



**SUBDIVISION APPLICATION**

**Madison Plan Commission**

215 Martin Luther King Jr. Blvd; Room LL-100  
 PO Box 2985; Madison, Wisconsin 53701-2985  
 Phone: 608.266.4635 | Facsimile: 608.267.8739

Date Stamp

**\*\* Please read both pages of the application completely and fill in all required fields\*\***  
 This application form may also be completed online at [www.cityofmadison.com/planning/plan.html](http://www.cityofmadison.com/planning/plan.html)

**1a. Application Type.** (Choose ONE)

Preliminary Subdivision Plat     Final Subdivision Plat     Land Division/ Certified Survey Map (CSM)  
 If a Plat, Proposed Subdivision Name: Woodstone

**1b. Review Fees.** Make checks payable to "City Treasurer."

For Preliminary and Final Plats, an application fee of \$200, plus \$35 per lot and outlot contained on the plat drawing.  
 For Certified Survey Maps, an application fee of \$200 plus \$150 per lot and outlot contained on the certified survey map.

**2. Applicant Information.**

Name of Property Owner: Pheasant Ridge LLC    Representative, if any: Dan Heffron  
 Street Address: 2000 Prairie Street #200    City/State: Prarie du Sac, WI    Zip: 53578  
 Telephone: (608) 643-8525    Fax: (608) 643-2793    Email: dan@heffrongroup.com

Firm Preparing Survey: MSA Professional Services    Contact: Jason Valerius  
 Street Address: 2901 International Lane    City/State: Madison, WI    Zip: 53704  
 Telephone: (608) 242-7779    Fax: (608) 242-5664    Email: jvalerius@msa-ps.com

Check only ONE - ALL Correspondence on this application should be sent to:     Property Owner     Survey Firm

**3a. Project Information.**

Parcel Address: 7197 Elderberry Road    in the City or Town of: Madison  
 Tax Parcel Number(s): \*070821485200, \*070821486108, \*070821485109    School District: Madison  
 Existing Zoning District(s): Ag    Development Schedule: Fall 2008 - Spring 2011  
 Proposed Zoning District(s) (if any): RAT/PUD    Provide a Legal Description of Site on Reverse Side

**3b. For Surveys Located Outside the Madison City Limits and in the City's Extraterritorial Jurisdiction:**

Date of Approval by Dane County: \_\_\_\_\_ Date of Approval by Town: \_\_\_\_\_

In order for an extraterritorial request to be accepted, a copy of the approval letters from both the town and Dane County must be submitted.

Is the subject site proposed for annexation?     No     Yes    If YES, approximate timeframe: \_\_\_\_\_

**4. Survey Contents and Description.** Complete table as it pertains to the survey; do not complete gray areas.

Use	lots	outlots	Ac
Residential	105		35.69
Retail/Office			
Industrial			
Outlots Dedicated to City		2	3.12
Homeowner Assoc. Outlots			
Other (state use)			
<b>TOTAL</b>	<b>105</b>	<b>2</b>	<b>38.81</b>

Business Use of Individual Land Lots on the Survey

OVER →

5. **Required Submittals.** Your application is required to include the following (check all that apply):



**Surveys** (prepared by a Registered Land Surveyor):

- For **Preliminary Plats**, eighteen (18) copies of the drawing drawn to scale are required. The drawing is required to provide all information as it pertains to the proposed subdivision as set forth in Section 16.23 (7)(a) of the Madison General Ordinances. The drawings shall include, but are not limited to, a description of existing site conditions and natural features, delineation of all public and private utilities that serve the site (denote field located versus record drawings), the general layout of the proposed subdivision, the dimensions of lots and outlots, widths of existing and proposed rights of way, topographic information, and any other information necessary for the review of the proposed subdivision.
- For **Final Plats**, sixteen (16) copies of the drawing are required to be submitted. The final plat shall be drawn to the specifications of Section 236.20 of the Wisconsin Statutes.
- For **Certified Survey Maps (CSM)**, sixteen (16) copies of the drawing are required. The drawings shall include all of the information set forth in Sections 16.23 (7)(a) and (d) of the Madison General Ordinances, including existing site conditions, the nature of the proposed land division and any other necessary data. Utility data (field located or from utility maps) may be provided on a separate map submitted with application.
- All surveys submitted with this application are required to be collated, stapled and folded so as to fit within an 8 1/2" X 14" case file. In addition, an 8-1/2 X 11 inch reduction of each sheet must also be submitted.



**Report of Title and Supporting Documents:** All plats and certified surveys submitted to the City of Madison for approval shall include a Report of Title satisfactory to the Real Estate Division as required in Section 16.23 of the Madison General Ordinances. A minimum of two (2) copies of the City of Madison standard 60/30 year Report of Title shall be obtained from a local, reputable title insurance company. **Title insurance or a title commitment policy is NOT acceptable** (i.e. a Preliminary Title Report or a Record Information Certificate). The owner or applicant must deliver a **third copy** of the Report of Title to the survey firm preparing the plat or CSM. The applicant shall submit a copy of all documents listed in the Report of Title for each copy of the report submitted.



**For Residential Preliminary Plats ONLY:** If the proposed project will result in ten (10) or more dwelling units, it is required to comply with the City's Inclusionary Zoning requirements under Section 28.04 (26) of the Zoning Ordinance. A separate **INCLUSIONARY ZONING DWELLING UNIT PLAN APPLICATION** explaining the project's conformance with these ordinance requirements shall be submitted with your application.



**For Surveys Creating Residential Lots:** The applicant shall include a certified copy of the accepted option or offer, including all terms of the purchase and any other information that may be deemed necessary by the Real Estate Division to assist them in determining Fair Market Value for the purpose of establishing park fees.



**For Surveys Outside the Madison City Limits:** A copy of the approval letters from both the town in which the property is located and Dane County must be submitted with your request. The City of Madison may not consider a survey within its extraterritorial jurisdiction without it first having been approved by the town and Dane County.



**For Surveys Conveying Land to the Public:** A Phase I Environmental Site Assessment Report may be required if any interest in these lands are to be conveyed to the public. Please contact the City's Real Estate Division at 267-8719, ext. 305 for a determination as soon as possible.



**Completed application and required Fee** (from Section 1b on front): \$ 3,945 Make all checks payable to "City Treasurer."



**Electronic Application Submittal:** All applicants are required to submit a copy of the completed application form, legal description and preliminary and/or final plats or certified survey map as individual Adobe Acrobat PDF files compiled either on a non-returnable CD-ROM to be included with their application materials, or in an e-mail sent to [pcapplications@cityofmadison.com](mailto:pcapplications@cityofmadison.com). The e-mail shall include the name of the project and applicant. Applicants unable to provide the materials electronically should contact the Planning Unit at 266-4635 for assistance.

The signer attests that this application has been completed accurately and all required materials have been submitted:

Applicant's Printed Name Daniel B. Heffron Signature *Daniel B. Heffron*  
Date 2/6/08 Interest in Property On This Date 11/30/07



**PART 1 - DEVELOPMENT INFORMATION:**

Project or Plat Woodstone  
 Project Address: 7197 Eiderberry Road Project Area (in acres): 38.81  
 Developer: Pheasant Ridge LLC Representative: Dan Heffron  
 Street Address: 2000 Prairie Street #200 City/State: Prairie du Sac, WI Zip: 53578  
 Telephone: (608) 643-8525 Fax: (608) 643-2793 Email: dan@heffrongrp.com  
 Agent, if Any: Jason Valerius Company: MSA Professional Services  
 Street Address: 2901 International Lane #300 City/State: Madison, WI Zip: 53704  
 Telephone: (608) 242-7779 Fax: (608) 242-5664 Email: jvalerius@msa-ps.com

**PART 2 - PROJECT CONTENTS:**

Complete the following table as it pertains to this project:

Residential Use	MARKET-RATE UNITS		INCLUSIONARY UNITS		Total Units	Acres
	Owner-Occupied Units	Renter-Occupied Units	Owner-Occupied Units	Renter-Occupied Units		
Single-Family	98	75	13	—	2088	15.75
Duplexes	15	20	3	—	38	4.75
Multi-Family	27	30	5	—	62	6.12
<b>TOTAL</b>	<b>119</b>	<b>50</b>	<b>21</b>	<b>—</b>	<b>190</b>	<b>26.62</b>

**PART 3 - AFFORDABLE HOUSING DATA:**

Number of Inclusionary Dwelling Units Proposed by Area Median Income (AMI) Level and Minimum Sale/Rent Price							
Owner-Occupied Units	30%	40%	50%	60%	70%	80%	Total
Number at Percent of AMI					7	14	21
Anticipated Sale Price					\$133,448	\$162,540	
Rental Units	30%	40%	50%	60%	70%	80%	Total
Number at Percent of AMI			N.A.				
Maximum Monthly Rent Price							

**PART 4 - DWELLING UNIT COMPARISON:**

Complete the following table as it pertains to this project:

	MARKET-RATE UNITS					INCLUSIONARY UNITS				
	Studio/1Bdrm	1 Bdrms	2 Bdrms	3 Bdrms	4/More Bdrms	Studio/1Bdrm	1 Bdrms	2 Bdrms	3 Bdrms	4/More Bdrms
Owner-Occupied Units with:			45	47	27			21		
Minimum Floor Area:			1,350	1,600	2,000			1,200		
Rental Units With:			N.A.					N.A.		
Minimum Floor Area:										

CONTINUE →

**PART 5 - INCENTIVES:** Section 28.04 (25) of the Zoning Ordinance provides the opportunity for applicants in projects where affordable dwelling units are required or where the developer has agreed to pay money in lieu of inclusionary dwelling units, to receive one or more incentives as compensation for complying with the Inclusionary Zoning requirements. Each of the eleven incentives listed below are affixed a point value. The incentive points available to an applicant is dependent upon the number of affordable dwelling units proposed at the various area median income (AMI) levels. The program rewards projects both for having a higher number of affordable dwelling units provided at lower AMI levels, and for having a higher percentage of affordable dwelling units incorporated into the development. The incentive and the corresponding number of points available are listed below. (MAP=Maximum Available Points) Please mark the box next to the incentives requested.

Incentive	MAP	Incentive	MAP
<input type="checkbox"/> Density Bonus (varies by project)	3	<input type="checkbox"/> Cash subsidy from Inclusionary Zoning Special Reserve Fund up to \$5,000 per unit for units provided to families earning 60% AMI or less (for owner-occupied) or 40% AMI or less (for rental).	2
<input type="checkbox"/> Parkland Development Fee Reduction	1	<input type="checkbox"/> Cash subsidy from Inclusionary Zoning Special Reserve Fund of \$2,500 per onsite affordable unit in projects with 49 or fewer detached units or projects with four or more stories and 75% of parking provided underground.	2
<input type="checkbox"/> Parkland Dedication Reduction	1	<input type="checkbox"/> Neighborhood Plan preparation assistance	1
<input type="checkbox"/> Off-street Parking Reduction up to 25%	1	<input type="checkbox"/> Assistance obtaining housing funding information	1
<input type="checkbox"/> Non-City provision of street tree planting	1		
<input type="checkbox"/> One addl. story in Downtown Design Zones	1		
<input type="checkbox"/> Residential parking permits in a PUD/PCD	1		
<input type="checkbox"/> Incentives Not Assigned a Point Value by Ordinance (Explain): _____			

**PART 6 - WAIVER:** The Plan Commission may waive the requirement to provide inclusionary dwelling units in the development if the applicant can present clear and convincing financial evidence that providing the required number of inclusionary dwelling units on-site renders providing the required number of inclusionary units financially infeasible. In such a case, a developer may request a waiver to provide the units off-site, assign the obligation to provide the units to another party, or pay cash in lieu of the units, or any combination of the above. If the waiver is granted, the required units may be provided as new construction off-site in another development within one mile of the subject development; off-site units shall be provided at least 1.25 times the number of units if provided within the subject development. Off-site units must be constructed within one year of the time that they would have been constructed within the subject development. The applicant may opt to pay money into the Inclusionary Unit Reserve Fund based on contribution rates established in Section 28.04 (25) of the Zoning Ordinance. If provision of the inclusionary dwelling units through the waiver is still financially infeasible, the developer may seek a reduction in the percent of units to the point where the project becomes financially feasible. If such a waiver is requested, a detailed explanation shall be provided in the required project narrative demonstrating the financial infeasibility of complying with the ordinance requirements and the rationale for the alternative proposed.

- If a waiver is requested, please mark this box  and include all of the necessary information required by the Zoning Ordinance and IZ Program Policy & Protocols to support your request.

**PART 7 - APPLICANT'S DECLARATION:**

The signer shall attest that this application has been completed accurately and includes all requests for incentives or waivers; that they have attended both required pre-application staff meetings and given the required notice to the district alderperson and neighborhood association(s) prior to filing this application; and that all required information will be submitted on the corresponding application for zoning and/or subdivision approval by the Plan Commission. The applicant shall begin the declaration by stating below whether or not the project complies with the various requirements of the inclusionary zoning ordinance. Check the applicable box and provide any supporting

		Will not comply	Additional comments
Exterior Appearance of IDUs are similar to Market rate.	X		
Proportion of attached and detached IDU units is similar to Market rate.	X		
Mix of IDUs by bedroom size is similar to market rate.	X		

CONTINUE →

Criteria for Inclusionary Dwelling Unit (IDUs) (continued)	Will Comply	Will not comply	Additional comments
IDUs are dispersed throughout the project.	X		
IDUs are to be built in phasing similar to market rate.	X		
Pricing fits within Ordinance standards	X		
Developer offers security during construction phase in form of deed restriction.	X		
Developer offers enforcement for for-sale IDUs in form of option to purchase or for rental in form of deed restriction.	X		
Developer describes marketing plan for IDUs.		X	
Developer acknowledges need to inform buyers/renters of IDU status, responsibilities for notification.	X		
• Terms of sale or rent.		X	
	Yes	No	Additional comments
Developer has arranged to sell/rent IDUs to non-profit or CDA to meet IDU expectations.		X	
Developer has requested waiver for off-site or cash payment.		X	
Developer has requested waiver for reduction of number of units.		X	
Other:			

- The applicant discussed this development proposal with representatives from the Planning Unit, Zoning Administrator and Community Development Block Grant Office on: → 1/31/08
- The applicant presented a preliminary development plan for this project to the Interdepartmental Review Staff Team on: → 1/31/08
- The applicant notified Alderperson SKidmore of District 9 of this development proposal in writing on: → 8/30/07 / 1/29/08
- The applicant also notified \_\_\_\_\_ of the \_\_\_\_\_ neighborhood in writing on: → \_\_\_\_\_
- The Inclusionary Dwelling Unit Plan Application package contains ALL of the materials required as noted on this form. I, as the undersigned, acknowledge that incomplete or incorrect submittals may cause delays in the review of this project. I am also familiar with the ongoing developer responsibilities summarized on page #2 of this application and outlined in the Inclusionary Zoning Ordinance and Program Policy and Protocols.

Applicant Signature Jason Valerius Date 2/6/08  
 Printed Name Jason Valerius Phone (608) 242-6621

## I. Development Overview

Woodstone is a proposed subdivision development on the south side of Elderberry Road in the Elderberry Neighborhood Development Area. The land is bordered by undeveloped parcels on three sides, including land in the City of Madison on the east and west and land in the Town of Middleton to the south. The current owner is Pheasant Ridge LLC. Three parcels totaling 39.53 acres were attached to the City as of September 18, 2007.

The proposed plat features 104 lots, including 88 single-family lots, 9 individual condo twinhome lots, 2 grouped condo twinhome lots, 2 condo row-housing lots, and 1 multi-family apartment lot. While lot sizes vary, a typical lot will be 50' x 110' with an alley and 66.7' x 115' without.

Enclosed is a draft of the Conditions, Covenants, and Restrictions for the proposed subdivision, including Design Standards.

As required by the IZ ordinance, we are proposing 24 units for IZ designation, including 13 single family units, 6 twinhome condo units, and 5 townhome condo units. These lots and units are distributed throughout the development and will become available with the corresponding development phases. The Heffron Company will provide assistance to potential lot purchasers interested in IZ units.

Pheasant Ridge LLC plans on improving lots beginning in July of 2008 and hopes to have Phase 1 lots available for construction by the builder/purchaser beginning approximately in October of 2008. The developer is not requesting any offsets in order to meet the IZ regulations.

Enclosures:

- Draft Preliminary Plat
- Lot Sizes
- Inclusionary Zoning Land Use Restrictions (not enclosed – assistance from city staff)
- Covenants, Conditions, & Restrictions (CCRs)
- Design Guidelines
- Inclusionary Zoning Supplementary Application

### **III. Organizational Structure**

The Pheasant Ridge LLC will develop Woodstone. The majority of the lots (80%) will be sold to builders who will produce homes for their customers. The Pheasant Ridge LLC will develop the remaining 20% of the lots. Lots designated as Inclusionary Zoning Lots will have restrictive covenants attached to them to protect this status.

### **IV. Owner and Developer Identification**

The landowner is Pheasant Ridge LLC. Pheasant Ridge LLC will develop the infrastructure improvement and will act as the marketing agent. A majority of the lots will be sold to independent builders. Pheasant Ridge LLC will retain and develop approximately 20% of the total lots. Restrictive covenants on the IZ lots will require the builders to abide by the IZ Ordinance.

### **V. Project Schedule**

Infrastructure construction is scheduled to begin in July of 2008. The lots will be available for home construction beginning October of 2008.

The phasing of this development has not been determined, however the IZ lots will be sold proportionally to the market rate lots. This will be feasible since the IZ lots are mixed evenly throughout the development. An Inclusionary Zoning Land Use Restriction has not been included (awaiting assistance from city staff).

### **VI. Buildings and Architectural Character**

Design guidelines and standards will be established as part of the covenants, conditions, and restrictions (CCR's). Draft versions of these documents are attached in the subsequent pages.

## VII. IZ Identification

### A. Unit Sizing

Builders will construct homes to the specifications of their customers based on the current marketplace. In order to meet the requirements of the IZ Ordinance, the assumed bedroom sizes are as follows:

- Single Family unit = Two Bedrooms (min. of 1,600 sq.ft.)
- Condo Duplex unit = Two Bedrooms (min. of 1,600 sq.ft.)
- Townhome Condo unit = Two Bedrooms (min. of 1,600 sq.ft.)

### B. Projected Pricing

As stated in the IZ Ordinance, the pricing of the IZ homes will be based on the number of bedrooms in each home. Based on the formulas laid out in the ordinance, there will be twenty-one (24) owner-occupied IZ units in the development with sixteen (16) units that will be at 80% of the AMI and eight (8) units at 70% of the AMI.

### C. Location

The IZ units will be located on the following lots:

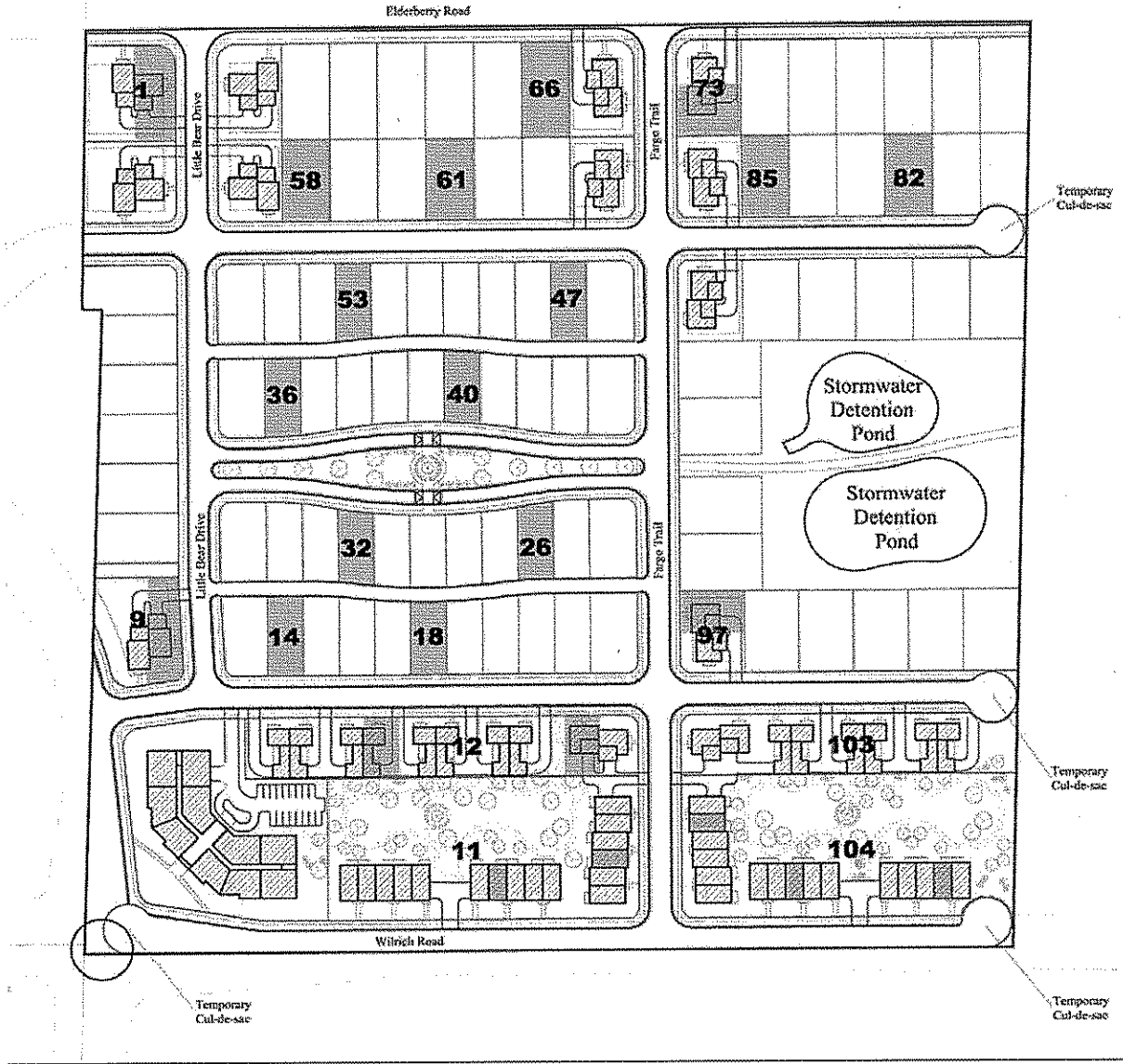
Lots: 1, 9, 11 (2 units), 12 (2 units), 14, 18, 26, 32, 36, 40, 47, 53, 58, 61, 66, 73, 82, 85, 97, 104 (3 units).

Plat Woodstone

County: Dane County, Wisconsin



D. IZ Unit Mix



**VIII. Incentives Requested**

The City of Madison offers incentives to enable compliance with the IZ Ordinance, however Pheasant Ridge LLC is not requesting any incentives in order to offset the loss incurred by restricting the sale price of the IZ units.