



City of Madison Master

City of Madison
Madison, WI 53703
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File Number: 00009

File Number: 00009

File Type: Ordinance

Status: Recessed Public Hearing

Version: 2

Reference: 37291

Controlling Body: COMMON COUNCIL

Requester: PLAN COMMISSION

Cost:

Introduced: 11/02/2004

File Name: rezone 1802-1864 Monroe Street

Final Action:

Title: SUBSTITUTE - Creating Section 28 06(2)(a)3028 of the Madison General Ordinances rezoning property from C1 Limited Commercial District and R2 Single-Family Residence District to PUD(GDP) Planned Unit Development (General Development Plan) District. Proposed Use: Demolish Commercial Buildings and Build 5-Story Mixed-Use Building with 12,000 Square Feet Commercial Space and 51 Condominium Units 10th Ald. Dist., 1802-1864 Monroe Street.

Notes: 3489monroeSUB
04-1633

Code Sections:

Agenda Date: 03/15/2005

Indexes:

Agenda Number:

Sponsors: Brenda K. Konkol

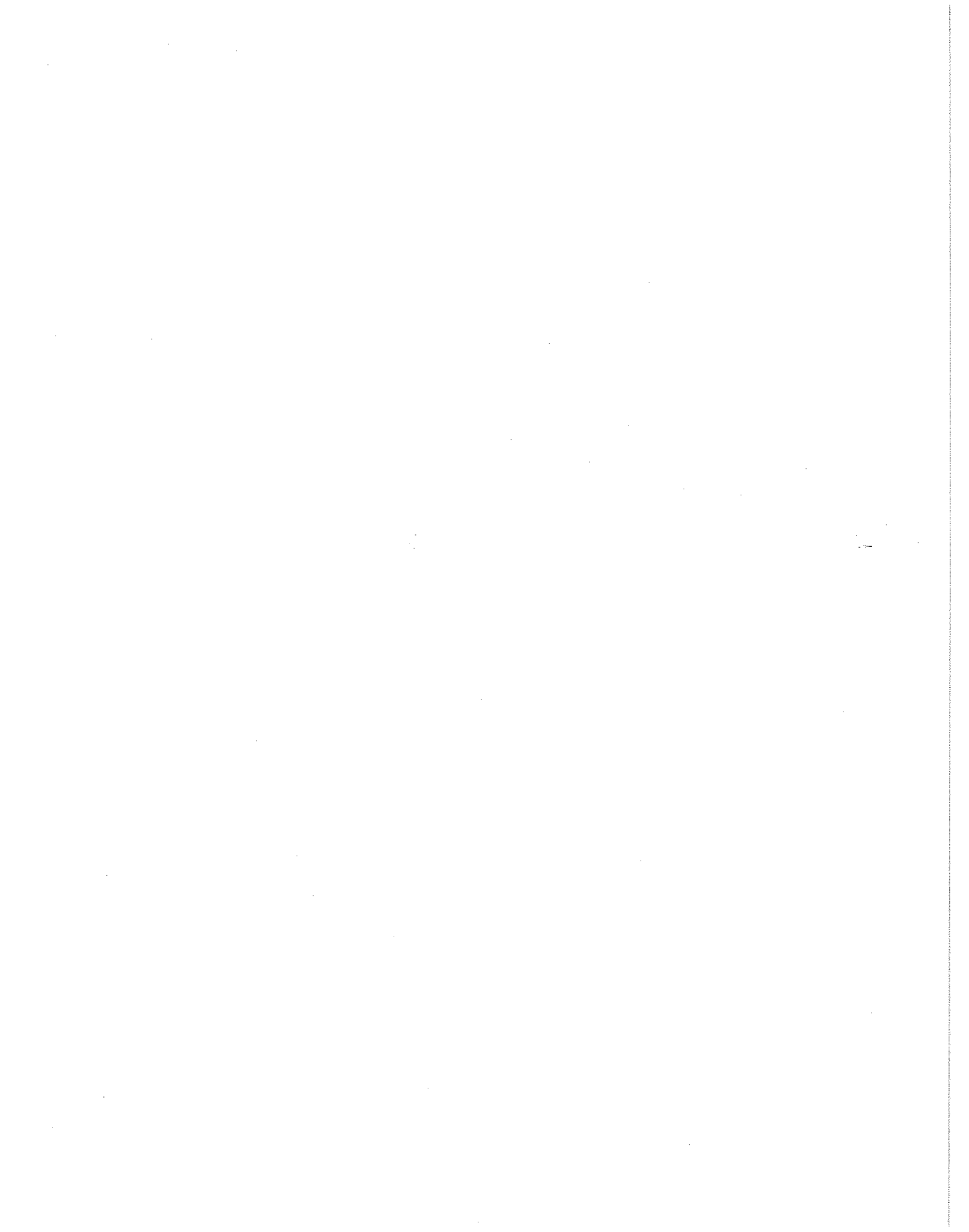
Enactment Date:

Attachments:

Enactment Number:

History of Legislative File

Version:	Acting Body:	Date:	Action:	Sent To:	Due Date:	Return Date:	Result:
1	Attorney's Office	12/09/2004	Approved As To Form				
	Notes: <i>Hard copy approval on file</i>						
1	Attorney's Office	12/10/2004	Refer	ZONING ADMINISTRATIO N	01/24/2005		
1	Attorney's Office	12/10/2004	Refer For Public Hearing	PLAN COMMISSION	01/24/2005	01/27/2005	
1	Attorney's Office	12/10/2004	Refer For Public Hearing	COMMON COUNCIL	02/01/2005		
1	Comptroller's Office/ Approval Group	12/10/2004	Approved Fiscal Note By The Comptroller's Office	PLAN COMMISSION		01/27/2005	
2	Attorney's Office/Approval Group	01/26/2005	Approved As To Form				
	Notes: <i>Substitute</i>						
2	Attorney's Office/Approval Group	01/26/2005	Fiscal Note Required / Approval	Comptroller's Office/Approval Group	01/26/2005		



Master Continued (00009)

- 2 Comptroller's Office/ Approval Group 01/27/2005 Approved Fiscal Note By The Comptroller's Office Attorney's Office
Notes: *approved by Bohrod*
- 2 Attorney's Office/Approval Group 01/27/2005 Approved As To Form
Notes: *Substitute offered as an alternate by Ald Konkel.*
- 2 PLAN COMMISSION 01/27/2005 RECOMMEND TO COUNCIL TO ADOPT (PUBLIC HEARING)
Notes: *The Plan Commission recommended adoption of the original ordinance*
- 2 COMMON COUNCIL 02/01/2005 Rerefer for Recessed Public Hearing COMMON COUNCIL 02/22/2005 Pass
Absent: Dilweg and Streit
Aye: Golden, Webber, Durocher, Kaysen and Paoni
Abstain: Konkel, Carlsen, Wong and Hoag
- 2 COMMON COUNCIL 02/22/2005 Rerefer for Recessed Public Hearing COMMON COUNCIL 03/15/2005 Pass
Absent: Dilweg and Streit
Aye: Golden, Webber, Durocher, Kaysen and Paoni
Abstain: Konkel, Carlsen, Wong and Hoag
-

Text of Legislative File 00009

..Fiscal Note

No expenditure required

..Title

SUBSTITUTE - Creating Section 28 06(2)(a)3028 of the Madison General Ordinances rezoning property from C1 Limited Commercial District and R2 Single-Family Residence District to PUD(GDP) Planned Unit Development (General Development Plan) District. Proposed Use: Demolish Commercial Buildings and Build 5-Story Mixed-Use Building with 12,000 Square Feet Commercial Space and 51 Condominium Units. 10th Ald. Dist., 1802-1864 Monroe Street

..Body

WHEREAS, a PUD(GDP) Planned Unit Development (General Development Plan) District has been duly filed for approval of the Madison Common Council and is hereby made an integral component of the zoning district regulations.

NOW, THEREFORE, the Common Council of the City of Madison do ordain as follows:

Paragraph 3028. of Subdivision (a) of Subsection (2) of Section 28 06 of the Madison General Ordinances is hereby created to read as follows:

"28.06(2)(a) 3028. The following described property is hereby omitted from the C1 Limited Commercial District and R2 Single-Family Residence District and added to the PUD(GDP) Planned Unit Development (General Development Plan) District:

All of Block 27, Plat of West Lawn, and All of Block 1, Evergreen Park Subdivision, City of Madison, Dane County, Wisconsin. This parcel contains approximately 40,028 square feet (0.92 acres) "

Agenda Item No. 3

Monroe Commons Project – Common Council Meeting 2/22/05 Emails forwarded from Ald. Ken Golden, District 10

1. From: katys@chorus.net
2/11/2005 5:16:48 PM

Dear Ms Konkel,

I've been on Monroe St. as a merchant for 21 years, and hope against hope you will (re)-consider your decision against the project as it was presented to us by the David Keller real estate group. I was thrilled with the idea of the possibility of a "high rise" with room for residents, businesses and a grocery, and so were most of my fellow businesses. I wish I better understood the objections you have. As a business, Valentine's Day is one day I can't leave my jewelry shop to come in person to the Munic. Bldg., so I'm emailing you with my plea to try, try, try to get us something soooooon!!

Katy Schalles

Katy's American Indian Arts, 1817 Monroe St. 251-5451

2. From: janus@janusgalleries.com
2/11/2005 6:41:18 PM

Dear Ken,

I am writing to voice my support of the development that has been presented, as it has been presented, for the Ken Kopps site. I am a business owner (Janus Galleries) at Knickerbocker Place, a few blocks west of the proposed project.

I like the plan, the residential/retail mix, and the fact that parking will not be an issue.

I think it will improve the neighborhood, and should be eligible for TIF funds.

Thank you for your consideration.

All the best, Pete

Peter C. Lundberg, Director

Janus Galleries / Fine Art from the 19th and Early 20th Centuries

Post Office Box 55156

Madison, Wisconsin 53705

608-271-2222

608-271-3310 FAX

janus@janusgalleries.com

<http://www.janusgalleries.com>

3. From: sbattenassoc@yahoo.com
2/11/2005 3:16:39 PM

I am the owner of Bodacious Boutique, an upscale women's apparel store located at 1719 Monroe Street. I opened my shop a little over a year ago. Since I am 60 years old and have invested my life savings (and then some) into this venture, I did a careful and thorough search as to where I would locate my store.

I chose Monroe Street because of its liaison between downtown, the campus, and higher income neighborhoods. I also chose Monroe Street because it is reflective of all that is creative, unique and "funky" about the city of Madison. The shopping district of Monroe is truly an asset, and should be recognized, utilized and improved as such, for any Monona Terrace, Hilton, Concourse, Sheraton, Overture or Alliant Energy convention that the city of Madison would like to attract.

The merchants on Monroe are individual Madison residents that have literally put their lives on the line and brought to the people of Madison the same upscale landscape that the Overture Center brings to the city. The street, also however, offers shoppers of any income level an alternative. The Monroe Commons Project is absolutely essential to ensure that the street thrives and grows so that the merchants can continue to offer residents and visitors unique, convenient shopping.

We are aware that the project will require TIF assistance, but it is the solution to a long overdue redevelopment of the existing "eye sore" Kopps building. Monroe Street merchants and all who shop there deserve the support of you and the city to make sure the Monroe Commons Project happens.

Thank you for your time.

Sheryl Batten
Bodacious Boutique

4. From: gchosy@chorus.net
2/12/2005 5:38:39 PM

Dear Ken,
As a Monroe St merchant I am writing to express my support of the Monroe Commons project. It is time something is done to prevent further blight in the neighborhood.

I request that you support the project.

Sincerely,

Karin Ketarkus, Director
Grace Chosy Gallery
825 Monroe St
Madison, WI 53711-2024
Phone: 608-255-1211

1802 -1804 Monroe Street

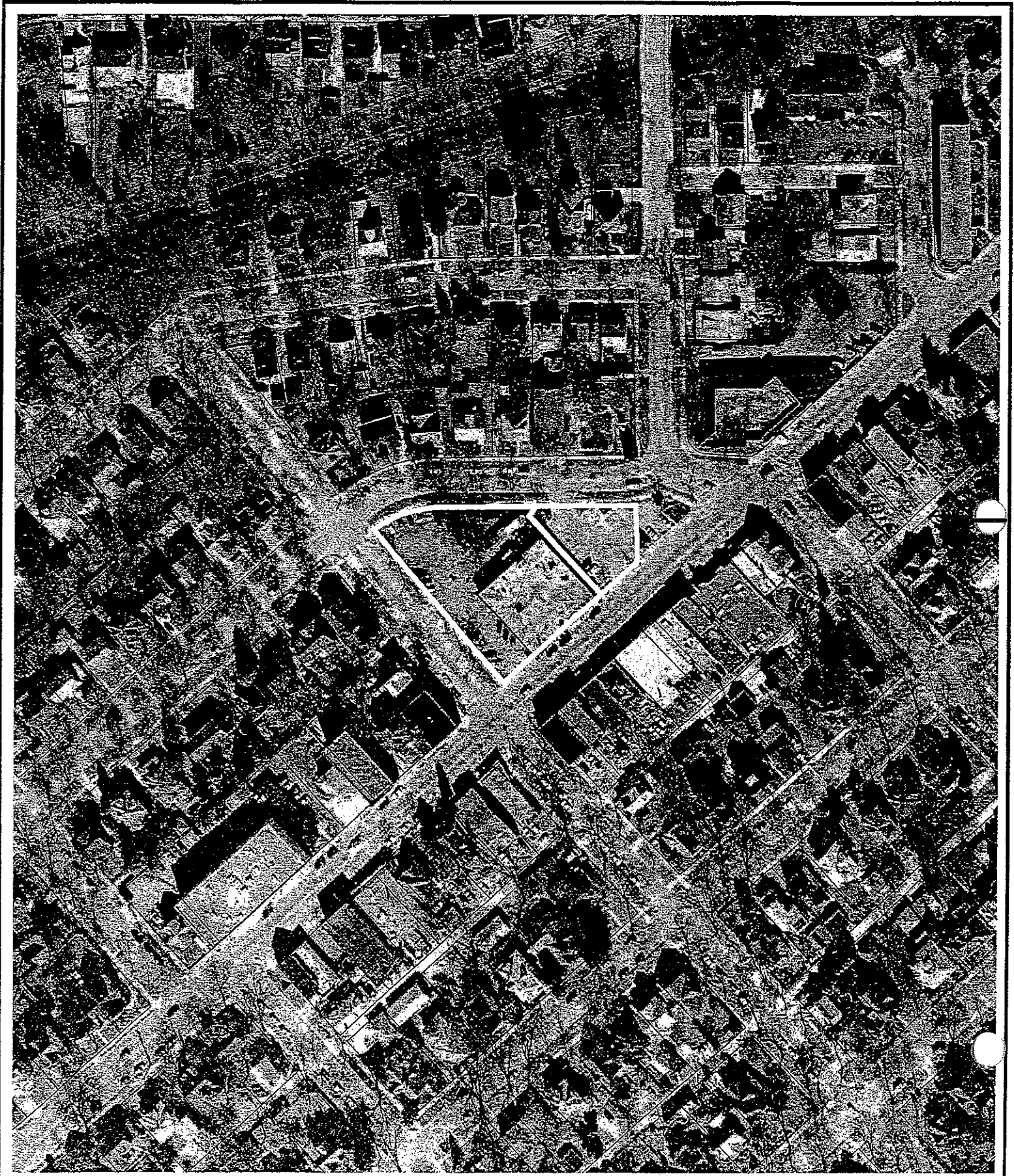


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400 Feet



Date of Aerial Photography - April 2000



CITY OF MADISON

Proposed Rezoning

Location: 1802 - 1864 Monroe Street
Applicant: Thomas Keller - Monroe Neighbors LLC/
City of Madison

From C1 & R2 District(s)

To PUD(GDP-SIP) District(s)

Existing Use: Vacant Commercial Building
& Surface Parking

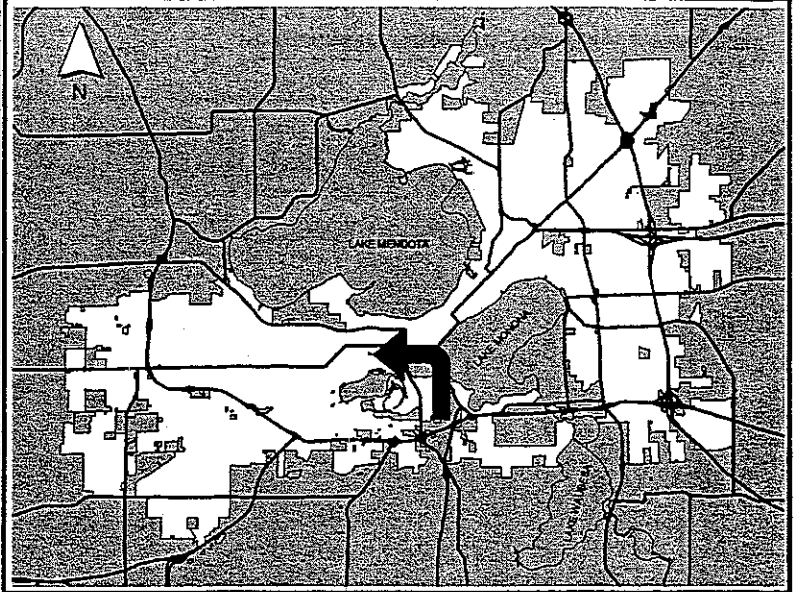
Proposed Use: Demolish Commercial Building & Build
5 Story Mixd Use Building w/12,000 sf
of Commercial Space & 51 Condo Units

File No. _____

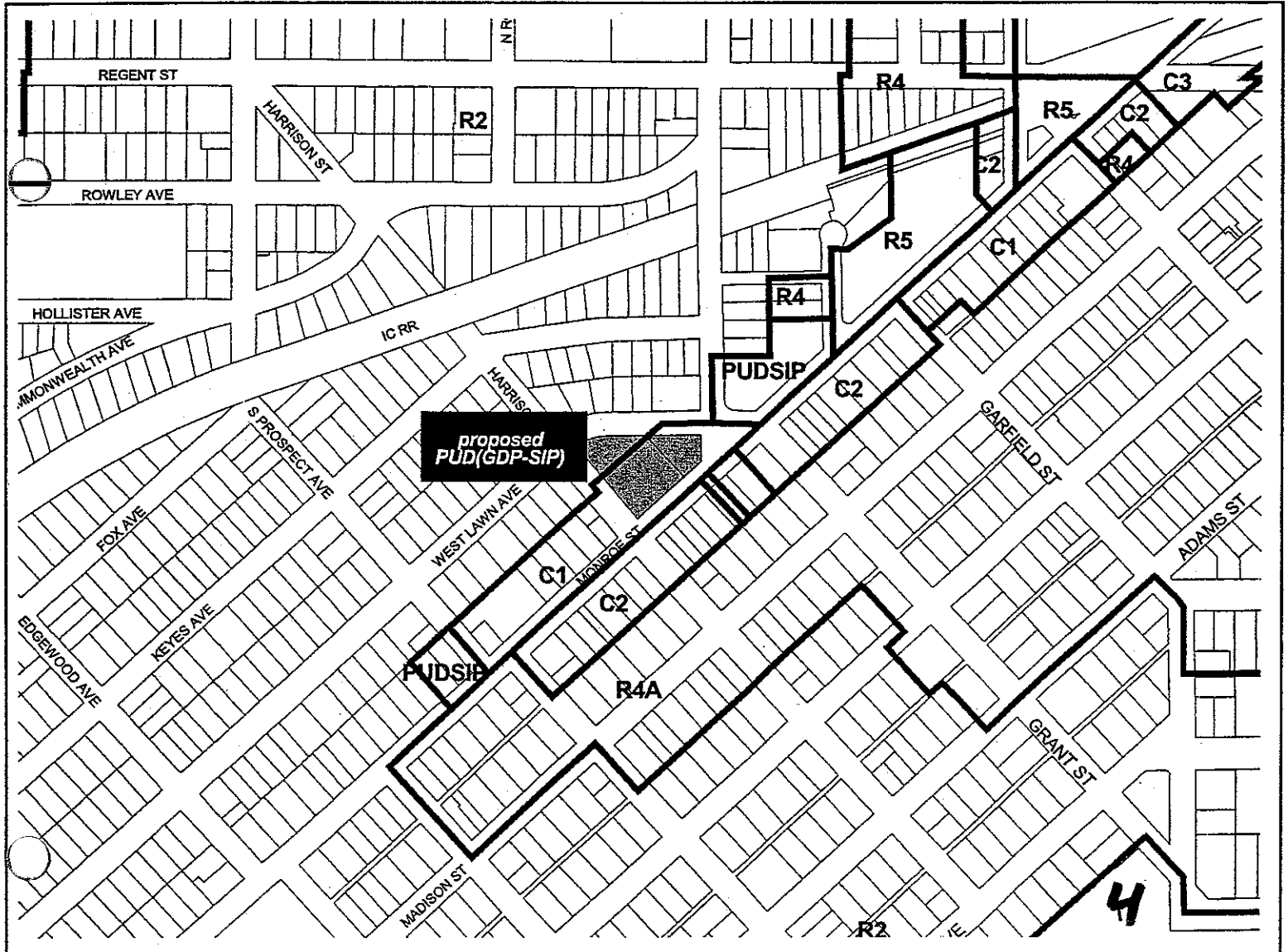
Public Hearing Dates:

Plan Commission 24 January 2005

Common Council 01 February 2005



For Questions contact: Bill Roberts at: 266-5974 or broberts@cityofmadison.com or City Planning at 266-4635



FROM PLAN COMMISSION MINUTES

11. On a motion by Forster Rothbart and seconded by Bowser, the Plan Commission determined that the adopted standards for granting a waiver to the required provision of affordable dwelling units were met, and recommended APPROVAL of Ordinance, I.D. 27291, to rezone 1802-1864 Monroe Street from C1 and R2 to PUD-GDP-SIP and a demolition permit to demolish commercial buildings and build a multi-story mixed-use building with commercial space, residential and parking – District 10, subject to the comments contained in the Plan Commission packet and the following conditions:

- That condition #3 of the Planning Unit report be revised to delete "irrevocable."
- That condition #4 of the Planning Unit report include "full-service" before "grocery."
- That the developer explore trading the three-bedroom affordable unit with another unit in the project prior to consideration in the Common Council to increase unit dispersion.
- That one commercial loading zone and one residential loading zone be provided instead of the two of each now proposed if allowed under the Zoning Ordinance.
- That the applicability of the City Engineering condition regarding approval of the project by the Wisconsin Department of Natural Resources be clarified based on a review of the actual acreage of the site by the applicant and City Engineer's staff. If the site is less than one acre, than the condition does not apply.
- That a "full-service" grocery store be provided in the first floor commercial space, excluding Unit 101.
- If the project is approved by the Common Council with a level of tax increment financing assistance or other changes in the assumptions that change the profitability conclusions in the applicant's inclusionary zoning waiver evaluation and suggests that the new residential project would be more financially feasible according to the waiver criteria, the planned unit development (PUD) will be brought back to the Plan Commission for further review prior to approval of the PUD.

Ald. Konkell, Davis and Forster Rothbart voted no.



PLANNING UNIT REPORT
DEPARTMENT OF PLANNING AND DEVELOPMENT
December 17, 2004

**ZONING MAP AMENDMENT, I.D. 37291 LOCATED AT 1802-1864 MONROE STREET
FROM C1 AND R2 TO PUD-GDP-SIP:**

1. Requested Action: Approval to rezone property from R2 and C1 to PUD-GDP-SIP for a mixed-use, predominantly residential, development to be known as "Monroe Commons". This proposal includes the demolition of a vacant commercial building on the site.
2. Applicable Regulations: Section 28.07 provides the framework and guidelines for Planned Unit Development Districts. Section 28.01 provides the process for zoning map amendments. Section 28.04 outlines the requirements for issuance of demolition permits.
3. Report Drafted By: Bill Roberts, Planner IV.

GENERAL INFORMATION:

1. Applicant: Monroe Neighbors, LLC/Thomas Keller, 448 West Washington Avenue, Madison, WI 53703; and the City of Madison.
2. Status of Applicant: Monroe Neighbors, LLC is the owner of the former "Ken Kopp's" property and the City of Madison owns the existing municipal "Evergreen" public parking lot on this block.
3. Development Schedule: Begin 2005.
4. Parcel Location: Northwest side of Monroe Street at Harrison Street and West Lawn Avenue, Madison Metropolitan School District, 10th Aldermanic District.
5. Parcel Size: 39,995 square feet, or 0.92 acres.
6. Existing Zoning: The portion of the site along Monroe Street is currently zoned C1 and the portion of the site to the rear along West Lawn Avenue is zoned R2.
7. Existing Land Use: Former grocery store and parking lot/City of Madison owned public parking lot.
8. Proposed Use: Demolition of the existing building on the site and construction of a new multi-story mixed-use, predominantly residential-condominium building with first floor commercial space and below grade parking detailed in the attached letter of intent.
9. Surrounding Land Use and Zoning (See map): This site is surrounded by a mix of commercial uses along Monroe Street zoned C1 and C2. Predominantly single-family residential uses along West Lawn Avenue zoned R2.

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10. **Adopted Land Use Plan:** The adopted overall Land Use Plan for the City of Madison shows the front portion of this site along Monroe Street as a Neighborhood Commercial District Mixed-Use District and the rear portion of the site along West Lawn Avenue as RLS Low Density Residential Single-Unit District. At the present time, there is no adopted neighborhood plan that covers this property. However, the City of Madison provided funds to the Dudgeon-Monroe and Vilas Neighborhood Associations and the Monroe Street Merchants to prepare a plan for the Monroe Street commercial district. This plan is in draft form and is entitled: "Monroe Street Commercial District Plan". This site is designated as a redevelopment opportunity in this plan. A copy of this portion of the plan is attached.
11. **Environmental Corridor Status:** This property is not located within a mapped environmental corridor.

PUBLIC UTILITIES AND SERVICES:

The full range of urban services is available to the site.

STANDARDS FOR REVIEW:

This project is subject to the Planned Unit Development District standards and the demolition permit standards.

ANALYSIS AND EVALUATION:

This is an application for approval of a Planned Unit Development-General Development Plan/Specific Implementation Plan to demolish the former "Ken Kopp's" grocery store building and combine that site with the adjacent City of Madison owned Evergreen public parking lot and construct a mixed-use development of primarily residential condominiums with first floor retail space and two levels of below grade parking.

Existing Site Characteristics

This block contains two land uses. The vacant Ken Kopp's grocery store building and the City of Madison public parking Lot. The underlying land in this block slopes down from the southwest to the northeast. The perimeter of the site is established by the Monroe Street, West Lawn Avenue and Harrison Street right-of-way.

The building on the site is in average to below average condition given the building's age and previous use as a grocery store.

Proposed Development

The application is for Plan Commission and Common Council approval of a Planned Unit Development-General Development Plan-Specific Implementation Plan. As noted above, the block is split between two zoning districts. The front portion of the block is zoned C1 Commercial and the rear portion of the block is zoned R2 Residential. It is the applicant's intent to combine the former grocery store site and the existing public parking lot into a unified site to support this development. The developer's purchase of the public parking lot has not yet been approved at this point in time, but is undergoing Commission and Board review.

The application submitted to the City for review in late November 2004 consists of the following elements:

- Demolition of the former "Ken Kopp's" grocery store building.
- Construction of a single five-story building consisting of 51 owner-occupied condominium units, approximately 12,000 square feet of neighborhood commercial retail space, approximately 105 parking spaces on two levels of below grade parking, and approximately 24 covered and open air parking stalls on the site.
- Angled parking for 10 vehicles within the Harrison Street right-of-way.
- Creation of a pedestrian plaza at the Monroe Street/West Lawn Avenue intersection.

There will be 51 dwelling units; seventeen 1-bedroom units, twenty-five 2-bedroom units and nine 3-bedroom units with units ranging in size from 950 square feet to 2,800 square feet.

Project Phasing Timeline

It is the applicant's intent that this building would be built in one phase and construction would begin as soon as all necessary land use approvals have been obtained.

Off-Street Parking and Loading Facilities

This proposal includes the removal of the existing City of Madison public parking lot. The letter of intent states that there will be approximately 24 covered or open air parking stalls and approximately 105 parking stalls on two levels of below grade public and private parking stalls. A semi loading dock is shown off of West Lawn Avenue. Access to the parking and loading areas is shown on the attached plans.

The site plan shows ten parking stalls in the public right-of-way on Harrison Street and 24 covered "patron parking" stalls accessing Harrison Street.

The parking data shown on the plan lists 66 covered parking stalls for the 51 condominium units, or 1.29 stalls per unit. The plans list 63 covered parking stalls for the retail space, or 4.77 per 1,000 square feet of retail space. These 63 spaces include 24 on the ground level accessed off Harrison and 39 below grade.

Demolition of Buildings

The plan includes the demolition of the existing “Ken Kopp’s” building. The building appears to be in average to below average condition for a building of its age. A recycling and reuse plan will be required per the recent change to the City Ordinance.

Consistency With Adopted Plans

The adopted overall general Land Use Plan for the City of Madison shows this site split between neighborhood commercial and single-family residential. There is not a specific adopted neighborhood plan that covers this block although the site is discussed in detail in the draft Monroe Street Commercial District Plan. The use of this block as a mixed-use development of retail space and residential is not consistent with the single-family residential designation.

A portion of the draft “Monroe Street Commercial District Plan” states:

Future development should adhere to the general guidelines noted in section J as well as the following site-specific development guidelines:

- **Build-To-Line:** Building to be built out to the sidewalk along Monroe and Harrison. Slight setbacks are possible for locating sidewalk cafés or pedestrian features.
- **Building Heights:** 3-4 stories, with a potential 5th level possible if a grocery store is provided at the ground floor. The 5th level should be setback from the front façade line. If a grocery store is not provided, the maximum height would be 2-3 stories with the 3rd floor set back. In any condition, building height should step down in the rear in order to make a transition to the scale of the residential neighborhood along West Lawn Avenue.
- **Building Composition, Articulation, and Scale:** The building mass should respect the overall pattern of the street by emphasizing verticality rather than horizontality. A long building should be visually broken up into smaller subunits that replicate the sense of scale along the street. Façades along Monroe should have storefronts with architectural details attractive to pedestrians. A pedestrian-friendly façade with ample windows or openings should also be provided along Harrison. Any enclosed parking structure should be designed to integrate with the architecture and any openings designed to appear as “windows” or part of the building fenestration system. The building elevation along West Lawn Avenue must be designed as a “front” rather than a back, utilizing the same materials as the Monroe Street elevation.
- **Special Architectural Features:** The pointed corner of the site at Monroe and West Lawn is a prominent location which deserves an appropriate architectural response in the form of a tower, projecting bay, special window or other feature.
- **Entrances:** Principal building entrances should be off of Monroe Street. Secondary entrances can occur off Harrison.
- **Service and Parking:** The resolution of parking and service access on this site will be crucial, since the rear of the building faces a residential neighborhood along West Lawn Avenue. Service areas must be not only screened but made to appear as part of

the architecture of the building. Parking and service traffic along West Lawn Avenue should be discouraged as much as possible.

PLANNED UNIT DEVELOPMENT DISTRICT STANDARDS

The Zoning Code Section 28.07(6) includes the following provisions regarding Planned Unit Developments:

1. Statement of Purpose. The Planned Unit Development District is established to provide a voluntary regulatory framework designed to encourage and promote improved environmental and aesthetic design in the City of Madison by allowing for greater freedom, imagination and flexibility in the development of land while insuring substantial compliance to the basic intent of the zoning code and the general plan for community development. To this intent, it allows diversification and variation in the bulk and relationship of uses, structures and spaces in developments conceived as comprehensive and cohesive unified plans and projects. It is further intended to encourage developments consistent with coordinated area site planning.
2. Criteria for Approval. As a basis for determining the acceptability of a Planned Unit Development District application, the following criteria shall be applied with specific consideration as to whether or not it is consistent with the spirit and intent of this ordinance and has the potential for producing significant community benefits in terms of environmental and aesthetic design. For Planned Unit Development Districts with Residential Components in Downtown Design Zones, the Design Criteria adopted by the Common Council shall be used as guidelines for determining whether the following criteria are met.
 - A. Character and Intensity of Land Use. In a Planned Unit Development District, the uses and their intensity, appearance and arrangement shall be of a visual and operational character which:
 - a) Are compatible with the physical nature of the site or area.
 - b) Would produce an attractive environment of sustained aesthetic desirability, economic stability and functional practicality.
 - c) Would not adversely affect the anticipated provision for school or other municipal service unless jointly resolved.
 - d) Would not create a traffic or parking demand incompatible with the existing or proposed facilities to serve it unless jointly resolved. A traffic demand management plan and participation in a transportation management association may provide a basis for addressing traffic and parking demand concerns.

- B. Economic Impact. Planned Unit Development District shall not adversely affect the economic prosperity of the City or the area of the City where the Planned Unit Development is proposed including the cost of providing municipal services.
- C. Preservation and Maintenance of Open Space. In a Planned Unit Development District, adequate provision for the improvement and continuing preservation and maintenance of attractive open space shall be made.
- D. Implementation Schedule. A Planned Unit Development District Shall include suitable assurances that each phase could be completed in a manner which would not result in an adverse effect upon the community as a result of termination at that point.
3. In addition to compatibility to the recommendations of the adopted plan, the standards for review of a Planned Unit Development proposal require considerations of this criteria to ensure that the project is consistent with the spirit and intent of the ordinance and the potential for producing significant community benefits in terms of environmental aesthetic design.

Character and Intensity of Land Use Standard

This proposal is for the siting of a relatively large five-story building in a neighborhood of generally smaller commercial and residential structures. There has been considerable discussion between the developer, the District Alderperson, neighborhood organization representatives, nearby property owners and residents and City staff as this plan has been prepared. The "character and intensity of land use standard" requires that the proposed use and its intensity, appearance and arrangement shall be of a visual and operational character which are compatible with the physical nature of the site or area, would produce an attractive environment of sustained aesthetic desirability, economic stability and functional practicality. This section of the standards also requires that the project would not adversely affect the anticipated provision for school or other municipal services and would not create traffic or parking demand incompatible with the existing or proposed facilities.

There is no question that this building is substantially larger than any other building in the immediate area. A building which was one-story shorter would be more consistent and compatible with the existing development pattern and the physical nature of the site or area. It is staff's opinion, however, that the overall design and appearance of this building is good. The building has been designed to provide the lowest building heights adjacent to West Lawn. The Urban Design Commission has granted final approval of this building (see attached staff reports). It appears that there is general support for the five-story building if it includes a grocery store. Staff do not object to the building height as long as the grocery store is a component of the project. This is also consistent with the recommendations in the draft Monroe Street Commercial District Plan. While it is highly unusual to base a decision regarding the appropriateness of the scale and massing of a building on a specific type of business to be included on one floor of the building, it is clear that a grocery store will be a significant asset to the entire neighborhood and that the trade-off (taller building in exchange for a significant neighborhood supporting business) is worth it. The Plan Commission will need to evaluate the plan and the developer's and neighborhood input to determine if this standard has been addressed.

There is limited open space available to the residents of this building in a second floor open patio area and unit balconies. The establishment of 51 dwelling units on this approximately 40,000 square foot site results in approximately 55 units per acre.

Among the potentially significant challenges of any project of this size in an established neighborhood relates to traffic ingress and egress and parking. The former use of this site as a grocery store and public surface parking lot resulted in significant traffic movement along this portion of Monroe Street. The City Traffic Engineer and City Engineer are evaluating this proposal and have been working with the applicant as planning for this project has proceeded. The Plan Commission will be receiving the Traffic Engineer's recommendations. The Planning Unit is not concerned with the overall traffic impacts and appreciate the efforts of the developer and staff to work together to minimize impacts from the project.

Economic Effect

The Planned Unit Development standards regarding economic effect require that the proposal shall not adversely affect the economic prosperity of the City or the area of the City where the Planned Unit Development is proposed, including the cost of providing municipal services. Planning staff feels that this project can comply with this standard. There has been no evidence submitted to the contrary. Staff expects that the market for condominiums this close to campus will be very attractive to a certain segment of buyers.

As noted above, Planning Unit staff does not anticipate this proposal having an adverse effect on the economic prosperity of the City or the neighborhood or create problems in the cost of providing municipal services to this development. The applicant is requesting TIF assistance in this project. The Plan Commission and Council should note that the financial feasibility of the project is tied to the developers request for TIF assistance.

Inclusionary Dwelling Unit Plan

The ordinance establishing Madison's provisions for inclusionary dwelling units includes a provision that the Plan Commission may waive the requirement to provide inclusionary dwelling units on site if the applicant can establish by clear and convincing financial evidence that providing the required inclusionary dwelling units on site shall render providing the required number of affordable dwelling units financially infeasible. The ordinance provides that if a waiver is granted, the requirement to provide inclusionary dwelling units shall be met by providing some or all of the inclusionary dwelling units off site by assigning the obligation to provide the units to another person, by making payment to the Affordable Housing Trust Fund or any combination of the above. The applicant is pursuing a waiver that is being evaluated by City staff. The request for waiver has been reviewed by Community Development Block Grant staff and their report should be in the packet. **It should be noted, however, that at the time this report was written, the applicant was considering making modifications to the waiver request which may change the request and resulting staff evaluation.**

Because the applicant is applying for this waiver they have not requested any incentives that are earned by providing inclusionary dwelling units. However, the project is receiving density bonuses and presumably will require financial assistance to make the project financially viable. The site is presently zoned C1 Neighborhood Commercial and R2 Single-Family Residential. About 2/3 of the site is zoned C1 and about 1/3 of the site is zoned R2. The inclusionary dwelling unit ordinance allows for density bonuses. The density of dwelling units per acre that are to be used to calculate the bonus density is based upon the existing zoning of the site. The density to be used as a basis for density bonus in the R2 Single-Family Residence District is 7.26 units per acre. The density to be used as a basis for density bonus in the C1 Neighborhood Commercial District is 38 units per acre. For ease of calculation and under the most generous interpretation (as if the entire site was zoned C1) the inclusionary zoning ordinance sets the density base at 38 units per acre. This proposal of 51 units on a 0.92 acre site results in approximately 55 units per acre or 16 units above the base density on this site.

The proposal is also receiving expedited review in the processing of both the Planned Unit Development-General Development Plan and Specific Implementation Plan simultaneously.

Retail Commercial Space

The applicant's letter of intent and zoning text states the project will "create the possibility of a neighborhood grocery opportunity at the site of the former Ken Kopp's". It further states that

"The proposed project will include approximately 12,000 square feet of commercial/retail space. The 12,000 square feet will be continuous and at street level. It will have segregated below grade parking with access from both elevator and stairs. The number of employees is not known at this time. The amount of employees will be subject to the end user."

The Planned Unit Development-General Development Plan-Specific Implementation Plan zoning text provided for review indicates

"Permitted uses to be:

1. Those stated as permitted in the R6 and C1 zoning districts."

There is an extremely high interest in the neighborhood to provide a full service grocery store at this location. However, at the time of writing this staff report, no specific grocery use has been identified.

CONCLUSION:

The Planning Unit's evaluation of this Planned Unit Development-General Development Plan-Specific Implementation Plan concludes that this is a suitable reuse for this property, including the former "Ken Kopp's" site and the City of Madison Evergreen parking lot. The proposed new building will be substantially larger than other buildings along this portion of Monroe Street. As time goes on, the City is seeing more and more taller buildings in the proximity of the UW

Campus and of course, in the downtown neighborhoods. The mass and scale of this building and the potential use as a grocery store have been the focus of discussions between the developer, City staff and the neighborhood for the past several months. Regarding the size and appearance of the building, the Urban Design Commission has given the project positive reviews and has recommended final approval. Staff are willing to support this project with the condition that the grocery store be incorporated into the project.

The use of the first floor retail space as a grocery store is still an unknown factor of this proposal. The challenge is finding an acceptable method to ensure or guarantee that there will be a grocery store at this location without unduly restricting the developer's options in the future if the grocery store does not succeed after several years of operation. Staff is unaware of any PUD-SIP approved in the City of Madison that specifically limits a commercial land use to a single exclusive retail or commercial use.

The project has been reviewed against the draft Monroe Street Commercial District Plan and has been found to comply with the plan's recommendations. Overall, Planning Unit staff feels that the ordinance standards can be adequately addressed for this proposal.

At the time this staff report was written, the level of tax incremental financing assistance for this project was uncertain. An initial review by the City's Board of Estimates seemed to conclude that the level of assistance requested by the developer (\$3.13 million) was not going to be supported. The developer continues to work with staff to identify alternatives to reduce the level of subsidy required to make this project financially feasible. The Plan Commission and Common Council should note that one of the base submittal requirements included in the Zoning Code for Planned Unit Developments includes the submittal of "proof of financing capability". Staff, the Plan Commission and the Common Council have not had significant concerns in approving projects subject to the financing being adequately addressed prior to sign-off on the PUD documents and recording of the documents. The specific condition related to the waiver request and the requested payment into the Inclusionary Zoning Special Revenue Fund will need to be added to any approval. In addition, at the time of this report discussions are continuing regarding methods to reduce the cost of the project, including possible modifications to the design and building materials. Any significant changes to the design of the project will need to be approved by staff through the minor alteration to a Planned Unit Development process, or will need to go back to the Urban Design Commission and/or Plan Commission and Common Council for approval.

RECOMMENDATIONS:

The Planning Unit recommends that the Plan Commission forward this zoning map amendment for a PUD-GDP-SIP to the Common Council with a favorable recommendation subject to the input at the public hearing, the comments from the reviewing departments, and the following:

1. Prior to the final City sign-off on the PUD documents and plans and recording of the PUD and building demolition, the provisions for transfer of ownership of the City owned Evergreen parking lot to the developer shall be finalized, and approved by the Common Council and the Director of Planning and Development.

2. The final sign-off on the PUD and recording of the PUD is conditioned on the approval of a TIF agreement by the Common Council and execution of the agreement and adequate proof of financing as determined by the Director of Planning and Development.
3. A signed ten year or longer irrevocable lease between the owner and a grocery store for all of the commercial space in the project shall be presented and verified by the Director of Planning and Development and the City Attorney prior to sign off and recording of the final PUD and issuance of building permits.
4. A signed lease for ten year or longer with a grocery store for all of the commercial space in the project shall be presented and verified by the Director of Planning and Development and the City Attorney as part of the TIF agreement to be approved by the Common Council.
5. The Plan Commission will need to specifically address the request for a waiver from the Inclusionary Zoning Ordinance.
6. Proof of financing capability shall be provided in a form acceptable to the Director of the Department of Planning and Development.



INCLUSIONARY DWELLING UNIT PLAN APPLICATION

Effective February 16, 2004, any new development plan for which a zoning map amendment is required or preliminary plat that proposes ten (10) or more dwelling units is required under Section 28.04 (25) of the Zoning Ordinance to provide no less than 15 percent of the units in the project as affordable as defined in the above mentioned section.

The following application form provides detailed information and checklists regarding the submittals required to accompany your review, and the development approval process. The application materials are to be attached to any ZONING APPLICATION or SUBDIVISION APPLICATION for any project that is required to comply with the City's Inclusionary Zoning Ordinance.

If you have any questions about the *submittal requirements, application form or development approval process, or when you wish to schedule a required pre-application meeting (see below)*, please contact the Planning Unit at (608) 266-4635.

If you have questions about the *Inclusionary Zoning program itself, including questions about project financing, requests for waivers and post-approval compliance with the inclusionary zoning ordinance*, please contact the Community Development Block Grant (CDBG) Office at (608) 267-0740.

For your convenience, this form may be completed online at www.cityofmadison.com.

Prior to Submittal of an Application

The applicant is required under the Inclusionary Zoning Program Policy and Protocols to meet twice with City staff prior to submitting an application for a project that includes inclusionary dwelling units. The first meeting is scheduled with staff from the Planning Unit, Zoning Administrator and Community Development Block Grant Office (CDBG) to discuss the proposed development and acquaint the applicant with the Inclusionary Zoning process. The second meeting is a discussion of the proposed project plan and draft Inclusionary Dwelling Unit Plan with the Interdepartmental Review Staff Team. Additional inclusionary zoning information, including a schedule of meeting dates and required meeting materials (if any), is available online at www.cityofmadison.com/cdbg/iz.

Contents of the Inclusionary Dwelling Unit Plan (IDUP)

As part of any application for the approval of an Inclusionary Dwelling Unit Plan, the developer will provide the following materials. This list is intended to describe those components essential to an Inclusionary Dwelling Unit Plan, which would be submitted to accompany the Zoning or Subdivision Application. It should also be noted that depending on the type of development approval being requested, the level of detail for each of the items below might vary. For example, when the application submitted involves a preliminary plat or conventional zoning map amendments, the applicant will likely have insufficient information to fully comply with the submittal requirements related to the location, character and size of the proposed dwelling units at the time the project is granted land use approvals. In these cases, the inclusionary zoning requirements will require compliance by recording deed restrictions against the individual lots created through the subdivision (platting) process. The deed restrictions shall require compliance with the inclusionary zoning ordinance prior to the issuance of building permits. This procedure will be applied to any lot created through the subdivision and zoning process for which detailed building and Inclusionary Dwelling Unit Plans are not yet available.

Information required for a complete Inclusionary Dwelling Unit Plan will include the following items:

- This form completed as it pertains to the developer's project, including:
 1. The total number of inclusionary and market-rate dwelling units that will be constructed; and of that total, the number of rental inclusionary dwelling units and the number of owner-occupied inclusionary dwelling units.
 2. The breakdown of unit size by number of bedrooms.
 3. The projected sales and rental prices for the inclusionary dwelling units. (Note: the applicant/developer will need to indicate the target AMI level at the time of application in order to seek a range of appropriate incentives, but the specific sale prices won't be determined until the bedroom size is determined).

CONTINUE →

4. The incentives sought from the City for the construction of the inclusionary dwelling units. Additional information regarding the requested incentives may be provided in the written narrative.
- **A project narrative (if not included as part of a Zoning Application) that includes:**
 5. A statement describing the general character of the intended development.
 6. An identification of the current owner, the proposed developer, and any entity that has an option to purchase or contractual interest in the property that is the subject of the application. The application shall include an identification of all individuals and companies and proportionate share of interests in all corporations including, but not limited to, limited liability corporations, limited liability partnerships, etc. in a form acceptable to the Director of the Department of Planning and Development.
 7. A construction schedule indicating the approximate dates when construction of the project and each of its phases can be expected to begin and be completed, and within each phase the schedule for completion of the inclusionary dwelling units.
 - **Plans, drawn to scale that include:**
 8. A plan of the proposed project showing sufficient detail to make possible the evaluation of the approval criteria.
 9. The arrangement of buildings and their architectural character if not provided elsewhere in the submittal.
 10. The location and distribution of the inclusionary dwelling units throughout the development. The Inclusionary Dwelling Unit Plan shall designate the specific lots that are designated as the inclusionary dwelling unit lots. The developer may work with the Community Development Block Grant Office and Planning Unit to locate the inclusionary zoning lots in subsequent phases.
 - **In addition, the submittal shall include:**
 11. A general outline of the intended organizational structure, agreements, bylaws, provisions, deed restrictions or covenants for any proposed property owners', condominium or homeowners association, or any private provision for common services, areas or other facilities, and the continued protection of the development.

Approval and Recording of the Inclusionary Dwelling Unit Plan

Following pre-application meetings and the submittal of a completed application package, the application will be circulated to several City agencies, including staff from the Community Development Block Grant Office, who will review the Inclusionary Dwelling Unit Plan for compliance with the requirements of the Inclusionary Zoning program. Comments and recommendations on the IDUP will be incorporated into a report that discusses the merits of the overall project containing the inclusionary dwelling units. The report will also include any proposed conditions of approval and will be provided to the applicant one week prior to the scheduled Plan Commission meeting date.

The Plan Commission will review the Inclusionary Dwelling Unit Plan and other related materials at a duly noticed Plan Commission meeting and make its recommendations to the Common Council for approval by ordinance. The approval by the Plan Commission and Common Council will generally include conditions of approval that must be met prior to the final sign-off by City agencies. The conditions of approval attached to the project by the Plan Commission and Common Council shall be provided to the applicant in writing by the Planning Unit. The applicant is required to comply with the conditions of approval prior to requesting final sign-off on the plans by City agencies. Once the revised plans and all conditions of approval have been met, City agencies will sign off on the plans, after which the City's Zoning Administrator will record the approved IDUP at the Dane County Register of Deeds Office with any required deed restrictions, land use restriction agreements, ground leases, subdivision plats, certified survey maps, Planned Development District documents, or other documents required.

Developer Responsibilities

The applicant has certain responsibilities for implementing the provisions of the inclusionary zoning ordinance, including but not limited to construction and standards for inclusionary dwelling units, notification of availability of units to the City, marketing to target income groups, establishment of price points or rent levels and other changes to the Inclusionary Dwelling Unit Plan. These responsibilities shall be acknowledged and outlined in the Inclusionary Dwelling Unit Plan (IDUP) and Subdivision Improvement Contract that will be executed as part of every development that includes applicable dwelling units.

The City will monitor the construction phases of the overall development, including site visits by staff from the Building Inspection Unit and the Public Works Department to verify progress in accordance with the zoning requirements, the Inclusionary Dwelling Unit Plan, and the Subdivision Improvement Contract, where applicable. Phasing of the IDUP will be enforced through a deed restriction that prohibits transfer of ownership of parcels; the restriction will be released as proof of compliance is provided.

CONTINUE →

PART 1 - DEVELOPMENT INFORMATION:

Project or Plat Monroe Commons
 Project Address: 1864 Monroe Street Project Area (In acres): .85 acres
 Developer: Monroe Neighbors, LLC Representative: Craig Hungerford
 Street Address: 448 West Washington Avenue City/State: Madison, WI Zip: 53703
 Telephone: (608) 255-4676 Fax: (608) 255-7384 Email: trio-craig@tds.net
 Agent, If Any: _____ Company: _____
 Street Address: _____ City/State: _____ Zip: _____
 Telephone: () _____ Fax: () _____ Email: _____

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						
Duplexes						
Multi-Family	51				51	.85
TOTAL	51				51	.85

PART 3 - AFFORDABLE HOUSING DATA:

Number of Inclusionary Dwelling Units Proposed by Area Median Income (AMI) Level and Minimum Sale/Rent							
Price	30%	40%	50%	60%	70%	80%	Total
Owner-Occupied Units							
Number at Percent of AMI							
Anticipated Sale Price							
Rental Units							
Number at Percent of AMI							
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 / Effic	1 Bdrm	2 Bdrms	3 Bdrms	4/More Bdrms	Studio Effic	1 Bdrm	2 Bdrms	3 Bdrms	4/More Bdrms
Owner-Occupied Units with:										
Minimum Floor Area:		950	1300	2225						
Rental Units With:										
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 Unit Reserve Fund up to \$10,000 per unit for up to 50% of the affordable units provided.	2
<input type="checkbox"/> Parkland Development Fee Reduction	1	<input type="checkbox"/> Cash subsidy from Inclusionary Unit Reserve Fund of \$5000 for up to 50% of on-site afford-able units 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 comments.

Standards for Inclusionary Dwelling Units (IDUs)	Will Comply	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 →

Standards for Inclusionary Dwelling Units (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: September 2004
- The applicant presented a preliminary development plan for this project to the Interdepartmental Review Staff Team on: September 2004
- The applicant notified Alderperson Ken Golden of District 10 of this development proposal in writing on: June 2004
- The applicant also notified the presidents of the Dudgeon Monroe and Vilas neighborhood in writing on: July 2004
- 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.

4

Applicant Signature Craig Hungerford Date 11/17/04
 Printed Name Craig Hungerford/Jill Hochhausen Phone (608) 255-4676 x10



TRIO

DEVELOPMENT, LLC

November 18, 2004

Attn: Hickory R. Hurie
Department of Planning & Development
215 Martin Luther King, Jr. Boulevard
Madison, WI 53701

Dear Mr. Hurie:

We have estimated that the cost of providing 15% of total project units, or eight IZ units, to comply with the Inclusionary Zoning Requirements will cost approximately \$1,400,000. Please see the analysis below. Therefore, this cost cannot be supported by the development and we are requesting a waiver in the form of a cash payment in lieu of the units.

<u>Unit Type</u>	<u># IZ Units</u>	<u>Sale Price</u>	<u>Affordable Sale Price</u>	<u>Sales Gap</u>	<u>Subsidy</u>
1 Bedroom	4	\$260,000	\$101,900	\$158,100	\$632,400
2 Bedroom	4	\$315,000	\$125,600	\$189,400	\$757,600
Total Subsidy:					\$1,390,000

If you have any questions, please do not hesitate to call.

Sincerely,

MONROE NEIGHBORS, LLC

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CDBG Office
Department of Planning and
Development
City of Madison, Wisconsin

TO: Members of the Plan Commission
FROM: Hickory Hurie
SUBJECT: IZ waiver request for Monroe Commons (Trio Development)
DATE: January 21, 2005

Following the Board of Estimates meeting, on January 18, Don Marx, Brad Murphy, and I met with Craig Hungerford, Jill Hochhausen, Tom Keller, and Bert Slinde to review the project's revisions. The Trio Development Team presented revised budget figures and sales prices, and offered a concept discussed on January 17 with City staff, that of a project with a scaled back design, 3 inclusionary units, payment in lieu for the other 5 IZ units, recognition of the replacement business district parking lot, and a reduced request for TIF assistance.

This analysis for an inclusionary zoning waiver is based upon January 18 information provided by the Trio development group. Its focused upon the residential portion of the project and excludes the non-commercial portion. Further negotiations with the City TIF staff may alter some of the specific financial assumptions for the grocery store and for the business district parking lot components of the project, but the direction of these changes suggests that the residential portion of the project would be even less financially feasible according to the IZ waiver criteria.

Market Rate:

The 53-market-rate unit project, (with any non-TIF 10% assistance applied to the non-residential portions of the project and no TIF 10% set-aside in the project), does appear to meet one of the major benchmark standards adopted by the Plan Commission for the IZ waiver financial infeasibility criteria. The gross profit margin of 14.4% as a market rate project falls within the acceptable range of 12.5% to 17.5% (Attached is the feasibility summary sheet labeled **Market Rate Run**)

Full Inclusionary Zoning:

The project's gross profit margin, with a full complement of the required 8 inclusionary units, (see attachment two labeled **Full IZ**) does not fall within the benchmark standards, but falls to 5.2%.

According to the ordinance and protocol, the project would then be eligible for consideration of a waiver, with an option of off-site units, payment in lieu, a reduction in IZ units, or a combination.

Staff considered the timing of providing off-site new construction replacement IZ units and the opportunities for such a project within the neighborhood, and concluded that it was unlikely that the developer could provide the replacement units within the one-year time frame identified in the ordinance. The projected cost of the inclusionary units, based on the current financial information provided by the developer, appear to exceed the value of the incentives offered as part of the land use process.

Recommended Waiver Option

Based on earlier TIF staff discussion, we recommend an option that involves the provision of 3 inclusionary units on site (2 one-bedroom units and 1 three-bedroom unit) and a payment in lieu of for the other expected IZ units. We did discuss an alternative of 4 one-bedroom IZ units, but this alternative would not substantially alter the costs. Further staff decided to recommend the provision of three since it would offers a more diverse range of housing options and a three-bedroom unit may better address a family need within the neighborhood.

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This option, of 3 IZ units and payment in lieu, does meet the feasibility benchmark for the gross profit margin. Under this scenario (see attachment 3 labeled **Waiver Option**), the gross profit margin returns to 12.8%, just within the lower range of the adopted benchmark criterion of 12.5%.

The amount of the payment in lieu of the five on-site inclusionary units would be calculated according to the formula expressed in the adopted Ordinance at MGO 25 C) 6 g: 10% of the average sale price of the owner-occupied units within the development. Preliminary calculations suggest an average sales price of \$372,074/unit for the 53 units. If this is the final figure after IIF negotiations, the total the developer would provide into the IZ Reserve Fund would be 5 times \$37,207 or \$186,037.

Background information on the Monroe Commons proposal:

The initial market rate scenario falls within the IZ waiver policy parameter assumptions on several significant counts:

- Development fees appear to be fall within the expected range of 8% or less.
- While the Internal Rate of Return is projected to be 7.7%, lower than the adopted benchmark of 15% to 30%, the gross profit assumption is 14.4%, within the adopted benchmark of 12.5% to 17.5%
- the condo fee assumption is \$150/month.
- the market rate scenario assumes that any IIF would be pro-rated to 'gap' costs created by the provision of the grocery store space and business district replacement parking within the development.

The Monroe Commons scenario with the full 8 IZ affordable units

- Assumes no change in the size of the units; hence the smallest IZ one-bedroom unit would be 767 square feet and the largest IZ three-bedroom unit would be 1,532 square feet.
- Assumes no added costs to construction since 8 of the market rate units would be designated IZ units;
- Projects a loss of revenue due to a required reduction in the sales price of the IZ units to an affordable level.
- Assumes no additional IIF to help offset costs associated with the residential portion of the property.
- Projects a decrease in the internal rate of return to 6% and a drop in the gross margin to 5.2%, well outside the adopted range of 12.5% to 17.5%.

The Monroe Commons waiver scenario with three IZ affordable units and payment in lieu of

- Assumes no change in the size of the units; hence the smallest IZ one-bedroom unit would be 767 square feet and the larger IZ three-bedroom unit would be 1,532 square feet.
- Assumes no added costs to construction since 3 of the market rate units would be designated IZ units, but does include an increase in the development budget for a payment in lieu of the IZ units in the range of \$200,000 for the IZ Reserve Fund.
- Provides up to \$150,000 in IIF assistance from the 10% IIF pool for affordable housing, for the three IZ units.
- Demonstrates a return to an internal rate of return of 7.0% (less than the original of 7.7% but higher than the full IZ scenario of 6.0%)
- Projects a gross profit margin of 12.8%, which is within the adopted range of 12.5% to 17.5%.

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Background Note on the Waiver Process for Plan Commissioners:

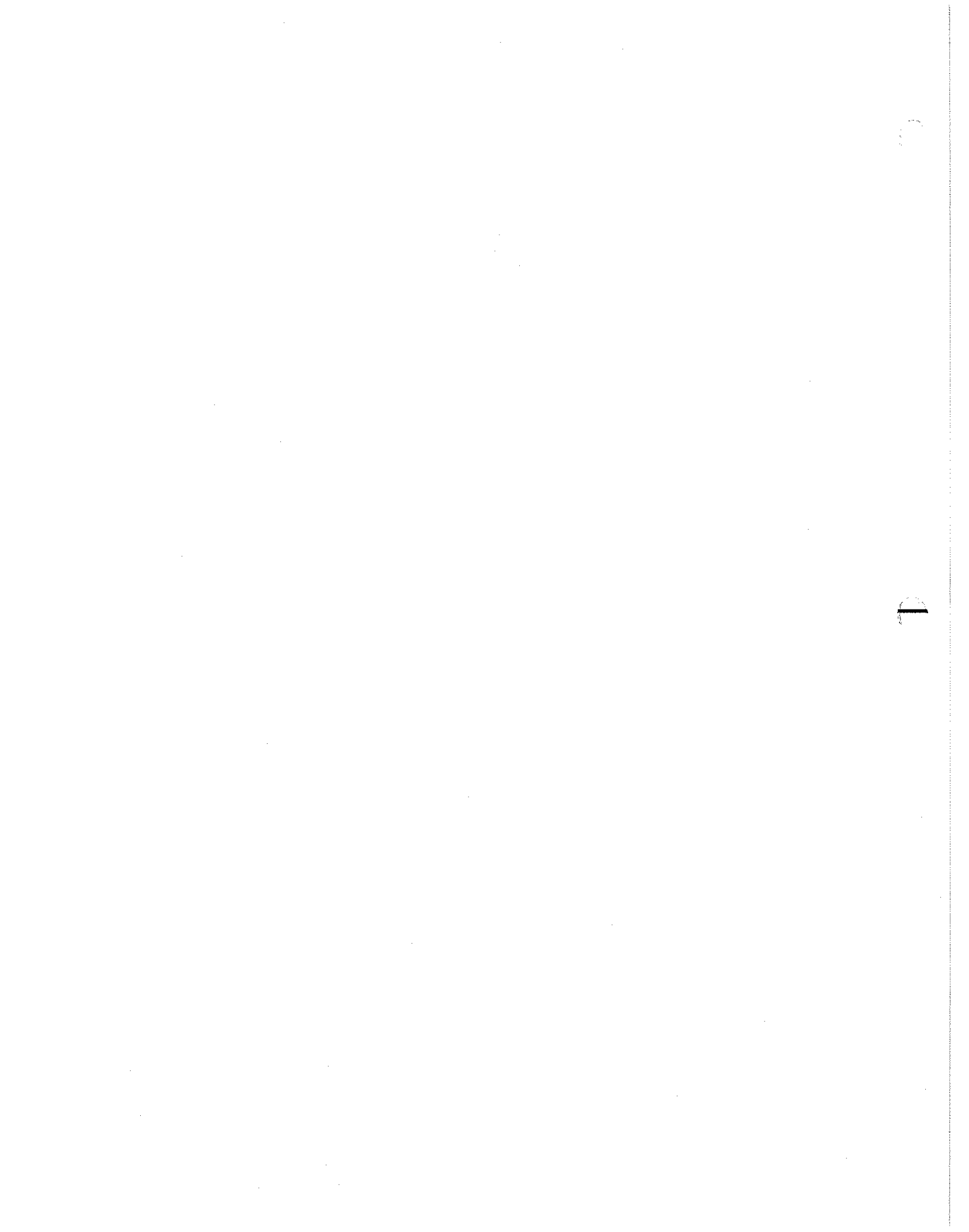
The IZ ordinance and the Policies document outlined the need for an analytical tool to help staff and the Plan Commission to determine a waiver of the on-site IZ unit requirements. The Plan Commission reviewed and adopted the parameters for acceptable waivers; on January 18, 2005, the Common Council approved the parameters.

Suby Van Haden representatives, with the guidance of the staff team and alders, created a model whereby a project's pro-forma could help the Plan Commission determine whether a proposed development would be financially infeasible (or not). A developer would input data on the project without any IZ units, and would then run the model again with a second set of assumptions involving solely the addition of the IZ units. If the project (without the IZ unit) were financially feasible, but the second run of the application with the IZ units (and City incentives) showed that the proposal did not reach a set of benchmark measures (such as gross profit margin), the Commission could reasonably conclude that the project with the IZ units was infeasible, and permit a waiver of some sort, using the choices outlined in the 'Policies' document.

Attachments:

3 scenarios (Monroe market, Monroe Full IZ, Monroe recommended waiver option)

CC: Alder Ken Golden, Dean Brassler, Jeanne Hoffman, Mark Olinger, Joe Gromacki, Don Marx, Brad Murphy



Inflation index factor on costs	5 year average economic change factor for DOR website or 5 year average HUD AMI increase for IZ units	1.5%
Range of market rate initial selling price	MLS or assessors website comps for market rate IZ as indicated in the ordinance (City of Madison annual calculation based on AMI)	See schedule
Sale/transaction costs	6.5% of selling price	\$1,110,000.00
Internal rate of return	15% - 30% (assuming 80% leverage, 20% equity) depending upon product type	7.7%
Ratio of sales to inventory (absorption)	Submit similar comps for similar projects	2.0
Gross profit assumption	12.5 - 17.5 sales minus direct project costs (not costs of sale or transaction costs)	14.4%
Associations	Amount of fees	\$150.00

This scenario allocates \$990,000 to the residential parking, shifts \$500,000 of the initial development fee to the gross profit, but does not include an increase in sales due to inflation.

NOTES ON ANALYSIS:

Per Joe Gromaki, standard TIF policy would suggest City provision of TIF assistance to the project in an amount not to exceed \$3.3 million. Of that amount, \$545,130 to \$1.1 million could be allocated to the 39 parking stalls dedicated to the grocery, and the remainder allocated to a gap caused by special grocery-related construction costs and to the 24 'business district' parking stalls. Hence, none of the projected 'regular' TIF would be allocated to the residential portion of the project.

CONCLUSION:

The ordinance assumes that the initial market rate run of this spreadsheet would show a gross profit within the ranges indicated above. The project as presented as a market rate project, would meet the basic thresholds for gross profit. If the next scenario with a full set of 8 IZ units, does not fall within this range, the project would be eligible for consideration for an IZ waiver of some sort.

Hickory R. Hune, 19/Jan/2005

Trio Development LLC
Monroe Commons market rate 19/Jan/05
For Sale Parameters for Determining Financial Feasibility of Inclusionary Zoning
For the periods from February 01, 2005 through December 31, 2015

Category	Description	Value
Interest rate	Prime plus 0.5	6.0%
Land/Building acquisition - per square foot raw land	\$5 per square foot - raw land	\$19.25
	\$50 - \$55 per square foot, downtown - vacant land	\$19.25
	\$90 - \$125 per square foot, downtown - improved with building	\$19.25
Hard cost contingency	5% new, 8% rehab of AIA contract	0.0%
Soft cost contingency	5% new/rehab of soft costs	11.5%
Contractor profit	6% of AIA contract (net of profit, overhead and general requirements)	0.0%
Contractor overhead	2% of AIA contract (net of profit, overhead and general requirements)	0.0%
Contractor general requirements	4% of AIA contract (net of profit, overhead and general requirements)	0.0%
Parking	\$1,000 per stall - surface	
	\$15,000 per stall - first level underground	
	\$20,000 per stall for second level underground	\$15,000.00
	\$27,000 per stall for three levels or more of underground	
Development fees	8% of total project costs, net of 4 stories and under - \$62.50 per square foot, 5 to 8 stories - \$95, and 8 stories or higher \$110 - \$120	5.1%
Soft cost	10% of cost of construction	\$157.00
Inflation index factor on sales	Adopted policy range needs adjustment to 25 to 35% of construction.	24.4%
	5 year average economic change factor for DOR website or 5 year average HUD AMI increase for IZ units	1.5%

Inflation index factor on costs	5 year average economic change factor for DOR website or 5 year average HUD AMI increase for IZ units	1.5%
Range of market rate initial selling prices	MLS or assessors website comps for market rate IZ as indicated in the ordinance (City of Madison annual calculation based on AMI)	See schedule
Sale transaction costs	6.5% of selling price	\$1,110,000.00
Initial rate structure	15% - 30% (assuming 80% leverage, 20% equity) depending upon product type	Threshold may not be applicable in this case due to mixture of business district parking and grocery use within project.
Ratio of sale-to-inventory absorption	Submit similar comps for similar projects	2.0
Gross Profit Assumption	12.5 - 17.5 sales minus direct project costs (not costs of sale or transaction costs)	5.2%
Association fees	Amount of fees	\$150.00

This scenario allocates \$990,000 to the residential parking, shifts \$500,000 of the initial development fee to the gross profit but does not include an increase in sales due to inflation.

NOTES ON ANALYSIS:

Per Joe Gromaki, standard TIF policy would suggest City provision of TIF assistance to the project in an amount not to exceed that amount, \$545,130 to \$1.1 million could be allocated to the 39 parking stalls dedicated to the grocery, and the remainder allocated to a gap caused by special grocery-related construction costs and to the 24 'business district' parking stalls. Hence, none of the projected 'regular' TIF would be allocated to the residential portion of the project.

CONCLUSION:

The ordinance assumes that the initial market rate run of this spreadsheet would show a gross profit within the ranges indicated. The project, with its 8 IZ units, shows a gross profit margin of 5.2 and hence appears to be financially infeasible as it relates to the IZ ordinance.

See scenario 3 for a combination of 3 IZ units and payment in lieu of the other five IZ units

Hickory R. Hurie, 19/Jan/2005

<p style="text-align: center;">Trio Development LLC Monroe Commons (w/ 8 iz) 19/Jan/05 For Sale Parameters for Determining Financial Infeasibility of Inclusionary Zoning For the periods from February 01, 2005 through December 31, 2015</p>	
Item	Value
Financing	6.0%
Interest rate	Prime plus 0.5
Land/Building acquisition - per square foot raw land	\$5 per square foot - raw land
	\$50 - \$55 per square foot, downtown - vacant land
	\$90 - \$125 per square foot, downtown - improved with building
Hard cost contingency	5% new, 8% rehab of AIA contract
Soft cost contingency	5% new/rehab of soft costs
Contractor profit	6% of AIA contract (net of profit, overhead and general requirements)
Contractor overhead	2% of AIA contract (net of profit, overhead and general requirements)
Contractor general requirements	4% of AIA contract (net of profit, overhead and general requirements)
Parking	\$1,000 per stall - surface \$15,000 per stall - first level underground \$20,000 per stall for second level underground \$27,000 per stall for three levels or more of underground
Development fees	8% of total project costs, net of 4 stories and under - \$62.50 per square foot, 5 to 8 stories - \$95, and 8 stories or higher \$110 - \$120
Soft cost	10% of cost of construction
Inflation index factor on sale	Adopted policy range needs adjustment to 25 to 35% of construction.
	23.2%
	1.5%

Inflation index factor on cost	5 year average economic change factor for DOR website or 5 year average HUD AMI increase for IZ units	1.5%
Number of marketable units for sale	MLS or assessors website comps for market rate IZ as indicated in the ordinance (City of Madison annual calculation based on AMI)	See schedule
Sale transaction costs	6.5% of selling price	\$1,110,000.00
Internal rate of return	15% - 30% (assuming 80% leverage, 20% equity) depending upon product type	7.0%
Ratio of sales to inventory (absorption)	Submit similar comps for similar projects	2.0
Gross Profit Assumption	12.5 - 17.5 sales minus direct project costs (not costs of sale or transaction costs)	12.8%
Association fees	Amount of fees	\$150.00

This scenario allocates \$990,000 to the residential parking, shifts \$500,000 of the initial development fee to the gross profit, but does not include an increase in sales due to inflation.

NOTES ON ANALYSIS:

Per Joe Gromaki, standard TIF policy would suggest City provision of TIF assistance to the project in an amount not to exceed \$3.3 million. Of that amount, \$545,130 to \$1.1 million could be allocated to the 39 parking stalls dedicated to the grocery, and the remainder allocated to a gap caused by special grocery-related construction costs and to the 24 'business district' parking stalls. Hence, none of the projected 'regular' TIF would be allocated to the residential portion of the project.

CONCLUSION:

The ordinance assumes that the initial market rate run of this spreadsheet would show a gross profit within the ranges indicated above. The project, with its 3 IZ units and a payment of 10% of the average price/unit, would meet the gross profit thresholds, and if granted the waiver, would bring it into the financially feasible range as it relates to the IZ ordinance.

Hickory R. Hbrrie, 18/Jan/2005

Trio Development LLC
Monroe Commons (w/ 3 iz) 18/Jan/05
For Sale Parameters for Determining Financial Infeasibility of Inclusionary Zoning
For the periods from February 01, 2005 through December 31, 2015

Financial		Assumptions		Value
Interest rate		Prime plus 0.5		6.0%
Land/Building acquisition - per square foot raw land				
		\$5 per square foot - raw land		\$19.25
		\$50 - \$55 per square foot, downtown - vacant land		\$19.25
		\$90 - \$125 per square foot, downtown - improved with building		\$19.25
Hard cost contingency		5% new, 8% rehab of AIA contract		0.0%
Soft cost contingency		5% new/rehab of soft costs		11.3%
Contractor profit		6% of AIA contract (net of profit, overhead and general requirements)		0.0%
Contractor overhead		2% of AIA contract (net of profit, overhead and general requirements)		0.0%
Contractor general requirements		4% of AIA contract (net of profit, overhead and general requirements)		0.0%
Parking		\$1,000 per stall - surface \$15,000 per stall - first level underground \$20,000 per stall for second level underground \$27,000 per stall for three levels or more of underground		\$15,000.00
Development fees		8% of total project costs, net of 4 stories and under - \$62.50 per square foot, 5 to 8 stories - \$95, and 8 stories or higher \$110 - \$120		5.1%
Soft cost		10% of cost of construction	Adopted policy range needs adjustment to 25 to 35% of construction.	\$157.00
Inflation index factor on sale				
		5 year average economic change factor for DOR website or 5 year average HUD AMI increase for IZ units		24.8%
				1.5%



Madison Metro Transit System



1101 East Washington Avenue
Madison, Wisconsin 53703
Administrative Office: 608 266 4904
Fax: 608 267 8778

January 13, 2005

TO: Plan Commission
FROM: Timothy Sobota, Transit Planner, Metro Transit
SUBJECT: 1864 Monroe Street – Rezoning/Demolition – Monroe Commons

Metro Transit has reviewed the subject development and has the following comments.

MAJOR OR NON-STANDARD REVIEW COMMENTS (Comments which are special to the project and/or may require additional work beyond a standard, more routine project.)

1. The developer shall install and maintain a bench or other seating amenity at the Metro bus stop on the north side of Monroe Street, east of the posted bus stop sign (#2608) that is west of the Spooner Street intersection.
2. The developer shall include this passenger amenity on the final documents filed with their permit application so that Metro Transit may review and approve the design.

GENERAL OR STANDARD REVIEW COMMENTS

In addition, we offer the following General or Standard Review Comments:

3. Metro Transit operates transit service along Monroe Street seven days a week. Metro bus stop #2608 is on the north side of Monroe Street, approximately 80 feet west of Spooner Street.
4. The applicant may select the seating amenity designs given their preference of materials, color, etc. to match building or landscape elements. The applicant may contact Metro Transit to discuss any questions regarding size or exact placement requirements.
5. Metro Transit requests to sign and review final documents submitted for this project.

Please contact Tim Sobota, Metro Transit at 261-4289
or by email at <tsobota@cityodmadison.com>
if you have questions regarding the above items.

Digitally signed
by Tim Sobota
Date:
2005.01.13
11:30:02 -06'00'

CC: Project contact person, Thomas Keller: 608-255-5005 (fax)



City of Madison Fire Department

Fire Prevention Division

325 W Johnson St., Madison, WI 53703-2295
Phone: 608-266-4484 • FAX: 608-267-1153

DATE: January 14, 2005
TO: Plan Commission
FROM: Edwin J. Ruckriegel, Fire Marshal
SUBJECT: **1802-1864 Monroe Street
Demolish Commercial Buildings & Build 5 Story Mixed List Building**

The City of Madison Fire Department (MFD) has reviewed the subject development and has the following comments:

MAJOR OR NON-STANDARD REVIEW COMMENTS (Comments which are special to the project and/or may require additional work beyond a standard, more routine project.)

1. None

GENERAL OR STANDARD REVIEW COMMENTS

In addition, we offer the following General or Standard Review Comments:

2. Provide fire apparatus access as required by Comm 62.0509 and MGO 34.19, as follows:
 - a) The site plans shall clearly identify the location of all fire lanes.
 - b) Provide an aerial apparatus access fire lane that is at least 26-feet wide, with the near edge of the fire lane within 30-feet of the structure, and parallel to one entire side of the structure.
 - c) Provide a completed MFD "Fire Apparatus Access and Fire Hydrant Worksheet" with the site plan submittal.
3. All portions of the exterior walls of newly constructed public buildings and places of employment and open storage of combustible materials shall be within 500-feet of at least TWO fire hydrants. Distances are measured along the path traveled by the fire truck as the hose lays off the truck. See MGO 34.20 for additional information.

Please contact John Lippitt, MFD Fire Protection Engineer, at 608-261-9658 if you have

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questions regarding the above items.

cc: John Lippitt

4



Department of Public Works
Parks Division

Madison Municipal Building, Room 120
215 Martin Luther King, Jr. Boulevard
P.O. Box 2987
Madison, Wisconsin 53701-2987
PH: 608 266 4711
TDD: 608 267 4980
FAX: 608 267 1162

January 12, 2005

TO: Plan Commission
FROM: Simon Widstrand, Parks Development Manager *S.W.*
SUBJECT: 1802-1864 Monroe Street

1. The developer shall pay \$84,461.61 for park dedication and development fees.
2. Park Fees shall be paid prior to SIP signoff, or the developer may pay half the fees and provide a letter of credit for the other half.
3. There are no features of this project that qualify for IZ park fee reduction credits.

Calculation of fees in lieu of dedication plus park development fees:

Park dedication = 51 multifamily @ 700 square feet/unit = 35,700 square feet. The developer shall pay a fee in lieu of dedication based on the land value of the square footage of parkland required (up to a maximum of \$1.65 / square foot). **Estimated fee is \$58,905.00**

Park Development Fees = (51 @ \$501.11) = \$25,556.61

TOTAL PARK FEES = \$84,461.61

Approval of plans for this project does not include any approval to prune, remove or plant trees in the public right-of-way. Permission for such activities must be obtained from the City Forester, 266-4816.

Please contact Simon Widstrand, Madison Parks Division at 266-4714 if you have questions regarding the above items.



Department of Public Works
City Engineering Division

608 266 4751

Larry D. Nelson, P.E.
City Engineer

City-County Building, Room 115
210 Martin Luther King, Jr. Boulevard
Madison, Wisconsin 53703
608 264 9275 FAX
608 267 8677 TDD

Deputy City Engineer
Robert F. Phillips, P.E.

Principal Engineers
Michael R. Dailey, P.E.
Christina M. Bachmann, P.E.
John S. Fahrney, P.E.
David L. Benzschawel, P.E.
Gregory T. Fries, P.E.

Operations Supervisor
Kathleen M. Cryan

Hydrogeologist
Joseph L. DeMorett, P.G.

GIS Manager
David A. Davis, R.L.S.

DATE: January 13, 2005
TO: Plan Commission
FROM: Larry D. Nelson, P.E., City Engineer
SUBJECT: 1802-1864 Monroe Street Planned Unit Development GDP/SIP

The City Engineering Division has reviewed the subject development and has the following comments.

MAJOR OR NON-STANDARD REVIEW COMMENTS (Comments which are special to the project and/or may require additional work beyond a standard, more routine project.)

1. Developer Agreement required for the proposed improvements to the public storm and sanitary sewer systems.
2. The applicant shall dedicate the necessary right of way for public sidewalk if the shift of the public sidewalk is approved. Dedication can be accomplished by recording a certified survey map or by recording a warranty deed administered by City Real Estate Staff. If owner chooses the warranty deed alternative, a registered land surveyor must stamp a map and description of area to be deeded to the City and submit with \$500 fee. All costs responsible by owner/applicant.
3. Sewer fee of \$10,801.80 (payable to MMSD) for the 51 additional treatment plan connections (\$211.80/each).
4. The City shall require a different design for the sanitary sewer service for this development. Contact Mike Dailey (266-4058) of City Engineering to review details.

GENERAL OR STANDARD REVIEW COMMENTS

In addition, we offer the following General or Standard Review Comments:

Engineering Division Review of Planned Community Developments, Planned Unit Developments and Conditional Use Applications.

Name: 1802-1864 Monroe Street Planned Unit Development GDP/SIP

General

- 1.1 The construction of this building will require removal and replacement of sidewalk, curb and gutter and possibly other parts of the City's infrastructure. The applicant shall enter into a City / Developer agreement for the improvements required for this development. The applicant shall be required to provide deposits to cover City labor and materials and surety to cover the cost of construction. The applicant shall meet with the City Engineer to schedule the development of the plans and the agreement. The City Engineer will not sign off on this project without the agreement executed by the developer. The developer shall sign the Developer's Acknowledgement prior to the City Engineer signing off on this project.

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- 1.2 The site plan shall identify lot and block numbers of recorded Certified Survey Map or Plat.
- 1.3 The site plan shall include all lot/ownership lines, existing building locations, proposed building additions, demolitions, parking stalls, driveways, sidewalks (public and/or private), existing and proposed signage, existing and proposed utility locations and landscaping.
- 1.4 The site plan shall identify the difference between existing and proposed impervious areas.
- 1.5 The site plan shall reflect a proper street address of the property as reflected by official City of Madison Assessor's and Engineering Division records.
- 1.6 The site plan shall include a full and complete legal description of the site or property being subjected to this application.

Right of Way / Easements

- 2.1 The Applicant shall Dedicate a _____ foot wide strip of Right of Way along _____
- 2.2 The Applicant shall Dedicate a _____ foot wide strip of Right of Way along _____
- 2.3 The Applicant shall Dedicate a Permanent Limited Easement for grading and sloping _____ feet wide along _____
- 2.4 The City Engineer has reviewed the need for pedestrian and bicycle connections through the development and finds that no connections are required.
- 2.5 The Applicant shall Dedicate a Permanent Limited Easement for a pedestrian / bicycle easement _____ feet wide from _____ to _____
- 2.6 The Developer shall provide a private easement for public pedestrian and bicycle use through the property running from _____ to _____
- 2.7 The developer shall be responsible for the ongoing construction and maintenance of a path within the easement. The maintenance responsibilities shall include, but not be limited to, paving, repaving, repairing, marking and plowing. The developer shall work with the City of Madison Real Estate Staff to administer this easement. Applicable fees shall apply.

Streets and Sidewalks

- 3.1 The Applicant shall execute a waiver of notice and hearing on the assessments for the improvement of [roadway] _____ in accordance with Section 66.0703(7)(b) Wisconsin Statutes and Section 4.09 of the MGO.
- 3.2 **Value of sidewalk installation over \$5000.** The Applicant shall Construct Sidewalk to a plan approved by the City Engineer along _____
- 3.3 **Value of sidewalk installation under \$5000.** The Applicant shall install public sidewalk along _____. The Applicant shall obtain a Street Excavation Permit for the sidewalk work, which is available from the City Engineering Division. The applicant shall pay all fees associated with the permit including inspection fees. All work must be completed within six months or the succeeding June 1, whichever is later.
- 3.4 The Applicant shall execute a waiver of their right to notice and hearings on the assessments for the installation of sidewalk along [roadway] _____ in accordance with Section 66.0703(7)(b) Wisconsin Statutes and Section 4.09 of the MGO.
- 3.5 The Applicant shall grade the property line along _____ to a grade established by the City Engineer. The grading shall be suitable to allow the installation of sidewalk in the future without the need to grade beyond the property line. The Applicant shall obtain a Street Excavation permit prior to the City Engineer signing off on this development.
- 3.6 The Applicant shall close all abandoned driveways by replacing the curb in front of the driveways and restoring the terrace with grass.
- 3.7 **Value of the restoration work less than \$5,000. When computing the value, do not include a cost for driveways. Do not include the restoration required to facilitate a utility lateral installation.** The Applicant's project requires the minor restoration of the street and sidewalk. The Applicant shall obtain a Street Excavation Permit for the street restoration work, which is available from the City Engineering Division. The applicant shall pay all fees associated with the permit including inspection fees.
- 3.8 The Applicant shall make improvements to _____ in order to facilitate ingress and egress to the development. The improvement shall include a (Describe what the work involves or strike this part of the comment.) _____
- 3.9 The Applicant shall make improvements to _____. The improvements shall consist of _____

- 3.10 The approval of this Conditional Use does not include the approval of the changes to roadways, sidewalks or utilities. The applicant shall obtain separate approval by the Board of Public Works and the Common Council for the restoration of the public right of way including any changes requested by developer. The City Engineer shall complete the final plans for the restoration with input from the developer. The curb location, grades, tree locations, tree species, lighting modifications and other items required to facilitate the development or restore the right of way shall be reviewed by the City Engineer, City Traffic Engineer, and City Forester.
- 3.11 The Applicant shall provide the City Engineer with a survey indicating the grade of the existing sidewalk and street. The Applicant shall hire a Professional Engineer to set the grade of the building entrances adjacent to the public right of way. The Applicant shall provide the City Engineer the proposed grade of the building entrances. The City Engineer shall approve the grade of the entrances prior to signing off on this development.
- 3.12 The Applicant shall replace all sidewalk and curb and gutter which abuts the property which is damaged by the construction or any sidewalk and curb and gutter which the City Engineer determines needs to be replaced because it is not at a desirable grade regardless of whether the condition existed prior to beginning construction.
- 3.13 The Applicant shall obtain a privilege in streets agreement for any encroachments inside the public right of way. The approval of this development does not constitute or guarantee approval of the encroachments.
- 3.14 The Applicant shall provide the City Engineer with the proposed soil retention system to accommodate the restoration. The soil retention system must be stamped by a Professional Engineer. The City Engineer may reject or require modifications to the retention system.
- 3.15 The Applicant shall complete work on exposed aggregate sidewalk in accordance with specifications provided by the city. The stone used for the exposed aggregate shall be approved by the City. The Construction Engineer shall be notified prior to beginning construction. Any work that does not match the adjacent work or which the City Construction Engineer finds is unacceptable shall be removed and replaced.
- 3.16 All work in the public right-of-way shall be performed by a City licensed contractor

Storm Water Management

- 4.1 The site plans shall be revised to show the location of all rain gutter down spout discharges.
- 4.2 Storm sewer to serve this development has been designed and constructed. The site plans shall be revised to identify the location of this storm sewer and to show connection of an internal drainage system to the existing public storm sewer.
- 4.3 The plan set shall be revised to show a proposed private internal drainage system on the site. This information shall include the depths and locations of structures and the type of pipe to be used.
- 4.5 The applicant shall show storm water "overflow" paths that will safely route runoff when the storm sewer is at capacity
- 4.6 The applicant shall demonstrate compliance with Section 37.07 and 37.08 of the Madison General Ordinances regarding permissible soil loss rates. The erosion control plan shall include Universal Soil Loss Equation (USLE) computations for the construction period. Measures shall be implemented in order to maintain a soil loss rate below 7.5-tons per acre per year.
- 4.7 This site is greater than one (1) acre and the applicant is required by State Statute to obtain a Notice of Intent Permit (NOI) from the Wisconsin Department of Natural Resources. Contact Jim Bertolacini of the WDNR at 275-3201 to discuss this requirement.
- 4.8 This development includes multiple building permits within a single lot. The City Engineer and/or the Director of the Inspection Unit may require individual control plans and measures for each building.
- 4.9 If the lots within this site plan are inter-dependent upon one another for stormwater runoff conveyance, and/or a private drainage system exists for the entire site an agreement shall be provided for the rights and responsibilities of all lot owners. Said agreement shall be reviewed and placed on file by the City Engineer, referenced on the site plan and recorded at the Dane Co Register of Deeds.
- 4.10 Prior to approval, this project shall comply with Chapter 37 of the Madison General Ordinances regarding stormwater management. Please contact Greg Fries at 267-1199 to discuss this requirement
- 4.11 The plan set shall be revised to show more information on proposed drainage for the site. This shall be accomplished by using spot elevations and drainage arrows or through the use of proposed contours. It is necessary to show the location of drainage leaving the site to the public right-of-way. It may be necessary to provide information off the site to fully meet this requirement.
- 4.12 A portion of this project comes under the jurisdiction of the US Army Corp of Engineers and WDNR for wetland or flood plain issues. A permit for those matters shall be required prior to construction on any of the lots currently within the jurisdictional flood plain.
- 4.13 The Applicant shall submit, prior to plan sign-off, digital CAD files to the Engineering Program Specialist in the Engineering Division (Lori Zenchenko). The digital copies shall be to scale and represent final construction.

CAD submittals can be either AutoCAD (dwg), MicroStation (dgn) or Universal (dxf) formats and contain the following data, each on a separate layer name/level number:

- a) Building Footprints

- b) Internal Walkway Areas
- c) Internal Site Parking Areas
- d) Other Miscellaneous Impervious Areas (i.e. gravel, crushed stone bituminous/asphalt, concrete etc.)

NOTE: Email file transmissions preferred izenchenko@cityofmadison.com. Include the site address in this transmittal.

- 4.14 NR-151 of the Wisconsin Administrative Code will be effective on October 1, 2004. Future phases of this project shall comply with NR 151 in effect when work commences. Specifically, any phases not covered by a Notice of Intent (NOI) received from the WDNR under NR-216 prior to October 1, 2004 shall be responsible for compliance with all requirements of NR-151 Subchapter III. As most of the requirements of NR-151 are currently implemented in Chapter 37 of the Madison General Ordinances, the most significant additional requirement shall be that of infiltration.

NR-151 requires infiltration in accord with the following criteria. For the type of development, the site shall comply with one of the three (3) options provided below:

Residential developments shall infiltrate 90% of the predevelopment infiltration amount, 25% of the runoff from the 2-year post development storm or dedicated a maximum of 1% of the site area to active infiltration practices

Commercial development shall infiltrate 60% of the predevelopment infiltration amount, 10% of the runoff from the 2-year post development storm or dedicate a maximum of 2% of the site area to active infiltration practices.

Utilities General

- 5.1 The Applicant shall obtain a Street Excavation permit for the installation of utilities required to serve this project. The Applicant shall pay the permit fee, inspection fee and street degradation fee as applicable and shall comply with all the conditions of the permit.
- 5.2 The applicant shall obtain all necessary sewer connection permits and sewer plugging permits prior to any utility work.
- 5.3 All proposed and existing utilities including gas, electric, phone, steam, chilled water, etc shall be shown on the plan.
- 5.4 The applicant's utility contractor shall obtain a connection permit and excavation permit prior to commencing the storm sewer construction.
- 5.5 The site plans shall be revised to show the location of existing utilities including depth, type, and size in the adjacent right-of-way.
- 5.6 The developer shall provide information on how the Department of Commerce's requirements regarding treatment of storm water runoff, from parking structures, shall satisfied prior to discharge to the public sewer system. Additionally, information shall be provided on which system (storm or sanitary) the pipe shall be connected to.

Sanitary Sewer

- 6.1 Prior to approval of the conditional use application, the owner shall obtain a permit to plug each existing sanitary sewer lateral that serves a building that is proposed for demolition. For each lateral to be plugged the owner shall deposit \$1,000 with the City Engineer in two separate checks in the following amounts: (1). \$100 non-refundable deposit for the cost of inspection of the plugging by City staff; and (2) \$900 for the cost of City crews to perform the plugging. If the owner elects to complete the plugging of a lateral by private contractor and the plugging is inspected and approved by the City Engineer, the \$900 fee shall be refunded to the owner.
- 6.2 All outstanding Madison Metropolitan Sewerage District (MMSD) and City of Madison sanitary sewer connection charges are due and payable prior to connection to the public sewerage system.
- 6.3 Each unit of a duplex building shall be served by a separate and independent sanitary sewer lateral.
- 6.4 The site plan shall be revised to show all existing public sanitary sewer facilities in the project area as well as the size and alignment of the proposed service.

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Traffic Engineering Division

David C. Dryer, City Traffic Engineer

Madison Municipal Building
215 Martin Luther King, Jr. Boulevard
P.O. Box 2986
Madison, Wisconsin 53701-2986
PH 608/266-4761
TTY 608/267-9623
FAX 608/267-1158

January 14, 2005

TO: Plan Commission

FROM: David C. Dryer, P.E., City Traffic Engineer

SUBJECT: **1802 to 1864 Monroe Street – Rezoning – C1 & R2 to PUD (GDP-SIP) – Five (5) Story Mixed Use Building w/12000 Sq. Ft. Commercial Space & 51 Condo Units**

The City Traffic Engineering Division has reviewed the subject development and has the following comments.

MAJOR OR NON-STANDARD REVIEW COMMENTS (Comments which are special to the project and/or may require additional work beyond a standard, more routine project.)

1. City of Madison radio systems are microwave directional line of sight to remote towers citywide. The building elevation has been review by Traffic Engineer Shop, finding the location of the building not in the direct path of the microwave signal.
2. The developer shall enter into a subdivision contract and make improvements to the public streets as proposed prior to submittal of final site plans.
3. The applicant shall not improve the right of way as proposed unless encroachment is approved by City of Madison Real Estate Division prior to plans being submitted for approval. Contact City Real Estate if you have questions.
4. The approval of this conditional use or PUD (GDP-SIP) does not include the approval of the changes to roadways, sidewalks or utilities. The applicant shall obtain separate approval by the Board of Public Works and Common Council for the restoration of the public right-of-way including any changes requested by the developer.
5. The applicant shall modify site to accommodate pedestrian island on Monroe St. at Harrison St.
6. A condition of approval shall be that no residential parking permits will be issued for 1802 & 1864 Monroe Street, this would be consistent with projects. In addition, the applicant shall inform all owners and/or tenants of this facility of the requirement in their condominium documentation, apartment leases and zoning text; however, the designated inclusionary dwelling units at 1802 & 1864 Monroe Street, shall be eligible for residential parking permits according to the inclusionary zoning. The applicant shall

provide addresses and apartment numbers for designated inclusionary dwelling units, eligible for residential parking permits to City Traffic Engineer/Parking Manager.

7. The applicant shall contact City of Madison Real Estate Division prior to plans being submitted for approval of transfer property.
8. A traffic impact study was requested on behalf of the neighborhood by the Alderperson. The study is technically accurate and complete, and barring issues raised that staff is unaware of, staff consider the traffic impact study complete. From our point of view, the applicant has made some desirable improvements.
9. Consistent with the applicant's traffic impact study, approval of the conditional use is subject to the applicant entering into a subdivision contract with the City and constructing the traffic island treatments on Monroe Street and any modifications required therein.
10. Consistent with discussions with the applicant's traffic consultant, the applicant shall work with the City of Madison Traffic Engineering Division to monitor the increased traffic from the proposed development, and if necessary prepare a plan or plans to mitigate traffic generated by the development into the surrounding neighborhoods, specifically West Lawn & Harrison St. If traffic plans to prevent increased traffic generated by the development are not successful, the City, the applicant and the neighborhood may jointly develop a plan for mitigating traffic which may include recommending physical modifications and neighborhood traffic management devices within the public rights-of-way. The applicant agrees that the costs of such required modifications shall be paid by the applicant, with the cost of any construction not to exceed \$7,500. Any traffic calming or diversion decisions will follow City of Madison Neighborhood Traffic Management Plan.
11. The zoning text shall be modified to demonstrate use of stalls in the Evergreen lot will be available for public use.
12. The developer shall deposit \$20,000 to address neighborhood traffic calming. The money will be used with the City's NTMP program.
13. The developer shall enter in a subdivision contract to construct the traffic island on Monroe Street at Harrison.
14. The developer shall be responsible for any modifications or construction in the city's public right-of-way.

GENERAL OR STANDARD REVIEW COMMENTS

In addition, we offer the following General or Standard Review Comments:

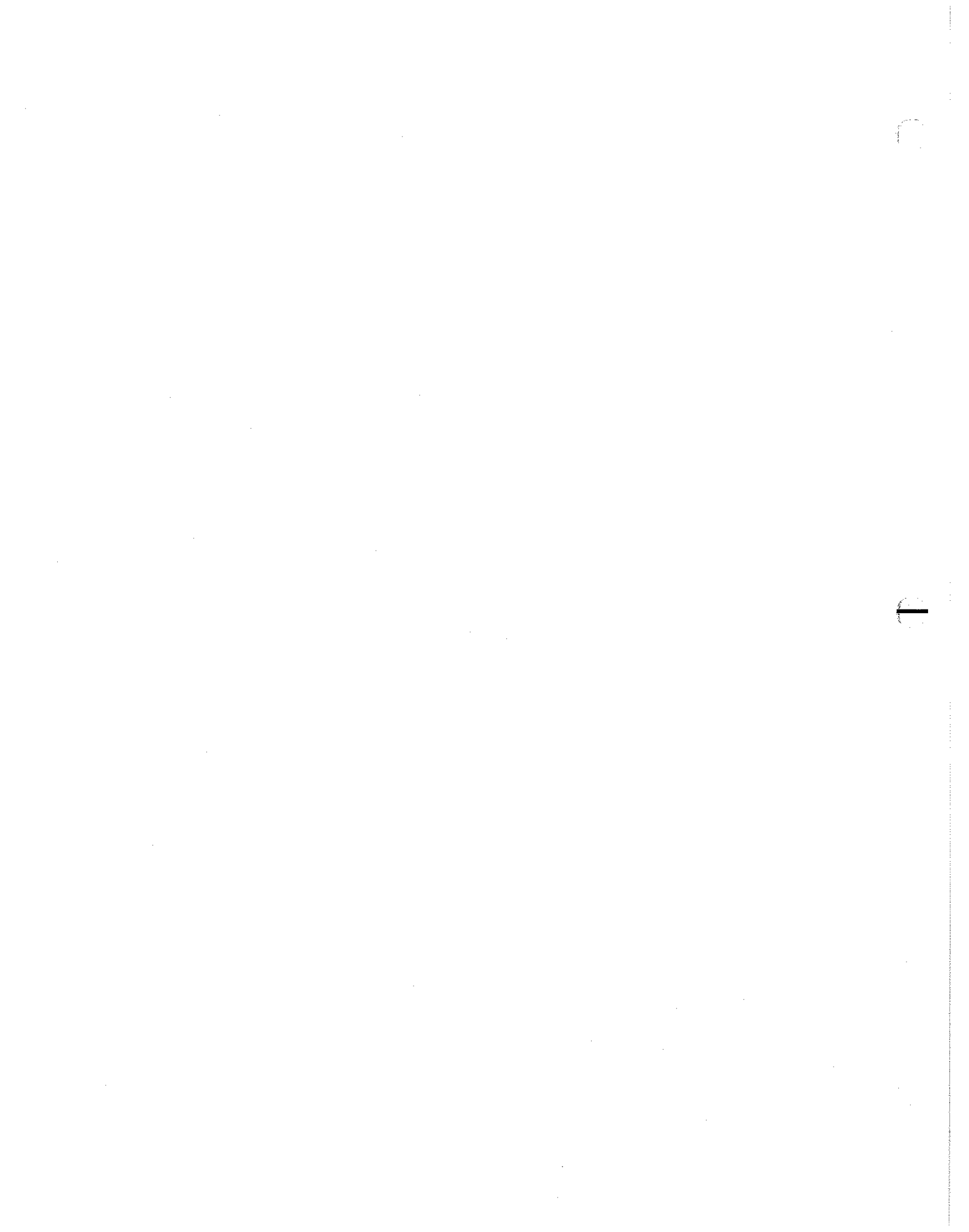
15. When the applicant submits final plans for approval, the applicant shall show the following: items in the terrace as existing (e.g., signs and street light poles), type of surfaces, existing property lines, addresses, one contiguous plan (showing all easements, all pavement markings, building placement, and stalls), adjacent driveway

approaches to lots on either side and across the street, signage, percent of slope, vehicle routes, dimensions of radii, aisles, driveways, stalls including the two (2) feet overhang, and a scaled drawing at 1" = 20'.

- 16 The applicant shall note that Madison General Ordinance 10.08(a) 6 requires all facilities to have adequate internal circulation in which no backing movement, except that required to leave a parking stall, is allowed. All parking facilities shall be designed so as not to utilize any portion of the public right-of-way except to permit ingress and egress in a forward manner: unless permitted by the Board of Public Works after the Board receives the recommendation of the City Traffic Engineer. This condition shall be approved prior to plans being submitted for approval, contact City Traffic Engineering for detail. Traffic Engineering staff will require a formal letter requesting the right to back off the street, (type of vehicles, reasons, hours of operation of the truck, etc.) and the applicant shall provide a 1"=20' scale drawing and a drawing on a 8" by 11" sheet showing parking, parking stalls, pavement markings, type of truck turning and both sides of the street. If recommended by the City Traffic Engineer, staff will facilitate the approval to the Board of Public Works.
17. "Stop" signs and mirrors shall be installed at the driveway approaches behind the property line. All signs at the approaches shall be installed behind the property line. All directional/regulatory signage and pavement markings on the site shall be shown and noted on the plan.
18. The applicant shall submit with the parking lot plans a letter of operation of the garage doors to the ramps; a detail drawing of the area showing queuing of at least one vehicles 20 ft. or two vehicles of 38 ft. if garage doors are closed at approaches that will not be blocking the public sidewalk.
19. The applicant shall show the dimensions for proposed parking stalls' items A, B, C, D, E, and F, and for ninety-degree angle parking wide stalls and backing up, according to Figures II "Medium and Large Vehicles" parking design standards in Section 10.08(6)(b) 2. (If two (2) feet of overhang are used for a vehicle, it shall be shown on the plan.)
20. The applicant shall design the underground parking areas for stalls and backing up according to Figures II of the ordinance using the 9' or wider stall for the commercial/retail area. The "One Size Fits All" stall shall be used for the residential parking area only, which is a stall 8'-9" in width by 17'-0" in length with a 23'-0" backup. Aisles, ramps, *columns*, offices or work areas are to be excluded from these rectangular areas, when designing underground parking areas.
21. The Developer shall post a deposit and reimburse the City for all costs associated with any modifications to Street Lighting, Traffic Signals, Signing and Pavement Marking including labor and materials for both temporary and permanent installations.
22. Public signing and marking related to the development may be required by the City Traffic Engineer for which the developer shall be financially responsible.

Please contact John Leach, City Traffic Engineering at 267-8755 if you have questions regarding the above items:

Contact Person: Thomas Keller



City of Madison, Wisconsin

REPORT OF: URBAN DESIGN COMMISSION
TITLE: 1864 Monroe Street -- PUD(GDP-SIP)

PRESENTED: October 20, 2004

REFERRED:

REREFERRED:

REPORTED BACK:

AUTHOR: Alan J. Martin, Secretary

ADOPTED:

POF:

DATED: October 20, 2004

ID NUMBER:

Members present were: Paul Wagner, Chair, Michael Barrett, Todd Barnett, Ald. Steve Holtzman, Lou Host-Jablonski, Robert March, Lisa Geer and Bruce Woods.

SUMMARY:

At its meeting of October 20, 2004, the Urban Design Commission **RECEIVED AN INFORMATIONAL PRESENTATION** on a PUD(GDP-SIP) for the redevelopment of 1864 Monroe Street including the entire block for a 5-6 story building with level parking, a first floor grocery store and 51 condominium units. Appearing on behalf of the project was William W. Rusk and Jeffery J. Bogart of Eppstein Uhen Architects Inc., and David Keller. Presented were details on the proposed mixed-use development consisting of street side elevations of the proposed structure, in combination with site plan and interior floor plan details. Following the presentation, it was clarified during discussion on the project that there would be approximately 2 ½ levels of lower level parking. It was also noted that, as a result of a series of neighborhood meetings, the project has been well received. Following the presentation, the Commission noted the following:

- The incorporation of rooftop gardens was praised, with encouragement to provide for less impervious area within the proposed public plaza.
- Provide more articulation and detail of the public plaza area.
- Concerns were raised on the proposed backing-up of vehicles from a loading area onto the West Lawn Avenue right-of-way. It was noted by several members that Traffic Engineering's ordinances and policies did not allow for this. The applicant was requested to provide verification on this issue.
- The building does not blend in and is too tall as noted by some of the neighbors.

ACTION:

Since this was an informational presentation, no formal action was taken by the Urban Design Commission.

After the Commission acts on an application, individual Commissioners rate the overall design on a scale of 1 to 10, including any changes required by the Commission. The ratings are for information only. They are not used to decide whether the project should be approved. The scale is 1 = complete failure; 2 = critically bad; 3 = very poor; 4 = poor; 5 = fair; 6 = good; 7 = very good; 8 = excellent; 9 = superior; and 10 = outstanding. The overall ratings for this project are 7, 7, 8, 9, 9 and 10.

URBAN DESIGN COMMISSION PROJECT RATING FOR: 1864 Monroe Street

	Site Plan	Architecture	Landscape Plan	Site Amenities, Lighting, Etc.	Signs	Circulation (Pedestrian, Vehicular)	Urban Context	Overall Rating
M e m b e r R a t i n g s	10	10	-	-	-	-	10	10
	9	8	-	-	-	8	8	8
	8	8	6	7	-	7	7	7
	7	7	-	-	-	7	8	7
	9	9	-	-	-	9	9	9
	9	9	-	-	-	9	9	9
	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-

General Comments:

- Brilliant solution to challenging triangular site; exceptionally sensitive to sensibilities of neighbors.
- Great project. It will look large in the neighborhood since it stands alone on the block and is 4 stories taller than any adjacent building.
- Usable roof garden resident space is a plus. Appreciate the amount of windows and detail in façade. Good intensive use of an urban site. Public plaza node could be an exciting space – some impervious paving there.
- I understood backing in from street not permitted by code (under no conditions); introduce benches with arcade; architecture seems too formal, not “relaxed” with Monroe Street feel.
- Stellar urban ideas! How will you activate the public space?
- Nice solution for parking – delivery – open space.
- Simply excellent. Brilliant resolution of complex site issues, reflected in the superior architecture. It gets a “9” only because this is an informational presentation.

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AGENDA # VLB

City of Madison, Wisconsin

REPORT OF: URBAN DESIGN COMMISSION

PRESENTED: December 15, 2004

TITLE: 1864 Monroe Street – PUD(GDP-SIP),
Monroe Commons Mixed-Use
Development

REFERRED:

REREFERRED:

REPORTED BACK:

AUTHOR: Alan J. Martin, Secretary

ADOPTED:

POF:

DATED: December 15, 2004

ID NUMBER:

Members present were: Paul Wagner, Chair; Michael Barrett, Bruce Woods, Lou Host-Jablonski, Ald Steve Holtzman, Robert March, Lisa Geer and Todd Barnett.

SUMMARY:

At its meeting of December 15, 2004, the Urban Design Commission **GRANTED INITIAL APPROVAL** of a PUD(GDP-SIP) for the redevelopment of 1864 Monroe Street, including the entire block with a 5-6 story building with lower level parking, first floor retail and fifty-one condominium units. Appearing on behalf and in support of the project was William Rusk and Jeffery J Bogart of Epstein Uhen Architects, Christopher Thiel of Schreiber Anderson, in addition to David and Thomas Keller. Registered and appearing in opposition were Ann Clark, Audrey Highton and Char Thompson. Distributed to the Commission were letters of support from the Monroe Street Merchant's Association (petition), Julia Kerr, President of the Vilas Neighborhood Association, and Ald. Ken Golden, District 10. The modified plans as presented detailed the following:

- Changes to the site plan in regards to fire lanes and vision triangles reflect that only one existing tree can be maintained with no new trees on Harrison Street in order to satisfy fire access requirements.
- In regards to backing up from a loading area onto West Lawn Avenue, the applicants presented a letter on a previously approved project with a similar issue. The letter describes a process for approval by the Board of Public Works, requiring a recommendation by way of letter from the Traffic Engineer.
- Sun angle studies were presented in combination with details on the relative height of adjoining buildings across each adjoining street's block face which provided a comparison of the corresponding height of the "building facades/elevations" as proposed in contrast with the building height of existing adjoining structures within the area. An emphasis was placed on the "two-story" design elements of the proposed building as it faces each adjoining block face, especially the two-story step down of the building as it faces West Lawn Avenue.

Following the presentation the Commission expressed concerns on the following:

- The mass and density of the project appeared to be based on the large sum paid for acquisition of the property.
- The utilization of utility brick is out of scale with the brick of older existing buildings on adjoining properties. The use of standard modular brick instead of utility brick is a better fit with adjacent older brick buildings in the area and will help tie in to the fabric of the older neighborhood as well as add to the feel of a traditional neighborhood.

- Ald. Holtzman reminded the Commission to examine the project (as requested within the memo from Ald. Golden) “on the degree of success architects have achieved in mitigating the bulk of the building in relationship to surrounding uses” and to provide “suggestions on design features or any relevant matter.” The responses from the Commissioners were as follows:
 - a) It was noted that the architects utilized every trick in the book to mitigate building height, bulk and mass as it relates to existing structures within the area.
 - b) The residential unit that fronts the public plaza area at West Lawn Avenue and Monroe Streets still needs to be rethought. The space should be activated by its relationship to the public plaza. The economic model dictating its residential use is missing the creation of an enlivened space, a step-connection to the public plaza with uses that enhance and relate to the function of the adjacent plaza area. A visual connection is necessary but could be further enhanced with a physical connection.
- As a follow-up to considerations within Ald. Golden’s memo:
 - a) The scale of the brick: standard modular instead of utility was important.
 - b) The scale and use of the corner as it relates to the future public plaza is still an issue and missing a critical link in how the building meets the street at all corners.
 - c) The design of the building as it faces each of the block faces appears to meet the street at all corners, stepping down or providing a defining of the cornice line above the 2nd floor level, comparable to structures in adjoining block faces, except in the case of the relationship between and elevation with the proposed pedestrian plaza at West Lawn Avenue and Monroe Street.
 - d) The building as designed meets the street like existing buildings within the area. The design focuses attention to the street level.
- The amount of landscaping shown within the plan appears fine but a detailed landscape plan shall be provided including a landscape worksheet.
- The drawings and elevations show a lot of shadowline. The proposed use of large-scale block and brick don’t act to create and provide the level of detailing accomplished with standard sized brick.
- Agree with the concerns of the Dungeon-Monroe Neighborhood Association that the building is too tall and will not be a building that will look like a contemporary structure.
- In regards to massing, the uniqueness of the site, on an island by itself, will be a landmark that will stand above everything else in scale; it needs to be right to work.
- The proximity of the University, with its large buildings is a factor in considering approval of the project. The quality of the design drives the project.
- Value of project is to support existing retail.
- Investigate that the grocery store issue be treated with a deed restriction or condominium restriction before allowing construction.
- Examine ways, such as the reduction in floor-to-floor heights (14’ high for the first floor level retail, with 11’ ceiling heights for the upper residential stories) to make the building shorter and in scale with adjoining neighborhood structures.
- Consider movement of the plaza to the center of the block to the Monroe Street elevation and create a flatiron extension in place of its previous location at the corner of West Lawn Avenue and Monroe Street.

ACTION:

On a motion by Ald. Holtzman, seconded by Woods, the Urban Design Commission **GRANTED INITIAL APPROVAL**. The motion was passed on a vote of (6-1-1), with Barnett voting no and Wagner abstaining. The motion required address of the following:

- Explore alternatives to the design and relationship of the end elevation of the building abutting the proposed "neighborhood plaza" at West Lawn Avenue and Monroe Street. The applicant shall consider alternatives to the development of a residential unit (Unit 101) on the first floor level of the end elevation to make it a more public space along with consideration for retail use. As an alternative, the Commission emphasized the importance for the space to be public at grade level with the plaza or to be redesigned to accommodate alternative public uses.
- The proposed use of utility brick shall be eliminated in favor of standard modular brick.
- Provide documentation that the City Traffic Engineer will support the backing up of vehicles from the proposed loading area onto West Lawn Avenue as required to be approved by the Board of Public Works according to the email correspondence to Barnett.
- Provide documentation from the Fire Department as to their position to allow for the maintenance of only one existing tree with no new trees on the Harrison Street block face in order to address fire access requirements.

After the Commission acts on an application, individual Commissioners rate the overall design on a scale of 1 to 10, including any changes required by the Commission. The ratings are for information only. They are not used to decide whether the project should be approved. The scale is 1 = complete failure; 2 = critically bad; 3 = very poor; 4 = poor; 5 = fair; 6 = good; 7 = very good; 8 = excellent; 9 = superior; and 10 = outstanding. The overall ratings for this project are 7, 7, 7, 7.5, 8 and 9.

URBAN DESIGN COMMISSION PROJECT RATING FOR: 1864 Monroe Street

	Site Plan	Architecture	Landscape Plan	Site Amenities, Lighting, Etc.	Signs	Circulation (Pedestrian, Vehicular)	Urban Context	Overall Rating
Member Ratings	6	8	7	-	-	6	9	7
	8	6.5	7	7	-	6	6.5	7
	6	7	7	7	-	6	-	-
	9	9	-	-	-	8	10	9
	7	8	7	8	-	7	6	7.5
	-	-	-	-	-	-	-	8
	8	7	6	-	-	7	8	7
	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-

General Comments:

- A positive addition to Monroe Street
- Site access relating to truck maneuvering relating to R.O.W ; urban density – affordable housing.
- What will activate the west Lawn-Monroe corner? Ideally this space would have a major activity generator opening onto it: a grocery entrance, coffee shop, bar, etc with steps cascading down to the space. The Fire Lane tree exclusion zone is excessive. Good pedestrian-level frontage except for the parking ingress/egress – it should be entry only. Exiting cars should go onto Harrison only.
- Thoughtful solution to reviving neighborhood with mixed uses and landmark architecture.
- Very architecturally handsome and traditionally detailed. Did try to orient itself to the pedestrian. Addition of rooftop plaza creates an inviting and important open space.
- Exemplary urban design as a whole; this makes the lost opportunity to connect this project better to the public “plaza” all the more puzzling.
- Very important project. Needs to use a standard size brick to match other buildings in the neighborhood. Public space should be next to public space.

DRAFT

AGENDA # IV.A.

City of Madison, Wisconsin

REPORT OF: URBAN DESIGN COMMISSION

PRESENTED: January 5, 2005

TITLE: 1864 Monroe Street -- PUD(GDP-SIP),
Monroe Commons Mixed-Use
Development

REFERRED:

REREFERRED:

REPORTED BACK:

AUTHOR: Alan J. Martin, Secretary

ADOPTED:

POF:

DATED: January 5, 2005

ID NUMBER:

Members present were: Paul Wagner, Chair; Michael Barrett, Bruce Woods, Lou Host-Jablonski, Ald. Steve Holtzman, Robert March, Lisa Geer and Todd Barnett

SUMMARY:

At its meeting of January 5, 2005, the Urban Design Commission **GRANTED FINAL APPROVAL** of a PUD(GDP-SIP) for the redevelopment of 1864 Monroe Street, including the entire block with a five-to-six story building with lower level parking, first floor retail and fifty-one condominium units. Appearing on behalf and in support of the project was William Rusk and Jeffery J. Bogart of Eppstein Uhen Architects, Christopher Thiel of Schreiber Anderson, in addition to David and Thomas Keller. Registered and speaking in opposition was Dan Anderson. Since the Chair, Paul Wagner, announced his abstention from discussion and consideration on this item, Bruce Woods acted in the capacity of Chair on this item. The revised plans as presented emphasized the following:

- Based on meetings with the Fire Department, the landscape plan features the maintenance of many existing terrace trees on the property's various block faces, including additional canopy elements.
- A copy of a letter from the applicant to David Dryer, City Traffic Engineer was distributed to the Commission formally requesting approval by the Board of Public Works with a recommendation and support by the City Traffic Engineer to allow for the proposed backing-up of vehicles from a proposed loading area onto West Lawn Avenue.
- The request to utilize standard modular brick instead of utility brick would result in a substantial increase in the cost of the project based on estimates in the amount of \$195,000. According to the developer financial issues with the development of the project did not allow for favorable consideration of additional costs with the substitution of the brick.
- Consideration for an alternative retail/commercial use as a replacement of residential use in Unit 101 on the first floor level of the end elevation of the West Lawn Avenue/Monroe Street façade was addressed with a compromised proposal where the condominium documents would designate the use of the space as either residential and/or commercial retail use with language in the PUD documents allowing for commercial retail use as part of a minor alteration to an approved PUD-SIP. The development team desired to maintain flexibility and leave it to the market to provide for the direction on the use of the space. The development team further elaborated on the relationship of the West Lawn Avenue/Monroe Street end elevation to the plaza area and first floor unit space, emphasizing the separation from the street/public plaza level and structured parking level.

DRAFT

Following the presentation of the revised plans, the Commission expressed concerns on the following:

- The utilization of standard modular brick versus utility brick is still at issue. The use of standard modular brick provides an element that gives the project a human scale consistent with and complementing existing brick masonry structures within the area.
- The cost of the use of standard modular brick appeared to be minimal as a percentage of the total cost of the project.
- Dan Anderson, a neighborhood resident spoke against the project in regards to its bulk, height and mass, and questioned its consistency with the draft neighborhood plan's design provisions currently under development in coordination with the Dudgeon-Monroe Neighborhood Association.
- Several Commission members reiterated their concern that the previous request to modify the design of the Monroe Street/West Lawn Avenue end elevation to provide for the activation of the public plaza area was still not appropriately addressed.

ACTION:

On a main motion by Geer, seconded by Ald. Holtzman, the Urban Design Commission **GRANTED FINAL APPROVAL** of the project with an amendment. The main motion was passed on a vote of (7-0-1) with Wagner abstaining. An amendment to the main motion by Barnett, seconded by Host-Jablonski, passed on a vote of (4-3-1) with Geer, March and Ald. Holtzman voting no with Wagner abstaining. The amendment to the main motion required the following:

- Incorporate design amenities on the lower levels of the Monroe Street/West Lawn Avenue and elevation to provide vendor storage along with the conversion of Residential Unit #101 to a retail/commercial space that relates to and activates the "public space" in the adjacent pedestrian plaza.
- Replace the proposed use of utility brick with standard modular brick.

After the Commission acts on an application, individual Commissioners rate the overall design on a scale of 1 to 10, including any changes required by the Commission. The ratings are for information only. They are not used to decide whether the project should be approved. The scale is 1 = complete failure; 2 = critically bad; 3 = very poor; 4 = poor; 5 = fair; 6 = good; 7 = very good; 8 = excellent; 9 = superior; and 10 = outstanding. The overall ratings for this project are 6, 6, 7, 7, 7.5, 8 and 10.

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AGENDA # V.E.

City of Madison, Wisconsin

REPORT OF: URBAN DESIGN COMMISSION

PRESENTED: January 19, 2005

TITLE: 1864 Monroe Street - Revisions to
Previously Approved Building Materials
and Design Elements for the PUD(GDP-
SIP), Monroe Commons Mixed-Use
Development

REFERRED:

REREFERRED:

REPORTED BACK:

AUTHOR: Alan J. Martin, Secretary

ADOPTED:

POF:

DATED: January 19, 2005

ID NUMBER:

Members present were: Paul Wagner, Chair; Todd Barnett, Michael Barrett, Ald. Steve Holtzman, Lisa Geer, Bruce Woods, Robert March, and Lou Host-Jablonski

SUMMARY:

At its meeting of January 19, 2005, the Urban Design Commission **GRANTED FINAL APPROVAL** of revisions to a previously approved building materials and design elements PUD(GDP-SIP) for "Monroe Commons" mixed-use development located at 1864 Monroe Street. Appearing on behalf of the project was William Rusk and Jeffery J. Bogart of Eppstein Uhen Architects, in addition to David and Tom Keller. Registered and speaking in support was Mark A. Olinger, Director of the Department of Planning and Development. As a result of Wagner's abstention from consideration on this item, Host-Jablonski acted as Chair.

As an introduction to this item, Mark Olinger explained that the revisions to the previously approved building materials and design elements were largely an outcome of TIF allocation and Inclusionary Zoning waiver-related issues affecting the funding of the project. Staff was directed to re-evaluate the project in conjunction with the applicant to trim costs, enhance revenues, address Inclusionary Zoning issues, as well as the provision for proposed parking on the site to substitute for the loss of the Evergreen Public Parking area. The revised plans as presented featured the following:

- The overall architecture and design of the building including fenestration, is to be maintained in appearance.
- Standard modular brick is proposed to be utilized on the lower, first and second floor levels in combination with previously proposed decorative concrete masonry units and various pre-cast concrete features. The upper elevations above the second floor level previously proposed in various colors of masonry (interstate brick) are now proposed to feature stamped brick pattern EIFS in a standard modular size in the same color samples as previously proposed.
- The interior floor plan has been altered to increase the unit count from a previously proposed fifty-one units to fifty-three units to allow for the creation of three Inclusionary Zoning units.
- The western elevation has been simplified to eliminate larger-scale textured masonry and pre-cast banding along with the elimination of repetitive grillwork with modified fenestration that maintains a pattern of louvered openings necessary for air intakes and exhaust intakes into the structure.

- The Monroe Street lower level façade has been redone to increase the amount of interior floor area of the storefront along with ramping and a partial reduction of the previously proposed recessed colonnade feature.

Following the presentation, the applicant noted that in response to issues relevant to the requirement for a grocer within the first floor retail space, that the Planning staff report on the PUD requires as a condition of approval to demonstrate a lease for a grocer to prior to final sign-off on the project. In a discussion on the modifications to the previously approved building façade, several members expressed their concern that the use of EIFS with a stamped brick pattern would set a precedent for the use of other “faux/pseudo” building materials on a building which intended in design to reflect traditional architecture. The use of the brick-patterned EIFS also raised concerns about its durability, longevity and long-term maintenance issues.

ACTION:

On a motion by Ald. Holtzman, seconded by Geer, the Urban Design Commission **GRANTED FINAL APPROVAL** to the changes as presented. The motion was passed on a vote of (4-2-1) with Barnett and Barrett voting no and Wagner abstaining.

After the Commission acts on an application, individual Commissioners rate the overall design on a scale of 1 to 10, including any changes required by the Commission. The ratings are for information only. They are not used to decide whether the project should be approved. The scale is 1 = complete failure; 2 = critically bad; 3 = very poor; 4 = poor; 5 = fair; 6 = good; 7 = very good; 8 = excellent; 9 = superior; and 10 = outstanding. The overall ratings for this project are 2, 5, 7, 7, 7.5 and 8.

URBAN DESIGN COMMISSION PROJECT RATING FOR: 1864 Monroe Street

	Site Plan	Architecture	Landscape Plan	Site Amenities, Lighting, Etc.	Signs	Circulation (Pedestrian, Vehicular)	Urban Context	Overall Rating
Member Ratings	-	-	-	-	-	-	-	2 (changes)
	-	-	-	-	-	-	-	8
	5	4	5	6	-	5	6	5
	-	6	-	-	-	-	8	7
	7	6	7	7	-	8	8	7
	-	-	-	-	-	-	-	7.5
	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-

General Comments:

- Stucco brick is a step back. This has become a great disappointment and sets an awful precedent to use simulated materials anywhere.
- Revised design details and substitute materials produce savings with minimal impact, to what can still be regarded a landmark building
- EIFS as a cladding material is offensive. Losing outdoor space in the front is a serious loss. Air intake louvers over loading zone?
- Synthetic brick a risk.
- Changes proposed forecast savings; does not appear to sacrifice the design appearance and integrity.
- Design is still exemplary, even though it'll be executed in a less-durable material.

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From: Audrey Highton <achighton@yahoo.com>
To: Robin Ryan <lessie@chorus.net>, 'Shawn Schey' <sschey@wisc.edu>, 'John shenot@hotmail.com' <john_shenot@hotmail.com>, 'Kathy Lederhause & Daryl Sherman' <snippets@execpc.com>, Orange Shroeder <OrangeTreelmp@aol.com>, Judy Sikora <jsikora@charter.net>, Brian Solomon <brian.solomon@dwd.state.wi.us>, Char Thompson <chart@madison.tds.net>, 'Gretchen Twietmeyer' <twiet@herricklaw.net>, Katy Werner <katyjwerner@sbcglobal.net>, Dave Worzala <dworzala@ameritech.net>, Dan Johnson <dejohnsonwilmot@viterbo.edu>, Julia Kerr <julia.Kerr@sbcglobal.net>, Gina Krapf <gkrapf@inc.com>, Tom Kuplic <tbkuplic@wisc.edu>, 'Shirley Lake' <leylake@hotmail.com>, 'Kathy Madison' <kmmadison2000@yahoo.com>, 'Julie Meyer' <juliemeyer@ameritech.net>, Tess Mulrooney <timmidsn@aol.com>, Brad Murphy <bmurphy@cityofmadison.com>, 'margaret nelson' <mvnelson@facstaff.wisc.edu>, Al nettleton <aaNett@execpc.com>, Cami L Peterson <cami.peterson@dnr.state.wi.us>, 'Don Peterson' <dpeterson@mge.com>, 'don peterson' <kspeters@facstaff.wisc.edu>, Lynn Pitman <lpitman@chorus.net>, Ron Radano <rmradano@wisc.edu>, 'Sue Reindollar' <ssreindo@powercom.net>, Jane Riley <jane.riley@dnr.state.wi.us>, Jane Riley <murriley@charter.net>, <appelsin@aol.com>, 'bill barker' <barker@geology.wisc.edu>, 'Kathie Beckett' <kathie@cable.doit.wisc.edu>, 'paul beckett' <pbeckett@facstaff.wisc.edu>, 'Joanne Brown' <brown@primate.wisc.edu>, <bvandenbrook@ci.madison.wi.us>, 'Ann D. Clark' <annclark@popmail.tds.net>, 'Mary Jo Croke' <maryjo@terracom.net>, Colleen Dunlavy <cdunlavy@wisc.edu>, 'Ken Golden' <district10@cityofmadison.com>, Robert Goode <bobgoode@sbcglobal.net>, Andy Heidt <district13@cityofmadison.com>, 'Tom Huber' <huberma@chorus.net>
Date: 1/24/2005 2:11:50 AM
Subject: URGENT - City of Madison Plan Comm Mtg for Monroe Commons

All, Here is the letter that DMNA will be reading at the planning commission meeting on Monday nite. Any and all of you who have concerns or ideas which you wish to express please come to the meeting. Negotiations for this development continued through last week and the council and working group held an emergency mtg on Saturday to reach a consensus. The mtg is Monday, Jan 24th at 5:30, Rm 201, Council Chambers, City Council Building.

Thanks for all your input over the last 6 months. Audrey

City of Madison

Planning Commission

January 23, 2005

Dear Commissioners:

The Dudgeon-Monroe Neighborhood Association Council has recently met and this letter is to confirm that the Dudgeon-Monroe Neighborhood Association would like to offer its support for the proposed Monroe Commons development conditional on the inclusion of a full-service grocery (Later in this letter we would also like to reflect on some related concerns.)

We appreciate the quality that the developers are trying to bring to this project and also commend their willingness to give of their time. They have held, as well as attended, numerous neighborhood meetings.

Though some neighbors and council members have serious concerns regarding the scale and mass of the proposed building, given the neighborhood's need for a grocery to replace Ken Kopp's Grocery we are willing to compromise on the height of the building which we feel is out-of-scale with the neighborhood and exceeds the acceptable range of 3-4 stories noted in our nearly complete planning grant document as long as a full-service grocery is present. Therefore, this unique development should not be viewed as setting a precedent.

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Further, our support is contingent upon a minimum 10 year grocery lease between the owner and the grocery store for all of the commercial space in the project to be signed before the final PUD is recorded and building permits are issued. The neighborhood wants a full-service grocery that we can use as our primary shopping destination for groceries, where at least 10% of sales comes from each of the following: produce, meat and fish, deli, and dry goods as calculated over a reasonable period of time (month or year).

We would also like to note and express our concern in regards to the following related issues:

- 1) That part of the inclusionary zoning requirements for designated IZ units state that any condo fees assessed to the IZ units remain affordable.
- 2) We also have a concern with the safety of the underground parking access, especially for pedestrians from the plaza entrance and that efforts be made to ameliorate this with cameras, monitors or other devices as deemed acceptable by the Madison Police department with input from the neighborhood
- 3) Due to the heavy usage of West Lawn Street by residents and proposed grocery vendors, whose semi-trucks would need to make a right hand turn onto West Lawn from Harrison, we strongly suggest the inclusion of traffic calming (i.e. a speed table or raised crosswalks) for the entire intersection be considered by the city's departments of transportation and public works, and be included when the street is reconstructed

Finally, in order to make as smooth and successful as possible a transition from demolition to completion, we are hopeful that the positive lines of communication continue between the neighborhoods, developers, businesses and city as this project progresses from the drawing board to reality.

Sincerely,

Daryl Sherman

President of DMNA

and Audrey Highton

Secretary of DMNA and

Chair of Monroe Commons Working Group Committee

From Dave Keller on Sat 1/22 at 4:14

The Board of Estimates did not accept our request for \$3 13 million of TIF assistance. Our request was approx 77% of the new TIF increment generated by the development. The City has a TIF policy that they will provide 50% of the increment for a project with a 10% bonus if affordable housing is included. We added three IZ units, reduced our fees, increased the sales revenues and reduced the projects construction costs to allow us to get under the 60% TIF increment threshold.

In regards to the Plan Commission approving the re-zoning prior to action being taken by the Board of

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Estimates, the Planning Staff report has put additional conditions on the project that the TIF must be approved and that a 10 year grocery store lease be shown to the Director of Planning and Development (Mark Olinger) prior to us recording the PUD-SIP zoning and starting construction

From David Keller To: Kathy Lederhause & Daryl Sherman Sent: Friday, January 21, 2005 11:43 AM

Sorry for the delay in responding. The proposed minor alterations to the exterior of the Building (use of simulated brick above the first floor and minor alteration to the front colonnade) were approved by the Urban Design Commission last Wednesday evening, which was a very critical and positive development on closing the TIF gap

Regarding the IZ, we have incorporated 3 IZ units into the development. 2 one bedrooms that will be marketed around \$120,000 and 1 three bedroom that will be marketed around \$155,000. This reduces the amount of the waiver payment significantly. We have received a positive report from Planning Staff (incorporating the requirement of a grocery store as a prerequisite to the start of construction) and we will appear Monday night at the Plan Commission. Our appearance before the Board of Estimates originally planned for Monday night has been moved to the February 14th meeting. We are still hoping for final Council approval sometime in February 2005. Hope this answers your questions and feel free to call me at home this weekend (273-2499)

Thanks!!!!

Monroe Neighbors, LLC David C. Keller Keller Real Estate Group 448 West Washington Ave. Madison, WI 53703 608-227-6543 x 102, FAX 608-255-5005 www.KellerRealEstateGroup.com

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PART A

Occupant Notification Fee: \$50
 Rezoning and Conditional Use application fees see attached.

The following information is **REQUIRED** for ALL applications for Plan Commission review:

FOR OFFICE USE ONLY:

Amt. Paid \$1250 Receipt # 55797
 Date Received 10-27-04
 Parcel No. 0709-223-1803-4, 1802-1
 Aldermanic District 10- Ken Golden
 GQ _____
 Zoning District C-1

For complete submittal:

Application
 Legal Description
 Letter of Intent
 Plans
 Zoning Text
 Received By KW
 Alder Notif. Waiver _____
 Nbr. Assn. Notif. 1/2/04 Waiver _____
 Issued Sign _____

1. Address of Site: 1802-1864 MONROE ST
 Name of Project: MONROE COMMONS
 Acreage of Site: 0.91816 (39,995 SQ. FT.)

2. This is an application for (check at least one):
 Rezoning from C1-R2 to PUD/GDP/SIP
 Conditional Use
 Demolition Permit (Please provide age, City assessment, and the condition of the building(s) to be demolished. Provide photos.)
 Other (Describe) _____

3. You must include or attach a **legal description**—Lot and block number of recorded certified survey map or plat, or metes and bounds by surveyor, engineer, title company, etc., (Note: A "Plat of Survey" or "Site Plan" is NOT a legal description). Any extra costs to the City, because of legal description problems, are to be paid by the applicant. **(Any application, without a proper, complete and appropriate legal description, will NOT be processed).** See attached instruction sheet regarding submittal of legal descriptions on computer diskette.
SEE ATTACHED "EXHIBIT A"

4. General description of the project or intended use(s) of this property.
MIXED-USE REDEVELOPMENT OF FORMER KEN KOPPS SITE AND ADJACENT EVERGREEN PARKING LOT. IT WILL CONSIST OF APPROX. 12,000 SQ. FT. OF COMMERCIAL/RETAIL SPACE, TWO LEVELS OF BELOW GRADE PARKING AND APPROX. 51 OWNER-OCCUPIED CONDOMINIUM UNITS.

5. Are there existing buildings on this site? YES
 What is the present zoning of this site? C1-R2
 What are the present uses of this site? VACANT COMMERCIAL BUILDING AND SURFACE PARKING

6. Do you intend to use the existing building(s)? No

40

7. What exterior changes are proposed to the existing building(s)? DEMOLITION

8. What interior changes are proposed to the existing building(s)? DEMOLITION

9. Are you proposing to add or build new dwelling units? YES
How many units? 51
Owner occupied 51 selling price, from \$ 199,500 to \$ 749,500
Rental N/A rent levels, from \$ N/A to \$ N/A

10. For rental housing will you be accepting Section 8 housing vouchers? N/A

11. When do you wish to occupy this site or building? UPON COMPLETION (APRIL, 2006)

12. Does this proposal involve any development in the public right-of-way? _____
No X Yes _____ Explain: _____

13. Please print (or type) name and mailing address of the property owner. (Please include all owners involved in partnerships) SEE ATTACHED

Phone: 227-6543 Fax: 255-5005

Please print (or type) name and mailing address of contact person for this project [the person that can answer any questions regarding this application or project plans and will appear at the public hearing(s)]. THOMAS KELLER

MONROE NEIGHBORS, LLC
448 W. WASHINGTON AVE 53703
Phone: 227-6543 Fax: 255-5005

14. Property owner's authorization signature: John G. Keller
[If offer to purchase or contract owner, please indicate below (check one). Architect's, real estate agent's, contractor's or tenant's signature is NOT adequate].
X Owner _____ Offer to Purchase _____ Other (Explain _____)

15. It is extremely important that you inform the ALDERPERSON and NEIGHBORHOOD ASSOCIATION of this district about your proposal as soon as possible. As required by Section 28.12(10)(c) and (d), I have notified Alderperson KEN GOLDEN and N/A of the N/A Neighborhood Association in writing by mail no less than thirty (30) days prior to this submittal.

Yes _____ No X ALDER WAIVER
Date that the alderperson was notified: N/A
Date that the Neighborhood Association was notified: N/A



16. NOTE: The Alderperson and/or Neighborhood Association notice requirement may be waived if approved by the Alderperson, President of the Neighborhood Association, and Director of the Department of Planning and Development prior to submitting your application.

For Conditional Use Applications, the Zoning Ordinance states:

“Section 28.12(11)(g), Standards. The City Plan Commission shall grant no application for a conditional use unless such commission shall find all of the following conditions are present:

(g) Standards. The City Plan Commission shall grant no application for a conditional use unless such commission shall find all of the following conditions are present:

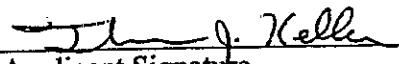
1. That the establishment, maintenance or operation of the conditional use will not be detrimental to or endanger the public health, safety, comfort or general welfare.
2. That the City be able to provide municipal services to the property where the conditional use is proposed, given due consideration of the cost of providing such services.
(Cr. by Ord. 13,012, 2-26-02)
3. That the uses, values and enjoyment of other property in the neighborhood for purposes already established shall be in no foreseeable manner substantially impaired or diminished by the establishment, maintenance or operation of the conditional use.
4. That the establishment of the conditional use will not impede the normal and orderly development and improvement of the surrounding property for uses permitted in the district.
5. That adequate utilities, access roads, drainage, parking supply, internal circulation improvements, including but not limited to vehicular, pedestrian, bicycle, public transit and other necessary site improvements have been or are being provided.
6. That measures have been or will be taken to provide adequate ingress and egress, including all off-site improvements, so designed as to minimize traffic congestion and to ensure public safety and adequate traffic flow, both on-site and on the public streets.
7. That the conditional use shall conform to all applicable regulations of the district in which it is located.
8. That when applying the above standards to an application by a community living arrangement the City Plan Commission shall:
 - a. Bear in mind the City's general intent to accommodate community living arrangements.
 - b. Exercise care to avoid an over-concentration of community living arrangements, which could create an institutional setting and seriously strain the existing social structure of a community. Considerations relevant for this determination are:
 - i. The distance separating the proposed community living arrangement from other such facilities
 - ii. The capacity of the community living arrangement and the percent the facility will increase the population of the community.
 - iii. The total capacity of all the community living arrangements in the community.
 - iv. The impact on the community of other community living arrangements.
 - v. The success or failure of integration into communities of other community living arrangements operated by the individual or group seeking the conditional use permit.
 - vi. The ability of the community to meet the special needs, if any, of the applicant facility.

4

- 9. That when applying the above standards to any new construction of a building or an addition to an existing building the City Plan Commission:
 - a. Shall bear in mind the statement of purpose for the zoning district such that the proposed building or addition at its location does not defeat the purposes and objective of the zoning district, and
 - b. May require the applicant to submit plans to the Urban Design Commission for comments and recommendations, and
 - c. May consider the use of the proposed building as it relates to the City's Land Use Plan. When a conditional use application is denied, the Plan Commission shall furnish the applicant in writing those standards that are not met and enumerate reasons the Commission has used in determining that each standard was not met.
- [Sec. 28.12(10)(g)8., Cr. by Ord. 5869, 6-1-77]

The undersigned applicant or authorized agent of the applicant hereby certifies that he or she has read all of the information contained in this application and that the same is true and correct.

The undersigned further understands and agrees that any review, recommendation, approval, or permit, based upon any statement, drawings, plans, evidence or information furnished by the applicant or any agent of the applicant to the Plan Commission or Common Council with respect to the project which is the subject of this application and which at the time made is misleading, inaccurate, untrue or incorrect in any material respect, shall be declared null and void by the Commission, issuing written notice thereof to the applicant or designated agent without further public hearing.

	PARTNERSHIP MEMBER	10/27/04
Applicant Signature	Relationship to Owner	Date

Please print (or type) name and mailing address of above applicant: THOMAS J. KELLER
448 W. WASHINGTON AVE
MADISON, WI 53703
 Phone 227-6543 Fax 255-5005

The following material is REQUIRED for all applications:

- a. Twelve (12) copies of a Letter of Intent describing this application in detail, including: Construction schedules, names of people involved (contractor, architect, landscaper, business manager, etc.), types of businesses, hours of operation, square footage or acreage of the site, number of dwelling units, number of employees, gross square footage of building, number of parking stalls, etc.
- b. Seven (7) copies of "Full Size" scaled site plans and seven (7) copies of reduced site plans on 11 inch by 17-inch paper. Scaled site plans to be drawn at a scale of one-inch equals 20 feet. All plan sets must include: A site plan showing all lot lines, building locations, building additions, demolitions, or changes, parking areas, driveways, sidewalks, location of any new signs, existing and proposed utility locations, and landscaping. Also include building elevations and floor plans. Plans must be drawn to scale and include all dimensions.



- c. A full and complete legal description of the site or property being subjected to this application. See attached instruction sheet regarding submittal of legal descriptions on computer diskette.
- d. A proper street address for this project as reflected by official City records or as officially assigned by the City Engineering Division.

Failure to submit any of the above-required items will result in the delay of scheduling your application for Plan Commission and/or Common Council review.

EXHIBIT A

PARCEL 1:

LOTS ONE (1), TWO (2), THREE (3), FOUR (4), FIVE (5) AND SIX (6), BLOCK TWENTY-SEVEN (27), FIRST ADDITION TO WEST LAWN, IN THE CITY OF MADISON, DANE COUNTY, WISCONSIN.

PARCEL 2:

THE SOUTHWEST ONE-HALF (1/2) OF LOT NINE (9), BLOCK ONE (1), EVERGREEN PARK, IN THE CITY OF MADISON, DANE COUNTY, WISCONSIN.

W

MONROE COMMONS OWNERSHIP

Monroe Commons is owned by Monroe Neighbors, LLC.
Monroe Neighbors, LLC. Consists of the following four entities:

TRIO Development

Craig D. Hungerford

Jill C. Hochhausen

Bryce W. Armstrong

448 W. Washington Ave.

Madison, WI. 53703

The Slinde Company

Bert Slinde

802 W. Broadway

Suite 217

Madison, WI. 53713

FSKR, LLC

Fred Miller

Sandy Miller

2318 Vondron Rd.

Madison, WI. 53718

Keller Development LLC

Thomas J. Keller CCIM

David C. Keller

448 W. Washington Ave.

Madison, WI. 53703

41

October 27, 2004

Mr. Brad Murphy
Director of Planning
Department of Planning and Development
City of Madison
215 Martin Luther King Blvd.
PO Box 2985
Madison, WI 53701-2985

RE: Letter of Intent
1802-1864 Monroe St.
Planned Unit Development
General Development Plan
Specific Implementation Plan

Dear Mr. Murphy:

The following is submitted together with the plans, application and zoning text for staff, plan commission and Common Council consideration of approval of the proposed development.

OWNER / DEVELOPER:

Monroe Neighbors, LLC
448 W. Washington Ave.
Madison, WI. 53703
608-227-6543
608-255-5005 (fax)

ARCHITECT:

Eppstein UHEN
333 E. Chicago St.
Milwaukee, WI. 53202
414-271-5350
414-298-2251

BACKGROUND

The site for the proposed development is located at 1802-1864 Monroe Street. It is the former site of the Ken Kopp's grocery and also includes the City of Madison parking lot known as the Evergreen Lot. The proposal calls for the demolition of the old Ken Kopp's grocery building and construct a single structure consisting of approximately 12,000 square feet of neighborhood commercial/retail space, approximately 24 covered, open air parking stalls, approximately 105 parking stalls on two levels of below grade parking and approximately 51 owner occupied condominium units.

SITE DEVELOPMENT STATISTICS

Please refer to the attached Exhibit entitled SITE DEVELOPMENT STATISTICS

SITE AND BUILDING ARCHITECTURE

The proposed development significantly improves the Monroe Street streetscape in several ways:

Removes unsightly surface parking on Monroe Street and creates a balance of commercial space with the commercial space on the other side of Monroe Street.

Provide a whole block redevelopment solution to an odd shaped parcel which contains excess surface parking.

Removes the blighted old Ken Kopp's grocery and replaces it commercial space that is more functional, efficient and attractive.

Replaces the Evergreen Parking Lot, a surface lot, with covered parking and creates a public open space at the corner of Monroe Street and West Lawn.

Create the possibility of a neighborhood grocery opportunity at the site of the former Ken Kopp's.

Provide a mix of owner-occupied housing, in an area well served by public transportation.

Removes one curb cut along the Monroe Street Corridor and adds additional street parking on Harrison Street.

Provide an efficient use of an underutilized site.

PROJECT SCHEDULE AND MANAGEMENT

It is expected that construction of the project would commence in January of 2005, with completion in April of 2006, and both residential and commercial occupancy immediately following.

The members of Monroe Neighbors, LLC has a history of analysis, construction and marketing of redevelopment properties such as this.

DWELLING UNIT INFORMATION

The proposed project will include 51 owner-occupied dwelling units. 17 units will be 1-bedroom, 25 units will be 2-bedroom and 9 units will be 3 bedrooms. The square footage of the units will range between 950 square feet to 2,800 square feet. The proposed project will have 94 bedrooms.

COMMERCIAL UNIT INFORMATION

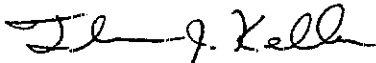
The proposed project will include approximately 12,000 square feet of commercial/retail space. The 12,000 square feet will be contiguous and at street level. It will have segregated below grade parking with access from both elevator and stairs. The number of employees is not known at this time. The amount of employees will be subject to the end user.

SOCIAL AND ECONOMIC IMPACTS

The proposed project will provide redevelopment of an under-utilized and blighted parcel in the heart of the Monroe Street business area. The mixed use development is consistent with both historic and current uses in the immediate neighborhood. The project is within walking distance of the Edgewood Campus, Monroe and Regent Street business areas, Camp Randall Stadium and the University of Wisconsin campus. Property values will be increased without major increases in City expenses or demands on City services.

Thank you for reviewing this proposal. If you have any questions, please don't hesitate to contact me.

Sincerely,



Thomas J. Keller CCIM
Keller Development LLC



SITE STATISTICS

	BUILDING SIZE								
	LOT SIZE	LL PARKING	UL PARKING	1ST FLOOR	2ND FLOOR	3RD FLOOR	4TH FLOOR	5TH FLOOR	TOTAL
CURRENT	39,995	N/A	N/A	10,000	N/A	N/A	N/A	N/A	10,000
PROPOSED	39,995	32,192	32,187	34,863	25,002	24,211	24,211	24,211	196,877

	UNIT COUNT			
	1BDRMS	2BEDRMS	3BDRMS	TOTAL
CURRENT	N/A	N/A	N/A	N/A
PROPOSED	17	25	9	51

	PARKING				
	STREET	SURFACE	LL PARKING	UL PARKING	TOTAL
CURRENT	15	25	N/A	N/A	40
PROPOSED	22	24	66	39	151

PROPOSED BUILDING SQUARE FOOTAGE INFORMATION

	GROSS SQ.FT.
PARKING (LOWER)	32,192
PARKING (UPPER)	32,187
FIRST FLOOR	34,863
SECOND FLOOR	25,002
THIRD FLOOR	24,211
FOURTH FLOOR	24,211
FIFTH FLOOR	24,211
TOTAL	196,877

4

**PLANNED UNIT DEVELOPMENT
GDP-SIP ZONING TEXT
MONROE COMMONS
1802,1812,1856,1862 & 1864 MONROE ST.
CITY OF MADISON, WISCONSIN**

- LEGAL DESCRIPTION:** The lands subject to this Planned Unit Development shall include those described in the attached exhibit A.
- STATEMENT OF PURPOSE:** This zoning district is established to allow for the creation of a mixed use development with approximately 51 residential units, approximately 12,000 square feet of neighborhood commercial/retail space and 129 surface and below grade public and private parking stalls.
- PERMITTED USES:**
- 1 Those stated as permitted in the R-6 and C-1 zoning districts.
 - 2 Uses accessory to permitted uses listed above.
- LOT AREA:** 39,995 square feet.
- FLOOR AREA RATIO:**
- 1 Maximum floor area ratio shall be as shown on approved plans.
 - 2 Maximum building height shall be as shown on approved plans.
- YARD REQUIREMENTS:** Yard areas will be provided as shown on the approved plans.
- LANDSCAPING:** Site landscaping will be provided as shown on the approved plans.
- ACCESSORY OFF-STREET
PARKING AND LOADING:** Accessory off-street parking and loading shall be provided as shown on the approved plans.
- LIGHTING:** Site lighting will be provided as shown on the approved plans.
- SIGNAGE:** Signage will be allowed as per Chapter 31 of the City of Madison General Ordinances, as compared to the C-1 district.
- FAMILY DEFINITION:** The family definition for this PUD-SIP shall coincide with the definition given in Chapter 28.03(2) of the Madison General Ordinances for the R-6 zoning district.
- ALTERATIONS/REVISIONS:** No alteration or revision of this Planned Unit Development shall be permitted unless approved by the City Plan Commission, however, the Zoning Administrator may issue permits for minor alterations or additions which are approved by the Director of Planning and Development and the district alderperson and which are compatible with the concept stated in the underlying General Development Plan approved by the City Plan Commission.

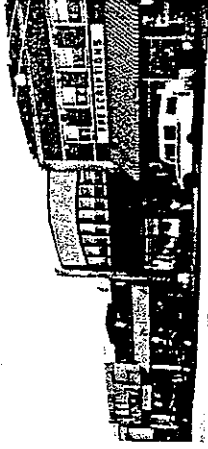
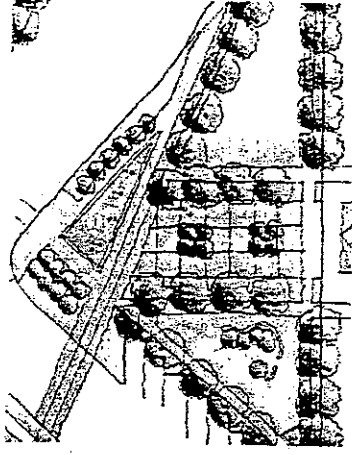
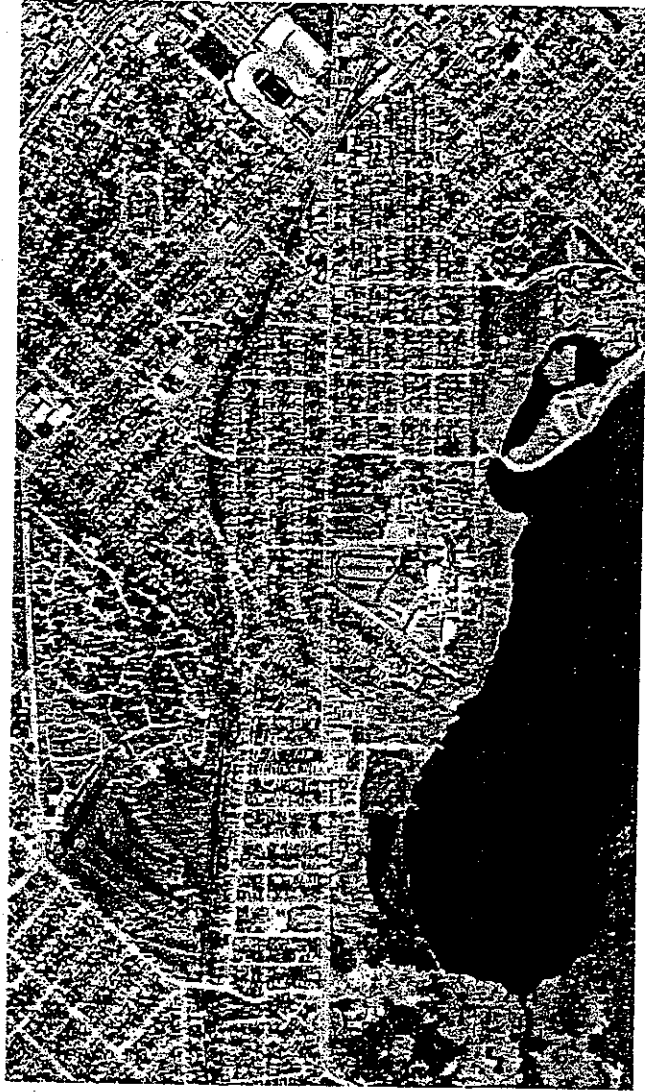
4

Monroe Street Commercial District Plan

Dudgeon-Monroe and Vilas Neighborhood Associations and the Monroe Street Merchants Association

Prepared by Planning & Design Institute Inc. with Business Districts Inc.

Final Report
December 15, 2004



PLANNING AND DESIGN INSTITUTE, INC. 241 N BROADWAY SUITE 300 MILWAUKEE WI 53202 414.271.2542 414.271.2542



service areas should be visually screened by walls, fences, or landscape materials.

8. Area # 13: Redevelopment Opportunity, Short Term

Future redevelopment should adhere to the general guidelines noted in section J as well as the following site-specific development guidelines:

- **Build-To-Line:** Building to be built out to the sidewalk along Monroe and Harrison. Slight setbacks are possible for locating sidewalk cafes or pedestrian features.
- **Building Heights:** 3-4 stories, with a potential 5th level possible if a grocery store is provided at the ground floor. The 5th level should be set back from the front façade line. If a grocery store is not provided, the maximum height would be 2-3 stories with the 3rd floor set back. In any condition building height should step down in the rear in order to make a transition to the scale of the residential neighborhood along Lawn Street.
- **Building Composition, Articulation, and Scale:** The building mass should respect the overall pattern of the street by emphasizing verticality rather than horizontality. A long building should be visually broken up into smaller subunits that replicate the sense of scale along the street. Facades along Monroe should have storefronts with architectural details attractive to pedestrians. A pedestrian-friendly façade with ample windows or openings should also be provided along Harrison. Any enclosed parking structure should be designed to integrate with the architecture and any openings designed to appear as "windows" or part of the building fenestration system. The building elevation along Lawn must be designed as a "front" rather than a "back, utilizing the same materials as the Monroe St. elevation.
- **Special Architectural Features:** The pointed corner of the site at Monroe & Lawn is a prominent location which deserves an appropriate architectural response in the form of a tower, projecting bay, special window or other feature.
- **Entrances:** Principal building entrances should be off of Monroe. Secondary entrances can occur off Harrison.
- **Service and Parking:** The resolution of parking and service access on this site will be crucial, since the rear of the building faces a residential neighborhood along Lawn Street. Service areas must be not only be screened but made to appear as part of the architecture of the building. Parking and service traffic along Lawn should be discouraged as much as possible.

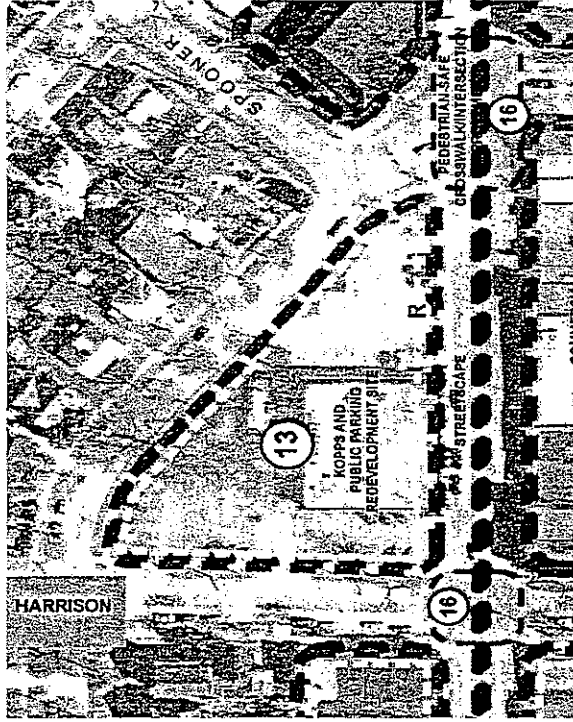
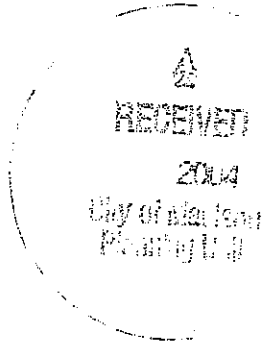


Figure K-5: Redevelopment Opportunity Area 13



Dudgeon-Monroe Neighborhood Association
Dudgeon Center
Monroe Street
Madison, WI 53711

Mr. David Keller
Monroe Partners
448 West Washington Ave.
Madison, WI 53703

Dear Dave:

The D-MNA Council at our monthly meeting on November 10 voted unanimously for the following proposal:

Dudgeon-Monroe Neighborhood Association council support for the Monroe Commons development moving forward is contingent upon the inclusion of a full service grocery. If the full service grocery as anchor is not included as part of the application we will need to reconsider our support.

Thank you for your time and efforts in this direction.

Sincerely yours,

Dr. Audrey Highton
Chair, Working Group
Secretary, D-MNA Council
609 Chapman St.
Madison, WI 53711
achighton@yahoo.com
(608) 233-2155

cc: Ken Golden, Alder District 10
Brad Murphy, Dept. of Planning & Development

41



MONROE COMMONS
1864 MONROE STREET
MADISON, WISCONSIN



PUD GDP SIP SUBMITTAL

OCTOBER 27TH, 2004

EUA PROJECT NUMBER: 1-04161-01

ERPSTEIN UHEN
 ARCHITECTS
 1800 Chicago Street
 Milwaukee, WI 53233
 TEL: 414.224.1100
 FAX: 414.224.1101
 WWW.ERPSTEINUHEN.COM

MONROE COMMONS

SAA
 ARCHITECTURAL
 ASSOCIATION OF
 WISCONSIN

MONROE COMMONS
 1804 MONROE STREET
 WAUKESHA, WISCONSIN

PROGRESS DOCUMENTS
 THIS DOCUMENT IS A PRELIMINARY DESIGN AND SHALL BE USED ONLY FOR THE PURPOSES INDICATED HEREIN. IT IS NOT TO BE USED FOR CONSTRUCTION OR AS A BASIS FOR ANY OTHER DESIGN OR CONTRACT. THE USER SHALL BE RESPONSIBLE FOR OBTAINING ALL NECESSARY PERMITS AND FOR VERIFYING THE ACCURACY OF ALL INFORMATION PROVIDED HEREON.
 DATE: 10/08/2014

PUD GUP SIP SUBMITTAL

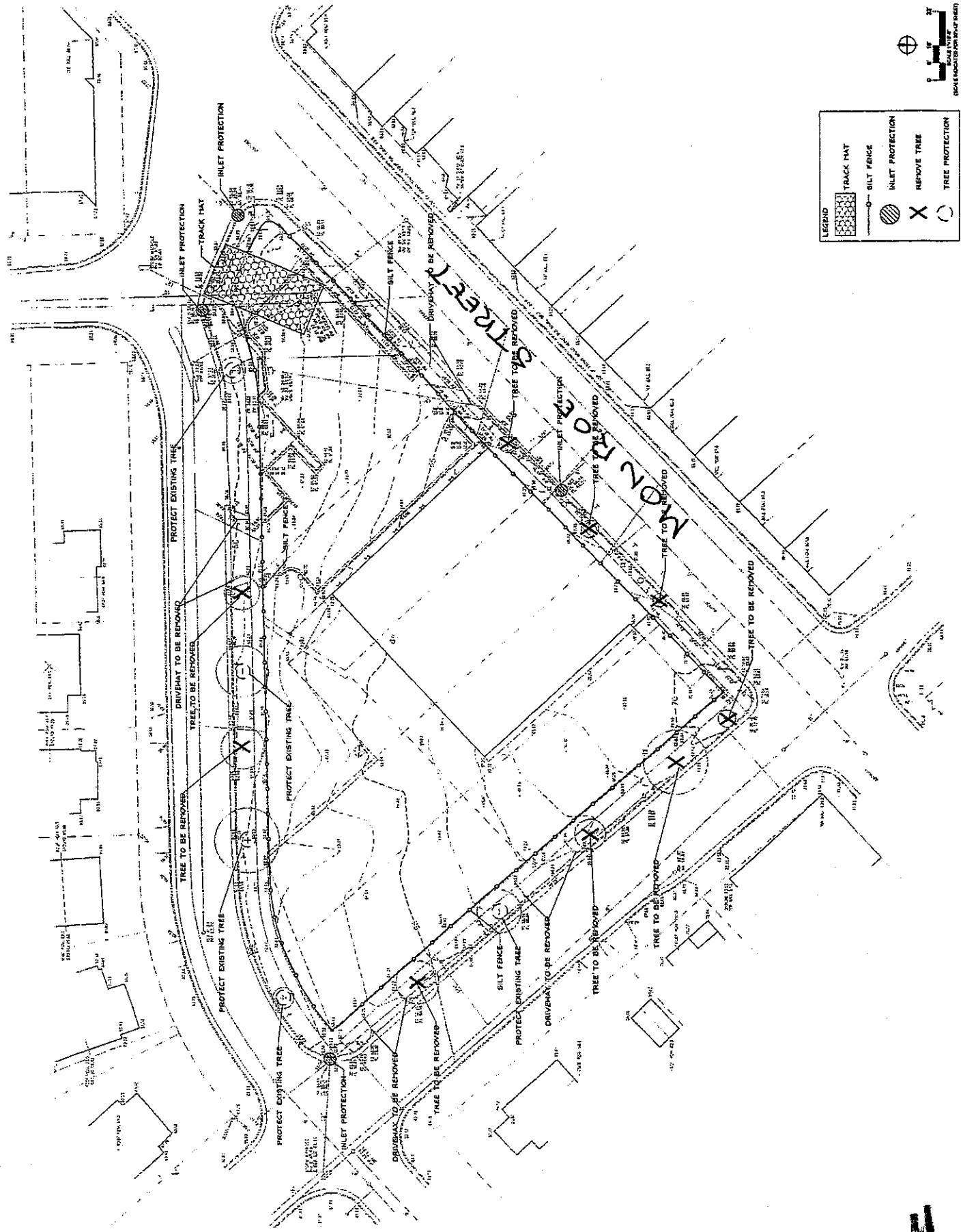
REVISION EROSION CONTROL PLAN

APPROVAL	DATE
DESIGNED BY	DATE
DRAWN BY	DATE
CHECKED BY	DATE
PROJECT NUMBER	DATE
PROJECT NAME	DATE
DATE	DATE
SCALE	DATE



LEGEND

[Hatched Box]	TRACK MAT
[Circle with Dotted Pattern]	SILT FENCE
[Circle with Diagonal Lines]	INLET PROTECTION
[X]	REMOVE TREE
[Circle]	TREE PROTECTION



4

EPPSTEIN UHLEN
 23244 Chicago Street
 Milwaukee, WI 53227
 Tel: 414.381.1000
 Fax: 414.381.1001
 www.eppsteinuhlen.com

MONROE COMMONS

SAA
 SURVEILLANCE AND
 ASSESSMENT INC.

MONROE COMMONS
 1864 MONROE STREET
 MADISON, WISCONSIN

PROGRESS DOCUMENTS
 This drawing was prepared by the Engineer and is based on the information provided by the client. The Engineer is not responsible for the accuracy of the information provided by the client. The Engineer is not responsible for the accuracy of the information provided by the client.

PUD GIP SIP SUBMITTAL
 RETAIN

DATE OF UTILITY PLAN

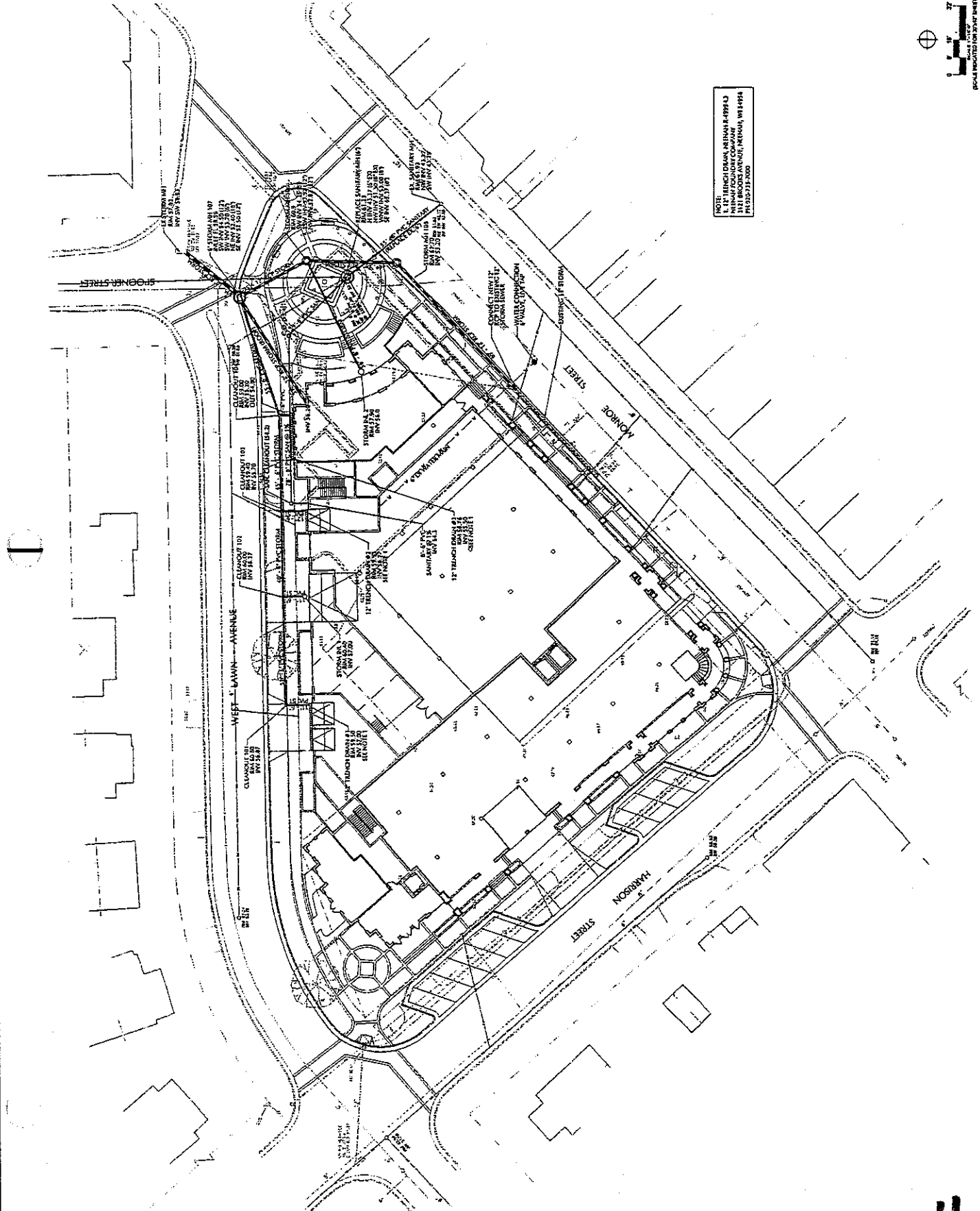
DESIGNER	DATE	BY	DL
PROJECT MANAGER	DATE	BY	DL
REVISIONS	DATE	BY	DL

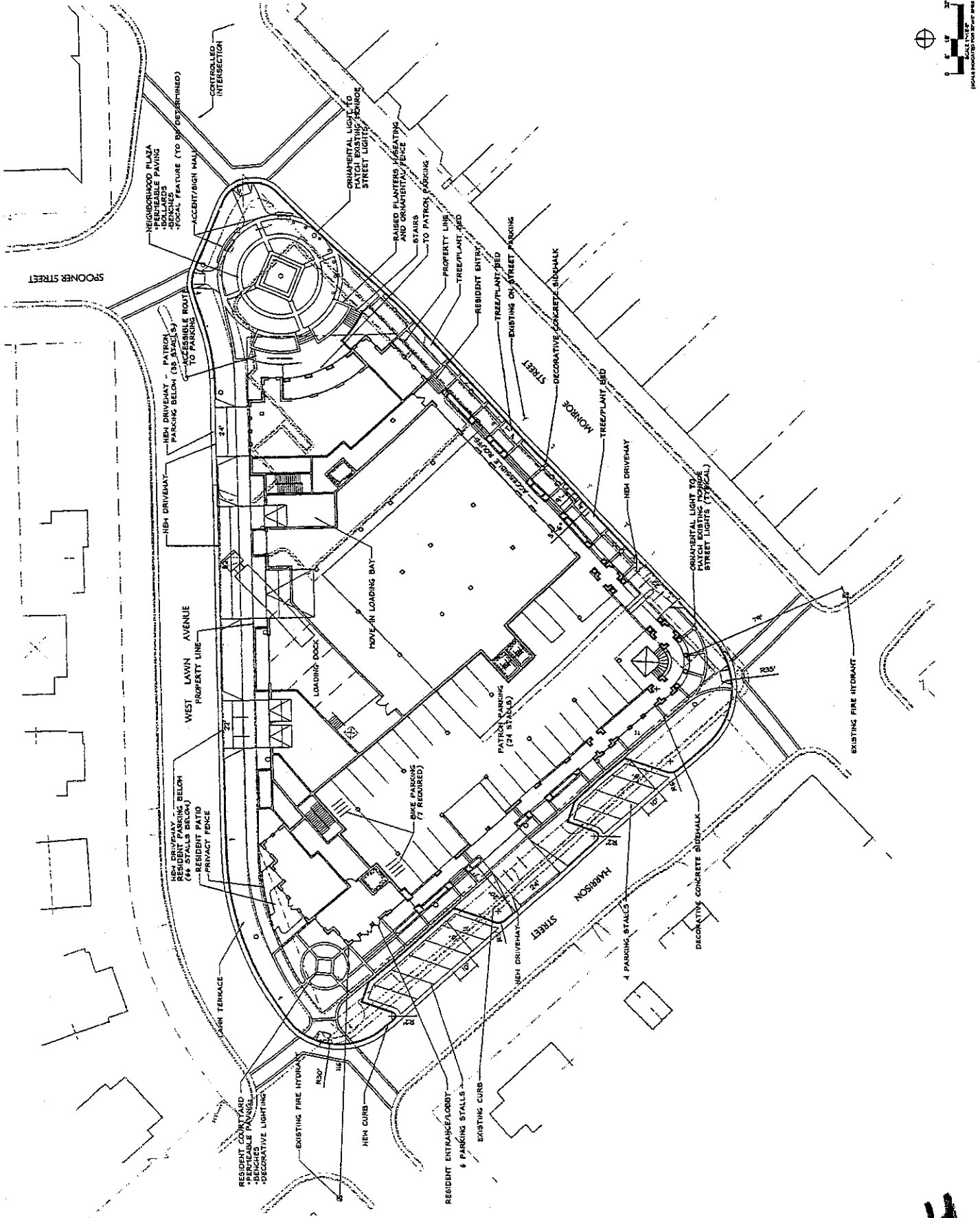
BILL GROSS
 PROJECT NAME: 1864 MONROE
 DATE: OCTOBER 27TH, 2008
 SHEET NUMBER: 27

C200



NOTE:
 1. 12" TRENCH DRAIN, 48" DIA. R-4994 LD
 1864 MONROE AVENUE, MEYHAW, WI 53924
 PROJECT NO. 08-000





EPPSTEIN UHLEN
 ARCHITECTS
 1000 W. WISCONSIN AVENUE
 SUITE 1000
 MADISON, WISCONSIN 53703
 TEL: 608.261.1111
 FAX: 608.261.1112
 WWW.EPPSTEINUHL.COM

MONROE COMMONS

SAA
 SURVEILLANCE
 ARCHITECTS

MONROE COMMONS
 1864 MONROE STREET
 MADISON, WISCONSIN

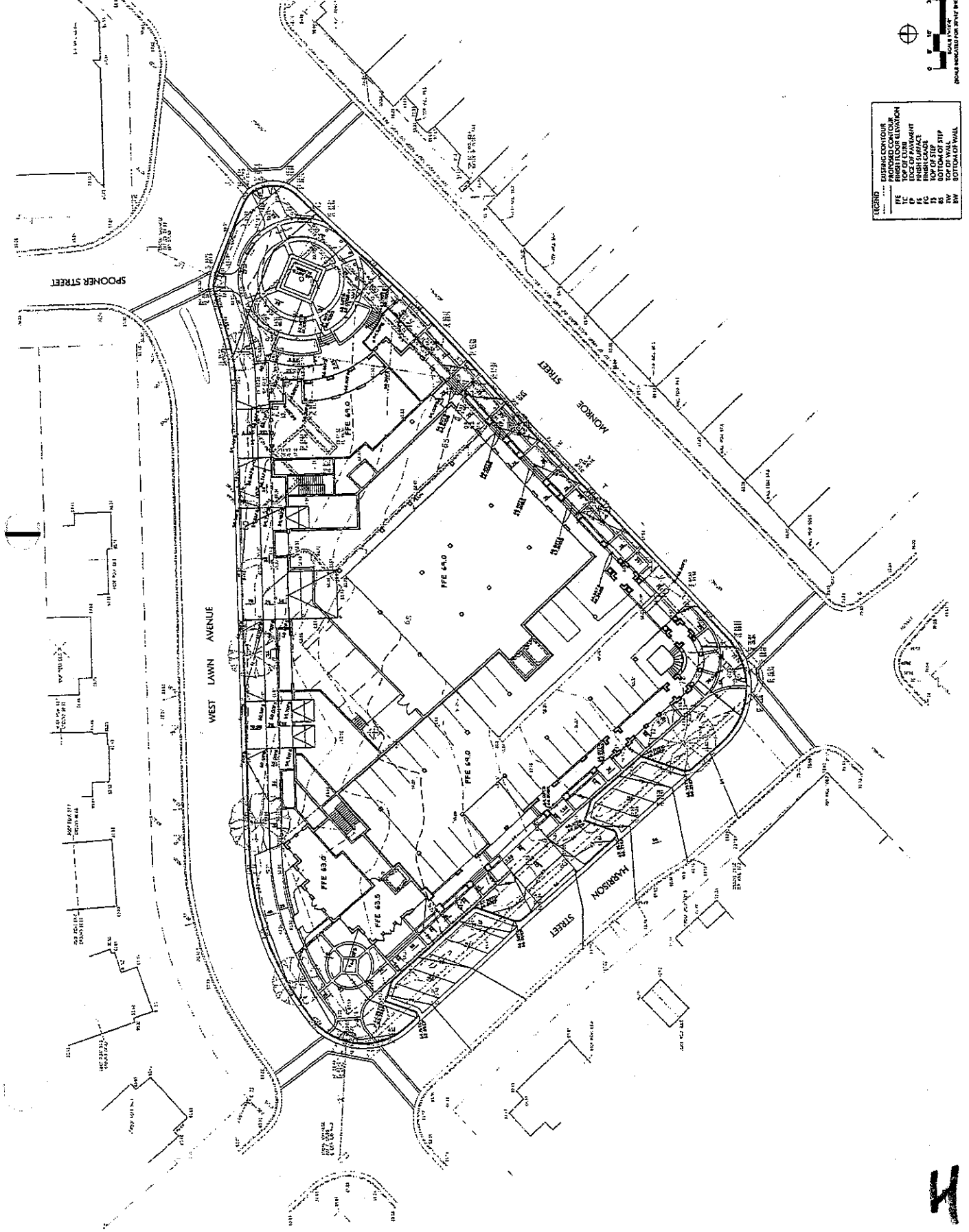
PROGRESS DOCUMENTS
 This drawing is a progress document and is not to be used for construction. It is for informational purposes only. It is not to be used for construction. It is for informational purposes only. It is not to be used for construction. It is for informational purposes only.

PAID G.P. SUBMITTAL

GRADING PLAN

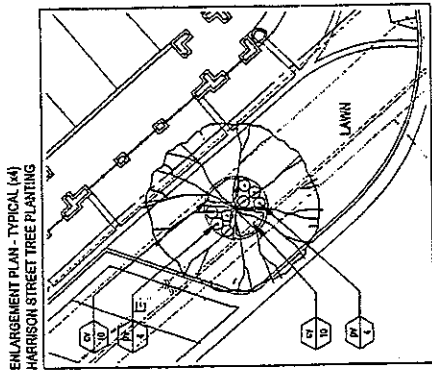
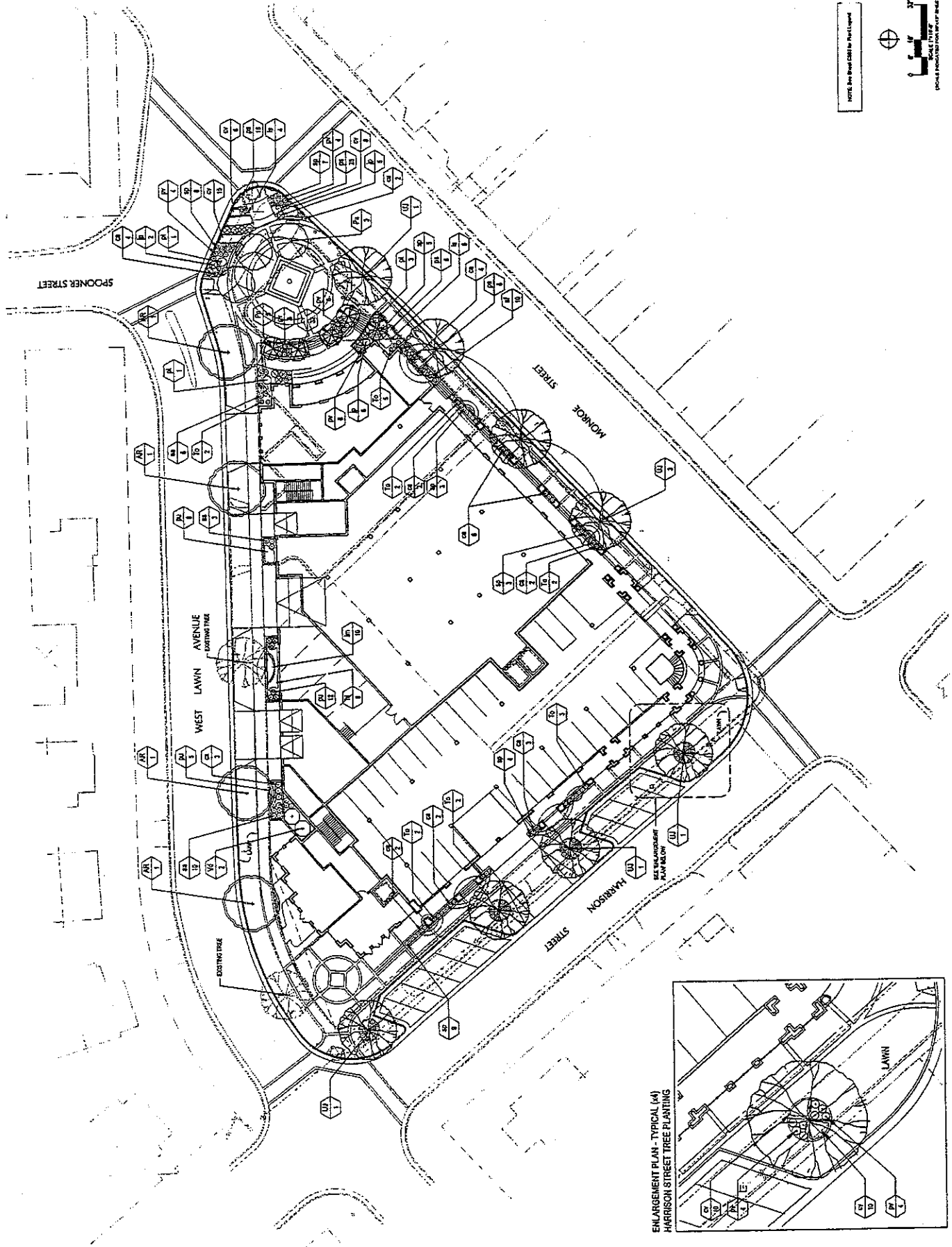
APPROVAL	DATE	BY
DESIGNED	DATE	BY
CHECKED	DATE	BY
PROJECT MANAGER	BILL RUSK	
DATE	OCTOBER 27TH, 2004	
REVISION		

C400



H

NOTE: See Sheet C400 for Part I Legend



ENLARGEMENT PLAN - TYPICAL (4)
HARRISON STREET TREE PLANTING

EPSTEIN UHREN
 ARCHITECTS
 234 EAST CHURCH STREET
 MILWAUKEE, WI 53202
 TEL: 414.224.1111 FAX: 414.224.1112
 WWW.EPSTEINUHREN.COM

MONROE COMMONS

SAA
 ASSOCIATES PC
 1000 W. WISCONSIN AVENUE
 MILWAUKEE, WI 53233

PROJECT
MONROE COMMONS
 1864 MONROE STREET
 WAUKESHA, WISCONSIN

PROGRESS DOCUMENTS
 These drawings have been prepared and checked by the architect and are intended to be used for construction purposes only. They are not to be used for any other purpose without the written consent of the architect.

DATE _____ **DESCRIPTION** _____

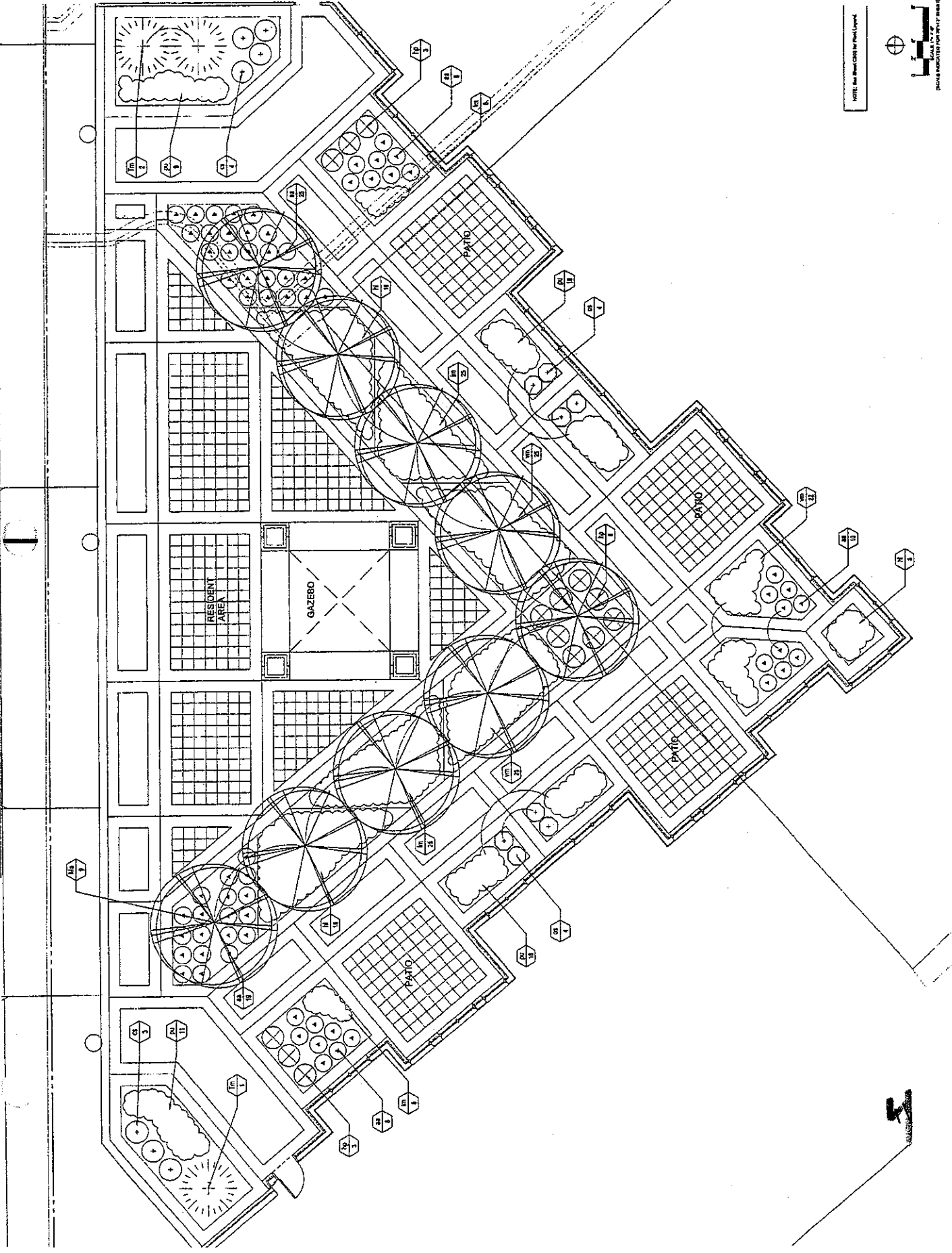
PLO GOP SIP SUBMITTAL
 DRAWING

SHEET TITLE
ROOF GARDEN PLAN

APPROVAL	DATE
DESIGNER	DATE
CHECKER	DATE
PROJECT MANAGER	DATE
CLIENT MANAGER	DATE
DATE	DATE
REVISIONS	DATE

C501

NOTE: See Blueprints for Field Layout





PROJECT
MONROE COMMONS
 184 MONROE STREET
 MILWAUKEE, WISCONSIN

PROGRESS DOCUMENTS
 This document is a work in progress. It is subject to change without notice. It is not to be used for construction purposes.
 DATE: 10/06/17
 CORE: COMPLETE

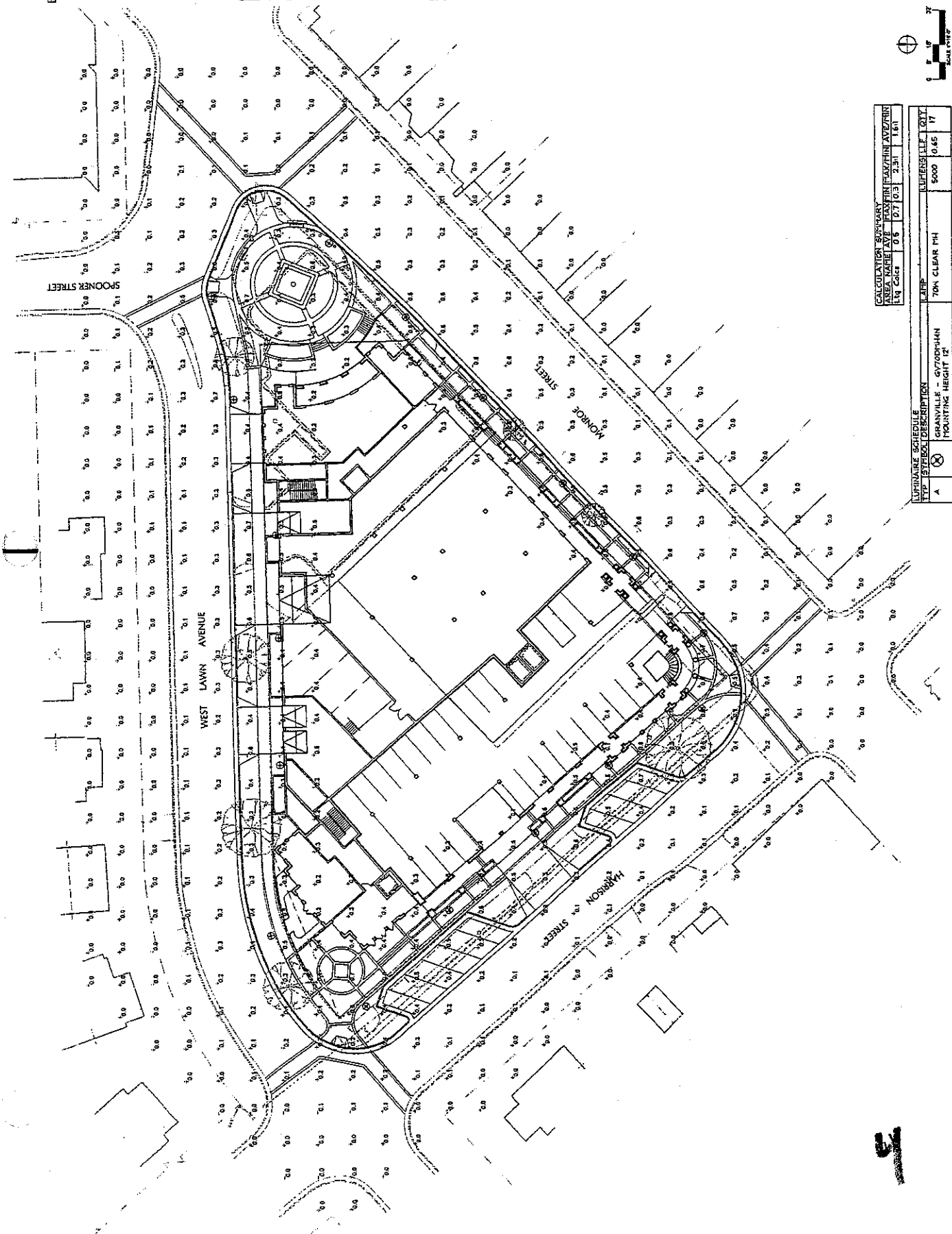
PLD GIP SIP SUBMITTAL
 RELEASE

SEE THE
LIGHTING PLAN

DESIGNER	DATE
PROJECT NUMBER	PROJECT NAME
DATE	SCALE

BLISS
 1415148
 OCTOBER 17TH 2017
 1/8" = 1'-0"

C600



CALCULATION SUMMARY			
AREA	MAX	AVERAGE	MIN
AREA	1.0	0.5	0.3
AVG	0.6	0.7	0.3
MIN	0.3	0.3	0.1

LUMINAIRE SCHEDULE		LUMENS PER FOOT	
TYPE	DESCRIPTION	TYPE	FOOT
A	GRANVILLE - 6700MHAN	5000	0.45
	FOOTCANDLE HEIGHT 12'		17

70% CLEAR MH

3



MONROE COMMONS
1864 MONROE STREET
MADISON, WISCONSIN

PROGRESS DOCUMENTS
DATE: 10/27/2010
SUBMITTED TO: CITY OF MADISON
PROJECT: MONROE COMMONS
SHEET: 33

PUD GOP SIP SUBMITTAL
DATE: 10/27/2010

APPROVAL
DATE: 10/27/2010
PROJECT NUMBER: 10101541
DATE: OCTOBER 27, 2010
SHEET NUMBER: A100

SITE DATA

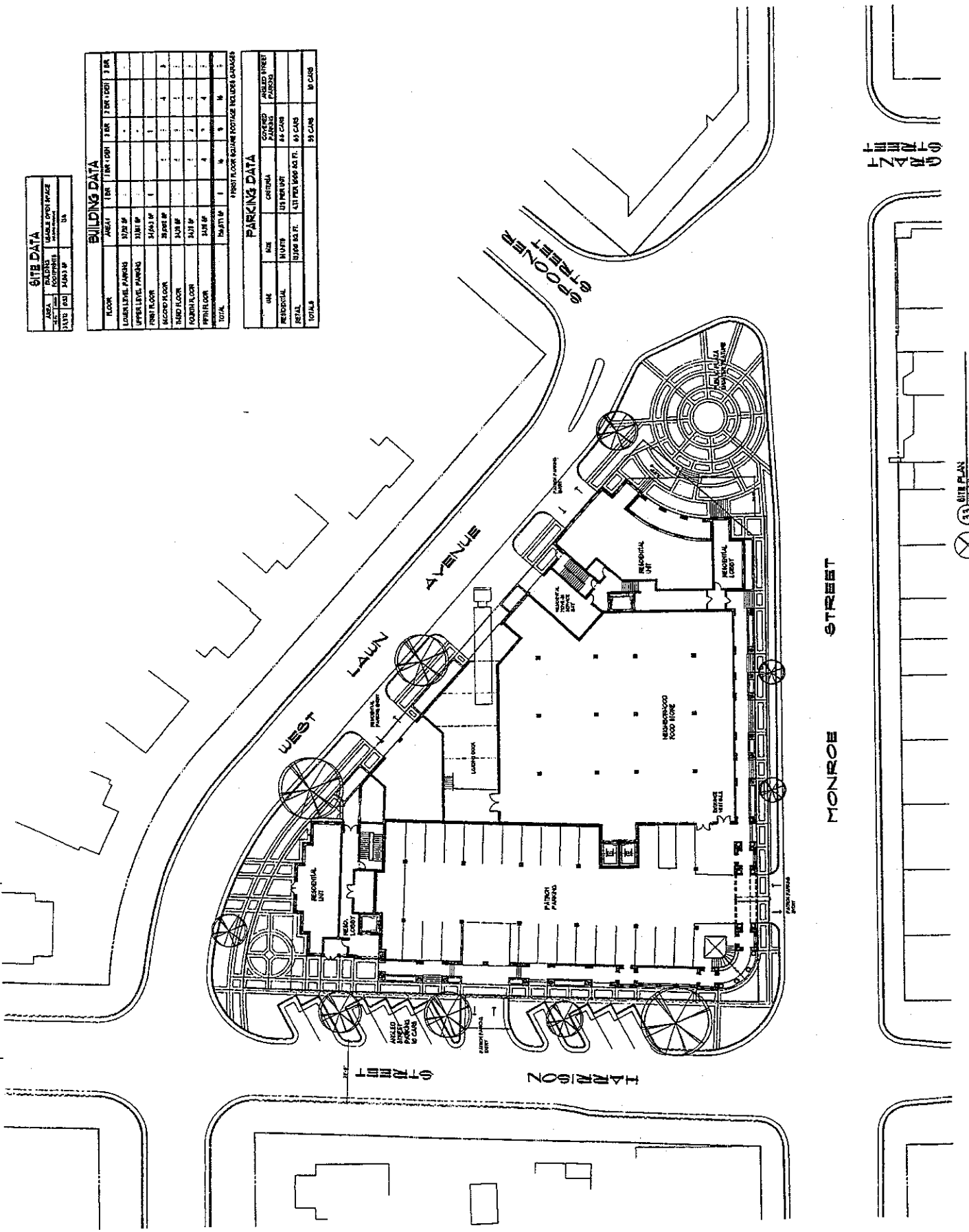
AREA	DATE	SCALE	OPEN SPACE
1000	10/27/10	1" = 100'	10%

BUILDING DATA

FLOOR	AREA	1 BR	2 BR	3 BR	4 BR
LOWER LEVEL PARKING	1720 SF	-	-	-	-
UPPER LEVEL PARKING	1341 SF	-	-	-	-
FIRST FLOOR	1461 SF	1	1	1	1
SECOND FLOOR	2428 SF	2	2	2	2
THIRD FLOOR	2428 SF	2	2	2	2
FOURTH FLOOR	2428 SF	2	2	2	2
FIFTH FLOOR	2428 SF	2	2	2	2
TOTAL	10766 SF	10	10	10	10

PARKING DATA

TYPE	SIZE	CRITERIA	REQUIRED PARKING	PROPOSED PARKING
RESIDENTIAL	1000 SQ. FT.	1.5 PER 1000 SQ. FT.	15 CARS	15 CARS
RETAIL	1000 SQ. FT.	1.5 PER 1000 SQ. FT.	15 CARS	15 CARS
TOTALS			30 CARS	30 CARS



33 SITE PLAN

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AGENDA # _____

Copy Mailed to Alderpersons _____

CITY OF MADISON, WISCONSIN

AN ORDINANCE _____

creating Section 28.06(2)(a)3028 of the Madison General Ordinances rezoning property from **C1 Limited Commercial District and R2 Single-Family Residence District to PUD(GDP) Planned Unit Development (General Development Plan) District, and creating Section 28.06(2)(a)3029** of the Madison General Ordinances rezoning property from **PUD(GDP) Planned Unit Development (General Development Plan) District to PUD(SIP) Planned Unit Development (Specific Implementation Plan) District.**

Proposed Use: Demolish Commercial Buildings and Build 5-Story Mixed-Use Building with 12,000 Square Feet Commercial Space and 51 Condominium Units

10th Ald. Dist.
1802-1864 Monroe Street

Drafted by: Katherine C. Noonan
Assistant City Attorney

Date: November 2, 2004

Fiscal Note: No expenditure required.

SPONSORS: Common Council (By Petition)

PRESENTED December 14, 2004
REFERRED Plan Commission;
Zoning Administration
REREFERRED _____

REPORTED BACK _____

ADOPTED _____ POF _____
RULES SUSP. _____ TABLED _____
PUBLIC HEARING P.C. 1/24/05
C.C. 2/1/05

MAYOR SIGNED _____
PUBLISHED _____

APPROVAL OF FISCAL NOTE IS NEEDED
BY THE COMPTROLLER'S OFFICE
Approved By _____
Comptroller's Office

ORDINANCE NUMBER _____
ID NUMBER _____

1. WHEREAS, a PUD(GDP) Planned Unit Development (General Development Plan) District has been duly filed for approval of the Madison Common Council and is hereby made an integral component of the zoning district regulations.

NOW, THEREFORE, the Common Council of the City of Madison do ordain as follows:

Paragraph 3028. of Subdivision (a) of Subsection (2) of Section 28.06 of the Madison General Ordinances is hereby created to read as follows:

"28.06(2)(a) 3028. The following described property is hereby omitted from the C1 Limited Commercial District and R2 Single-Family Residence District and added to the PUD(GDP) Planned Unit Development (General Development Plan) District:

Approved as to form:

/s/
Michael P. May, City Attorney



All of Block 27, Plat of West Lawn, and All of Block 1, Evergreen Park Subdivision, City of Madison, Dane County, Wisconsin. This parcel contains approximately 40,028 square feet (0.92 acres)."

2. WHEREAS, a PUD(SIP) Planned Unit Development (Specific Implementation Plan) District has been duly filed for approval of the Madison Common Council and is hereby made an integral component of the zoning district regulations.

NOW, THEREFORE, the Common Council of the City of Madison do ordain as follows:

Paragraph 3029. of Subdivision (a) of Subsection (2) of Section 28.06 of the Madison General Ordinances is hereby created to read as follows:

*28.06(2)(a)3029. The following described property is hereby omitted from the PUD(GDP) Planned Unit Development (General Development Plan) District and added to the PUD(SIP) Planned Unit Development (Specific Implementation Plan) District.

All of Block 27, Plat of West Lawn, and All of Block 1, Evergreen Park Subdivision, City of Madison, Dane County, Wisconsin. This parcel contains approximately 40,028 square feet (0.92 acres)."

PC

From: "Tom Hirsch" <thirsch@chorus.net>
To: "Nan Fey" <nanfey@earthlink.net>, "Brenda Konkel" <brendakonkel@yahoo.com>
Date: 1/24/2005 10:04:13 AM
Subject: Monroe St Redevelopment

For the Plan Commission consideration, 24 January:

1. The purpose of public involvement is to provide a grocery store; the two operators are not equal in my opinion. Unless the Willy Street Coop is included, this redevelopment should not go forward.

I have not seen the "but for" calculation but offer my personal comments regarding the methodology used:

2. The City parking aspect should not be a drain on TIF funds; it should provide its own revenues as required, using other Parking Utility revenues if necessary.

3. Affordable Housing should be provided with TIF at the same rate as the commercial area (e.g., \$ per SF) and, in addition, receive the 10% set aside. My rationale is that in a multi-use proposal the residential portion is as integral a part as the commercial.

4. Reducing the number of affordable units on site is preferable for the neighborhood to providing a larger number remotely.

Thomas Hirsch, AIA
Hirsch Group, LLC
Tel: 608-233-7797
Cell: 608-332-7797
Fax: 608-231-3533

Outgoing mail is certified Virus Free.
Checked by AVG anti-virus system (<http://www.grisoft.com>).
Version: 6.0.813 / Virus Database: 553 - Release Date: 12/13/2004

CC: "Dave Keller" <david@kellerrealestategroup.com>, "Mark Olinger" <molinger@ci.madison.wi.us>, "Brad Murphy" <bmurphy@ci.madison.wi.us>, "Ken Golden" <district10@council.ci.madison.wi.us>, "Robbie Weber" <district5@council.ci.madison.wi.us>, "Hickory Hurie" <hhurie@ci.madison.wi.us>, "Jeanne Hoffman" <jhoffman@ci.madison.wi.us>

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