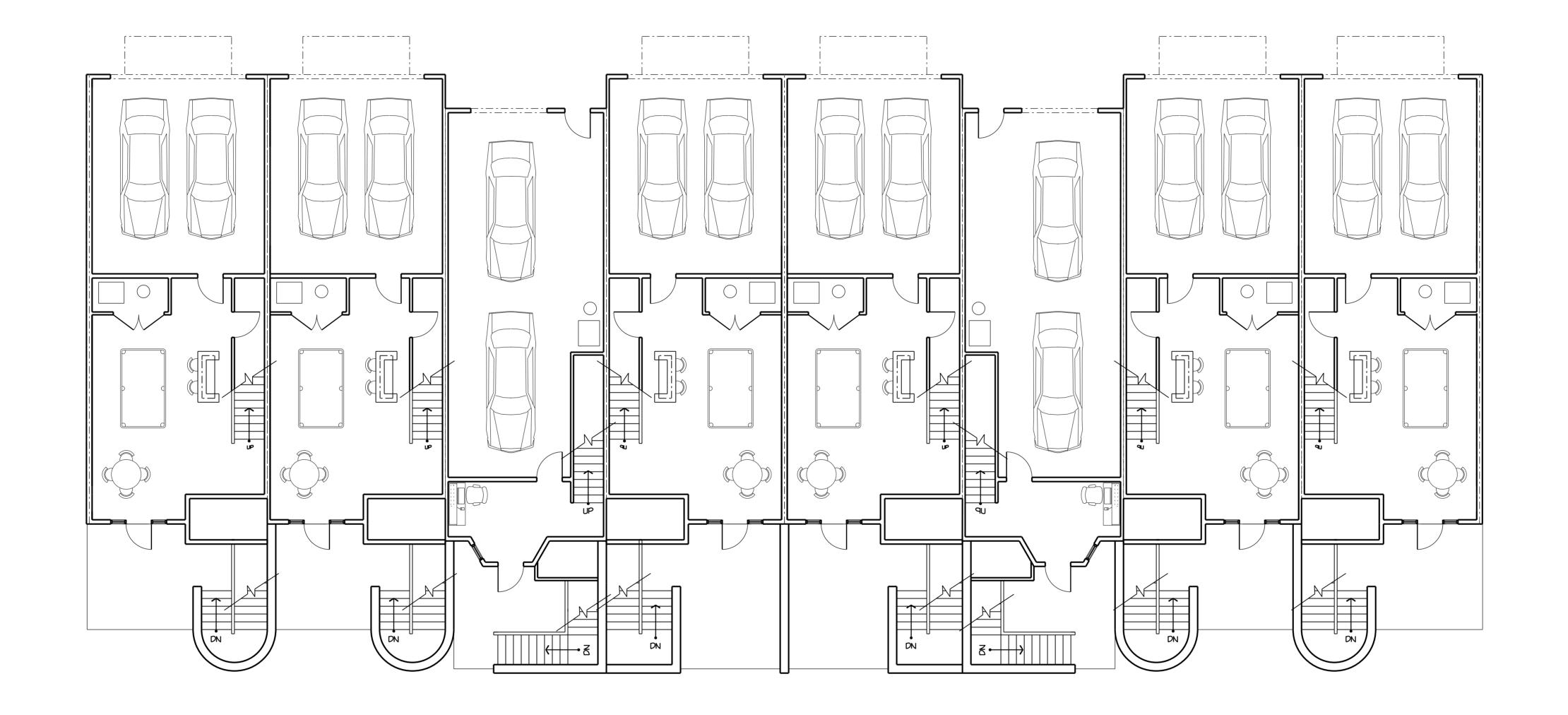
Second Floor Plan

Scale: 1/8\* - 1'-0'



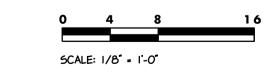
Proposed Highlands Community 8 Unit Rowhouses Madison, Wisconsin





First Floor Plan

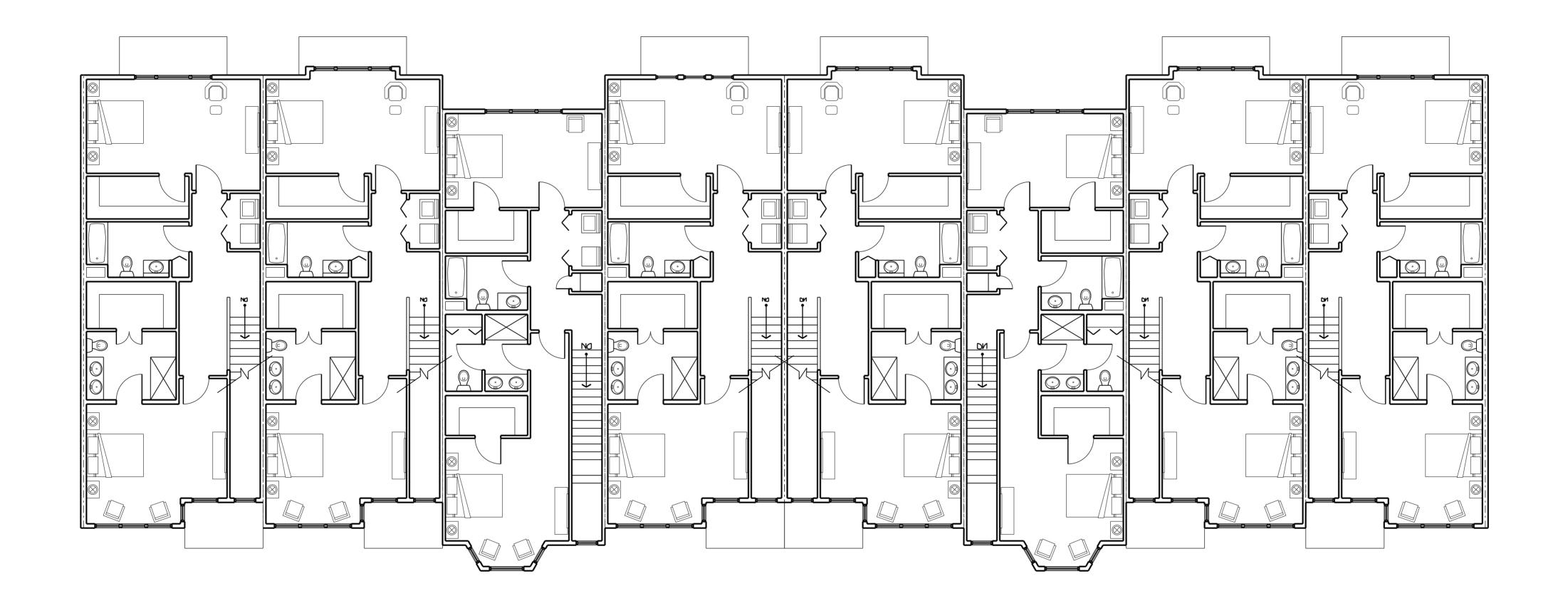
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Proposed Highlands Community 8 Unit Rowhouses Madison, Wisconsin

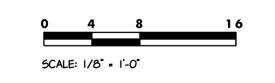
29 Jan 2013





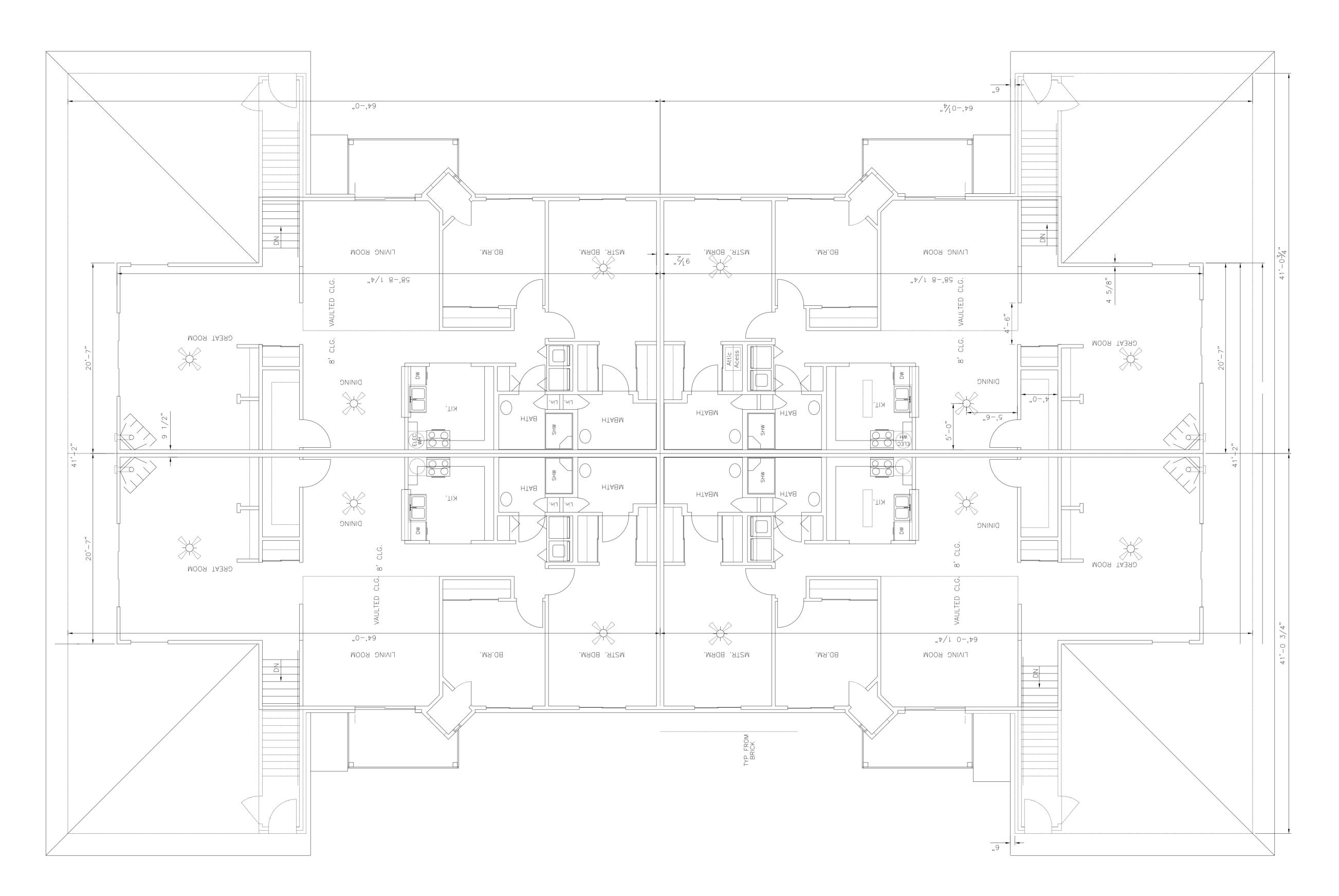
Third Floor Plan

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Proposed Highlands Community 8 Unit Rowhouses Madison, Wisconsin



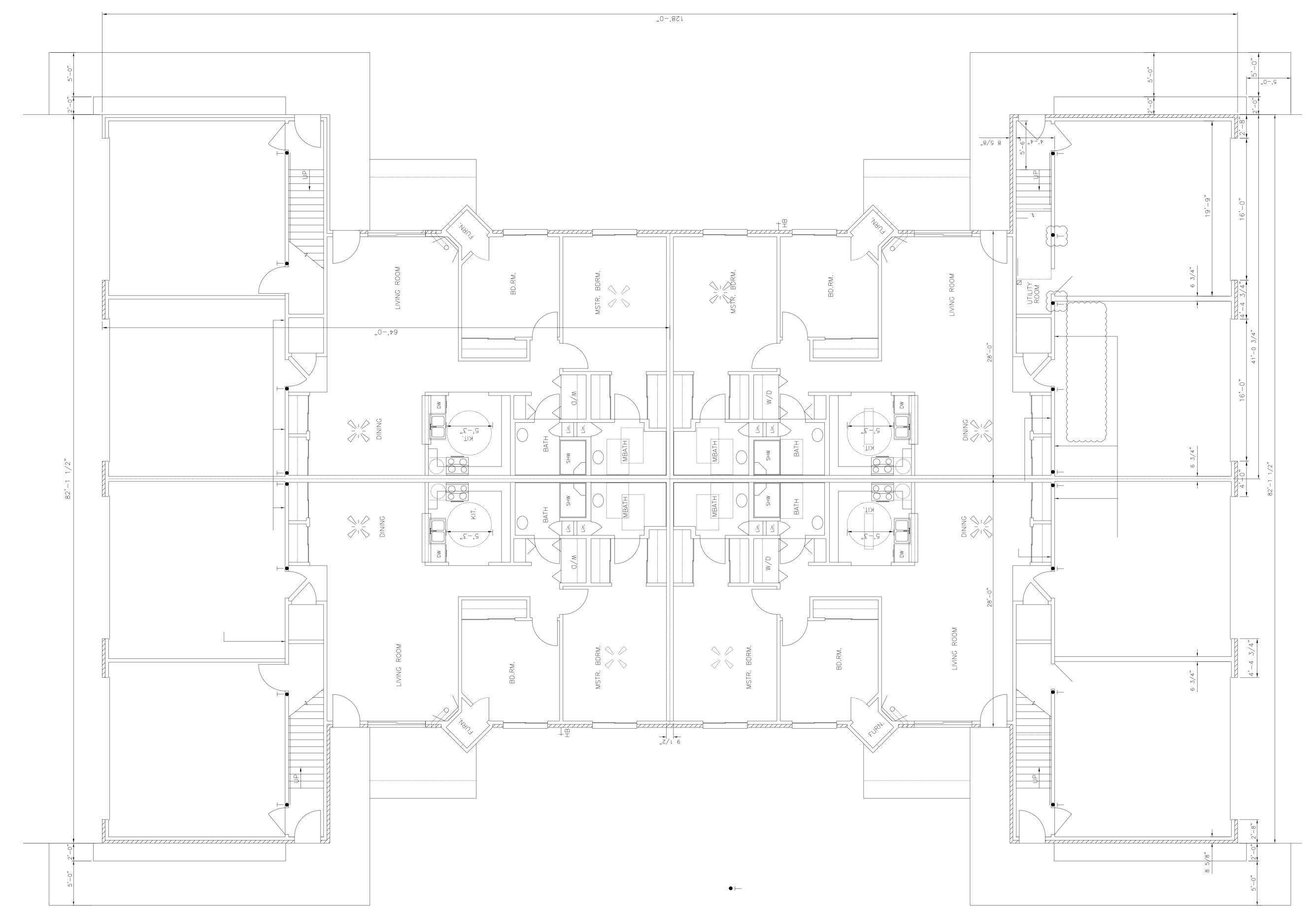


Prepared by: Schuler & Associates, Inc.





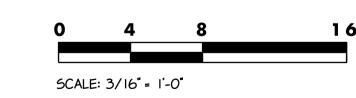
Proposed Highlands Community
8 Unit Townhomes Madison, Wisconsin



Prepared by: Schuler & Associates, Inc.

First Floor Plan

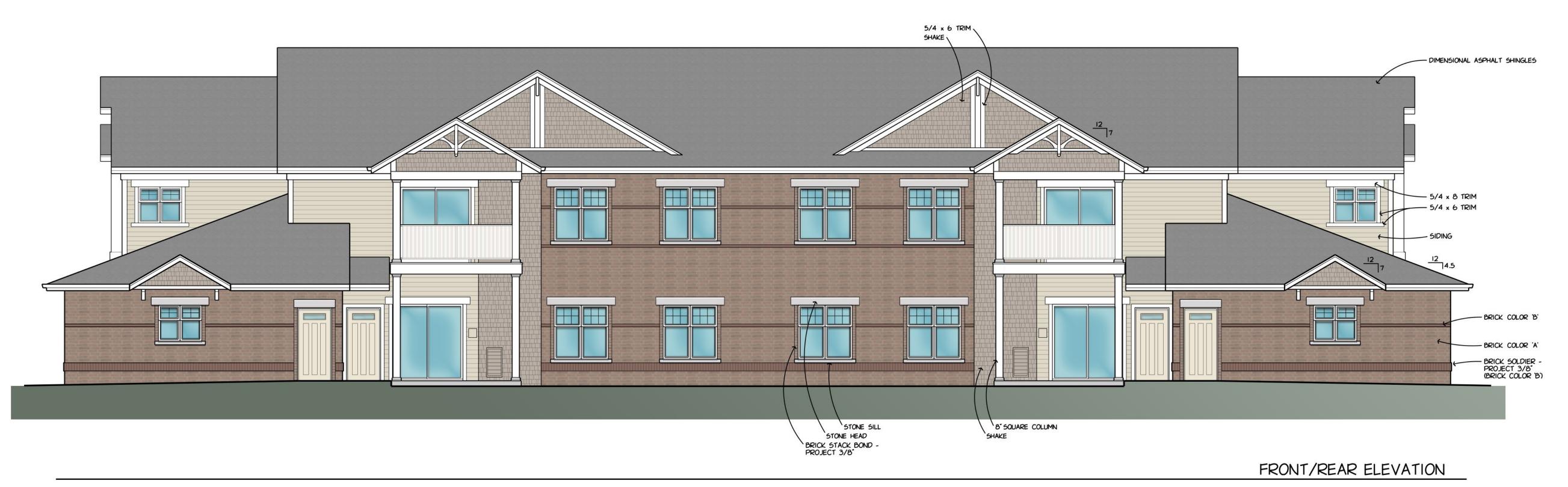
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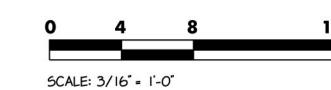
Proposed Highlands Community
8 Unit Townhomes Madison, Wisconsin



SIDE ELEVATION



29 Jan 2013



# Proposed Highlands Community 8 Unit Senior Townhomes Madison, Wisconsin

