

Michael Verveer
Alderman, 4th District
614 West Doty Street #407
Madison, WI 53703

October 29, 2004

Sheridan Glen
President
Capitol Neighborhoods, Inc.
614 West Doty Street #402
Madison, WI 53703

RE: CAPITOL WEST (BLOCK 51)

Gentlemen,

Please let this letter serve as notice that the Alexander Company intends to submit an application for PUD-SIP for the first Phase of Capitol West at Block 51 in the near future. Our understanding is that we must provide notice to you 30 days or more in advance of filing the noted application. We intend to file the application for the SIP during the first week of December.

I have attached a current site plan for your reference. I believe you will be copied on the application and notified of all coming public hearings with respect to the PUD by the City as well.

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

Sincerely,

THE ALEXANDER COMPANY, INC.

Thomas Miller
Development Project Manager
Senior Architectural Designer

Cc: Pete Ostlind, Bassett District Chair
533 W. Main St. #302
Madison, WI 53703

Natalie Bock, The Alexander Company

Mr. Brad Murphy
City of Madison
Planning & Development
215 Martin Luther King Jr. Blvd
Madison, WI, 53701

March 23, 2005

VIA Hand Delivery

**RE: CAPITOL WEST – BLOCK 51
Phase 1 Specific Implementation Plan: PUD/SIP Application**

Dear Mr. Murphy,

Attached please find our application for the PUD-SIP for the first phase of the Capitol West Development. We submit this SIP as the next step in the rezoning process after the approval of our GDP for this development last December. This Specific Implementation Plan includes the following components of the Capitol West GDP:

- 306 West Washington Avenue – Mixed-use residential and retail building
- The Capitol Court Townhomes – Two 5-unit buildings
- The Washington Rowhouses – One 3-unit and one 2-unit building
- The Main Street Townhomes – Five duplexes
- Parking Ramp – 137-149 stalls on two levels
- Associated Site Improvements

This Specific Implementation Plan also includes the ongoing operation of the following listed existing structures along with site improvements identified on the site and landscape plans. These buildings include:

- 345 Washington Avenue – Existing Commercial Office Building
- 180 Washington Row – Existing 500 stall Parking Facility

Additionally, as part of this application we would like to amend the GDP to include the Broom Street Lofts at this time. To that end we have included information regarding our current proposal at this area, and have amended all included documents to reflect our current proposal for this parcel, which is a 22 unit building of 4-stories plus a mezzanine situated 12' from the Broom Street right-of-way.

In order to process this application, the following documents have been included for your review:

- 1 Application and Notification Fee Check
- 1 Land Use Application Form
- 7 Copies of the following 24"x36" documents
 - Master Plan showing complete build-out
 - Master Plan showing Phase 1 build-out
 - Survey
 - Site Layout Plans – Phase 1
 - Grading and Drainage Plans – Phase 1
 - Utility Plans – Phase 1
 - Landscape Plans – Phase 1
 - Site Electrical Plans – Phase 1
- 12 Copies of the following documents:
 - PUD-SIP Letter of intent
 - Zoning Text
 - Inclusionary Dwelling Unit Plan – Phase 1
 - Inclusionary Dwelling Unit Application Form – Phase 1
 - Letter of Notification
 - Transportation Demand Management Plan
 - Recycling and Reuse Plan
 - 309 West Washington Plans, Elevations and Renderings
 - Capitol Court Plans, Elevations and Rendering
 - Main Street Townhomes Plans, Elevations and Rendering
 - Parking Ramp Plans
 - 11"x17" copies of the 24" x 36" site improvement plans listed above

Thank you for your consideration of this application; please let me know if you require any additional information.

Sincerely,

THE ALEXANDER COMPANY, Inc.
Thomas Miller

Development Project Manger

Cc: William White Michael, Best & Friedrich
Natalie Bock, The Alexander Company

March 23, 2005

Mr. Brad Murphy
City of Madison
Planning & Development
215 Martin Luther King Jr. Blvd
PO Box 2985
Madison, WI 53701-24985

Re: Letter of Intent, Capitol West (Phase I), PUD - SIP

Dear Mr. Murphy:

The following is submitted together with plans; application and zoning text for City Staff, Plan Commission, and City Council consideration of approval of the proposed development.

Project: Capitol West – Phase I
Block 51, bounded by West Washington Avenue, South Henry Street, West Main Street and Broom Street

Developer: The Alexander Company
145 East Badger Road, Suite 200
Madison, WI 53713
Office: (608) 258-5580
Fax: (608) 258-5599
Contact: Thomas Miller

Architects:

Urban Resources
Thomas Miller
145 East Badger Road
Madison, WI 53713
(608) 258-5580

KEE Architects
Doug Kozel
301 South Bedford Street, Suite 7
Madison, WI 53703
(608) 255-9202

Miller/Hull
David Miller
Polson Building
71 Columbia - Sixth Floor
Seattle, Washington 98104
(206) 682-5692

Vetter/Denk
John Vetter
614 North Broadway
Milwaukee, WI 53202
(414) 223-3388

Engineers:

Arnold and O'Sheridan
Mike Schmidt
815 Forward Drive
Madison, WI 53711
(608) 821-8500

CGC
Bill Weulner
3011 Perry St.
Madison, WI 53713
(608) 288-4100

Surveyor:

Williamson Surveying Company
Ron Williamson
104 A West Main Street
Waunakee, WI 53597
(608) 255-2705

Contractor:

J.H. Findorff & Son Inc.
300 S. Bedford St.
Madison, WI 53703
Phone: (608) 257-5321

Consultants:

*Madison Environmental
Group*
Sonya Newenhouse, Ph. D
25 North Pinckney Street
Suite 310
Madison, WI 53703
(608) 280-0800

Ayers Associates
Scott Wilson
1802 Pankratz Street
Madison, WI 53704
(608) 443-1250

Project Description:

The Alexander Company proposes to redevelop Block 51, which is bound by West Washington Av., South Henry Street, West Main Street and South Broom Street. The mixed-use development know as **Capitol West**, will be phased and consists of owner occupied residential, neighborhood retail, commercial office, and parking to support those uses. Upon completion the development will consist of approximately 400 owner occupied flats, lofts, condominiums and town homes including units being affordable to families making 80% of the Area Median Income, 18,000 square feet of retail, and up to 105,000 square feet of office space and parking.

In addition to four (4) proposed residential and mixed-use buildings at 309 W. Washington Avenue, 333 W. Washington Avenue, 306 W. Main Street, and at Broom Street the project includes three (3) townhome components – Courtyard Townhomes, Main Street Townhomes and Washington Rowhouses as well as the acquisition and potential expansion of an office building at 345 W. Washington Avenue, the acquisition of ± 300 parking spaces in the existing parking structure on Main Street, and the acquisition and revitalization of 2.23 acres of underutilized buildings, asbestos abatement and selective demolition of the vacant structures.

Neighborhood retail is proposed in three locations at the corner of West Washington Ave., and South Henry Street, at the corner of West Washington and West Washington Row, and possibly at the corner of West Main and South Henry Street.

Bicycle parking will be provided at grade for retail uses and for visitors to each component of the development. In addition one (1) bike stall per bedroom will be included within the proposed parking structure.

Streetscape Improvements to be coordinated with the city, as part of the future SIP for each component, will include adding street trees at select locations shown on the landscape plan.

Site development includes Washington Row, which will offer live/work residential units, at grade parking for retail uses, access to below grade parking and to services such as mechanical rooms and trash collection areas. Site work also includes Capitol Mews and associated landscaping for the courtyard. Please refer to this Social and Economic Benefit of this letter for more specifics regarding open space.

Capitol Mews provides pedestrian access to the common areas of the development from each component. In addition the mews and courtyard provide an opportunity for newly designed usable urban open spaces for uses by residents and guests passing through the site. The mews and court is accessed from Henry St., Broom St., and Washington Row.

The Project will be phased in three distinct Phases. This SIP Application is for Phase I, the scope of which is defined below. Future Phases will be defined by future SIP applications.

Fire Access

A fire access plan has been submitted as part of the approved GDP for this development. This plan meets the criteria outlined in the Fire Apparatus & Access and Fire Hydrant Worksheet. The Madison Fire Department has reviewed this Plan. It is important to note that fire protection systems (i.e. sprinklers) will be provided throughout each of the buildings in the development.

Project Phases

The project will be developed in three phases. This SIP application is for Phase I of the development, which includes the components outlined below.

Phase I

- 309 West Washington Avenue
- Courtyard Townhomes North at Capitol Mews
- Courtyard Townhomes South at Capitol Mews
- Washington Rowhouses
- Below Grade Parking Structure
- Main Street Condominiums
- Site Improvements and Landscaping
 - Washington Row
 - Capitol Mews from South Henry to Washington Row
- Existing ±500 stall parking ramp to remain
- Existing Commercial Office Building at 345 W. Washington to remain

Components to be completed in later phases are not included in this application. SIP applications will be submitted separated for the following components

- Broom Street Lofts
- 306 West Main Street
- 333 West Washington Avenue

- Potential Expansion of Commercial Office Building
- Additional Site Improvements and Landscaping
 - Capitol Mews from Washington Row to Broom Street

*Please note that as part of this application we would like to amend the current GDP to include the Broom St. Lofts as indicated on the attached Site Plan.

Site Planning & Building Architecture:

See the attached site plan, landscape plan for the proposed general planning approach and massing. Architectural design of each component in Phase I has been submitted with the Letter of Intent.

Phase I Site Development Statistics:

General

Lot Area: 4.46 Acres
 Dwelling Units: up to 159 units (this includes Broom St. Townhomes)
 Overall Density: up to 90 DU/Acre (see each component for specific density statistics)
 Building Heights: 3 - 10 stories

Use

Gross Area

Existing Commercial 82,520 Sq. Ft. (expandable to ±105,000)
 Existing Parking to remain ± 692 stalls
 New Retail 18,000 Sq. Ft.
 New Parking up to 171 stalls (149 interior/22 surface)
 New Residential 513,300 Sq. Ft.

Dwelling Unit Mix

	<u>No. of Market Units</u>	<u>No. of Affordable</u>	<u>Total Units</u>
One Bedrooms	65	7	72
Two Bedrooms	68	5	73
<u>Three Bedrooms</u>	<u>12</u>	<u>2</u>	<u>14</u>
Total	145	14	159*

* Includes Broom Street Lofts (22 units)

Phase I Parking

The approach to parking to be provided as part of this SIP is outlined below. The total amount of parking includes existing parking on-site below 345 W. Washington and in the Existing Parking Ramp (180 Washington Row), plus additional parking for new retail (3.5 stalls/1000 gsf) and new residential (approximately 1.3 stalls per Mkt DU & 1 stall per 1Z DU).

Existing Parking Residential	330
Existing Parking - Meriter	170
345 W Washington	192
Subsurface Parking (New)	135 - 147
<u>Washington Row (New)</u>	<u>22</u>
Total	849 - 861

Phase I Project Component Outline

309 W. Washington Ave

(Retail/Residential)

Ten Story Bldg: 146,773 GSF

Seven Story Bldg: 31,476 GSF

Up to 112 Condominium Units*

152,100 GSF (Residential)

12,600 GSF (Retail)

18,900 GSF (Storage)

183,600 GSF (Total)

Site Area: ± 1.75 ac

Density: ± 70 DU/ac

309 W. Wash Ave Unit Mix

One Bedroom 56 MKT 6 IZ

Two Bedroom 32 MKT 4 IZ

Three Bedroom 12 MKT 2 IZ

Total 100 Units + 12 Units = 112

* assumes execution of the 7th floor alternate on the Henry Street Addition

Capital Court Townhomes:

South Townhomes

GRSF 8,746

Dimensions 17.5' x 35' per unit

Stories 3

Units 5

Site Area: ± 0.25 ac

Density: ± 20 DU/ac

South Townhomes Unit Mix

Two Bedroom 5 MKT

Total 5 Units

North Townhomes

GRSF 8,746

Dimension 17.5' x 35' per unit

Stories 3

Units 5

Site Area: ± 0.25 ac

Density: ± 20 DU/ac

North Townhomes Unit Mix

Two Bedroom 5 MKT

Total 5 Units

Washington Rowhouses

GRSF 9,205

Dimension 20' x 26' per unit

Stories 4

Units 5

Site Area: ± .1 ac

Density: ± 50 DU/ac

Washington Rowhouses Unit Mix

Two Bedroom 5 MKT

Total 5 Units

Additional Townhomes:

Main Street Townhomes

GRSF 16,200

Stories 3-4

Units 10

Site Area: ± 0.15 ac

Density: ± 75 DU/ac

Main Street Unit Mix

Two Bedroom 10 MKT

Total 10 Units

<u>Broom Street Lofts</u>		<u>Broom Street Unit Mix</u>		
GRSF	30,400	One Bedroom	9 MKT	1 IZ
Stories	4 + mezzanine	<u>Two Bedroom</u>	<u>11 MKT</u>	<u>1 IZ</u>
Units	22	Total	20 Units	2 Units = 22
Site Area:	± 0.32 ac			
Density:	± 75 DU/ac			

NOTE: THIS APPLICATION REQUESTS THE AMENDMENT OF THE GDP TO INCLUDE THE BROOM STREET LOFTS

345 W. Washington (Commercial)
82,520 Existing GSF

Project Schedule and Management

The Construction of Phase I is expected to begin July 2005 with a completion date of 309 W. by December 2006.

Phase II would be expected to begin construction of 306 W. Main, 146 units, May 2007 and be completed one year later in 2008.

Phase III would be expected to begin construction of 333 W Washington, 84 units, May 2009 and be completed by June 2010.

The inclusionary units will be distributed throughout each phase of the project with the exception of the townhouse units (Capitol Court, Washington Rowhouses & Main Street Townhomes) where waivers have been registered.

Social Economic Impact

The Capitol West development will provide a positive impact for downtown Madison both socially and economically. The mixed-use plan, by developing housing units and supporting retail uses in our city's center promotes smart growth by placing density where sufficient city services currently exist. By creating a range of housing choices within walkable distance from a variety of supporting retail services and workplaces, we are promoting healthy development.

The Capitol West development provides a significant component of affordable housing. Our current plan for Phase I calls for creation of affordable housing as set forth in the attached Inclusionary Zoning Dwelling Unit Plan. Affordable Housing will be targeted to residents making 80% of the Area Median Income or less.

Also, it is important to note that the design and construction of the buildings within the development will promote opportunities for healthy living and green building systems. The design of the master plan focuses on maximum solar exposure and prevailing breezes for the dwelling units increasing residents' access to sunlight and natural ventilation. The inclusion of a Recycling and Re-use Plan will maximize the amount of material re-used and minimize the amount of waste generated by this development. The enclosed transportation Demand Management Plan will insure the exploration of expanding transportation options and creating a streetscape that better serves a range of users -- pedestrians, bicyclists, transit riders, and automobiles. And, the potential for rain catchment and other green building systems will reduce the amount of runoff and demand for water supply resulting from this development. This along with the remediation of hazardous materials currently existing on the site and the utilization of

environmentally sensitive building materials creates a social benefit for the residents, the neighbors and the City, and exemplifies a commitment to responsible and environmentally sound development.

Based on the analysis above we feel the proposed development meets the spirit and intent of the PUD zoning ordinances when reviewed with respect to the criteria for approval set fourth in Section 28.07(6)(f) of the zoning code:

1. Criteria & Intensity of Land Use: The proposed PUD has been designed specifically with the existing neighborhood uses in mind. More intense uses have been located along streets and avenues that can support higher density development, while less intense uses are planned where the existing finer grain, less massive historic residential uses are adjacent to the proposed development, i.e. Broom Street & Main Street. Great lengths have been taken to design an aesthetically pleasing urban environment with a mix of uses designed to promote a sustainable urban community without adversely affecting municipal services. As noted above a transportation demand management plan and traffic impact analysis have been completed as part of the PUD and will help provide solutions to any traffic and parking demand concerns.
2. Economic Impact: We feel the proposed development will provide a positive impact on the economics of the city without adversely affecting the provision of municipal services. The projected increase in value of the property upon completion is in excess of \$100 million.
3. Presentation & Maintenance of Open Space: This development includes a block wide approach to providing functional urban open space of the highest quality. The efforts to create seating areas, walkways, water features, plazas, roof gardens, terraces, additional bike lanes, and bike parking areas will provide a more attractive network of useable open space than currently exists on site. Plantings existing in the transit corridor along the western edge of the block have reached their peak effectiveness in relation to their original single purpose: screening. The loss of branches due to age and overcrowding of a single species is producing diminishing returns. A broader look at the entire block allows us to provide plantings & open space that will more effectively address a variety of needs and uses both for wildlife and residents. In addition, this development will provide plantings that take into account rain interception, air filtration, shade and cooling, as well as more appropriate habitat and nutrition for wildlife than what currently exists on the site.
4. Implementation of Schedule: the schedule provides for phasing that promotes expedient construction of each phase of the development and limits any adverse effect on the community should the development terminate an the end of any given phase.

Thank you for your time in reviewing this proposal.

Regards,

Thomas C. Miller
Development Project Manager

TCM/jb

March 23, 2005

Mr. Brad Murphy
City of Madison
Planning & Development
215 Martin Luther King Jr. Blvd
Madison, WI 53701-24985

Mr. Hickory R. Hurie,
City of Madison CDBG Office
Room 280, Madison Municipal Building
215 Martin Luther King, Jr. Boulevard
Madison, Wisconsin 53701-2985

Re: Inclusionary Dwelling Unit Plan

Gentlemen:

The following is submitted together with plans, SIP Application and Zoning Text for City Staff, Plan Commission and City Council consideration of approval of the proposed development.

Project: Capitol West – Phase I
Block 51, Madison, WI

Developer: The Alexander Company
145 East Badger Road, Suite 200
Madison, WI 53713
Office: (608) 258-5580
Fax: (608) 258-5599
Contact: Thomas Miller

Project Overview

Block 51 is bound by West Washington Ave., South Henry Street, West Main Street and South Broom Street. The mixed-use development know as **Capitol West**, will be phased and consists of owner occupied residential, neighborhood retail and commercial office, and parking to support those uses. Upon completion the development will consist of up to 400 owner occupied condominiums and town homes with a number of those units being affordable to families making 80% of the Area Median Income, 18,000 – 20,000 square feet of retail, up to 105,000 square feet of office space, and parking. This IZ Dwelling Unit Plan is for Phase I of this development which includes the above-mentioned retail, commercial and up to 159 residential dwelling units. Please note that the 159 units identified above includes 22 units at the Broom Street Lofts. As part of our current Land Use Application we have requested that the Broom Street Townhome Component be included as proposed in the GDP. As such, we have included these units in the IZ Dwelling Unit Plan.

The project will be developed in three phases: refer to the PUD/GDP for a specific description of each phase.

The 159 dwelling units included in Capitol West Phase I indicate a required 24 affordable units under the Inclusionary Zoning Ordinance. The inclusionary zoning units make the transaction economically infeasible and therefore the applicant is requesting a waiver on 10 IZ units in exchange for making payment to the Affordable Housing Trust Fund. A payment would be made for the following inclusionary zoning dwelling units: (1) 4 dwelling units in the multi-level townhomes at Courtyard Townhomes, and Main Street, (2) 4 units at 309 W. Washington, and (3) 2 units at the Broom Street Lofts. As stated, this assumes that the Broom Lofts are completed as part of Phase I of Capitol West.

Project Schedule and Management

The Construction of Phase I is expected to begin July 2005 with a completion of 309 W. Washington (up to 112 units), and Courtyard Townhomes (15 units), by December 2006. The Broom Street Lofts, if included (22 units) and Main Street Townhomes (10 units) would have a construction start date of August 2005 and be completed in May 2006.

Phase II would be expected to begin with the construction of 306 W. Main (146 units) in December 2007 and be completed one year later in 2008.

Phase III would be expected to begin with the construction of 333 W Washington (84 units) in May 2009 and be completed by June 2010.

Inclusionary Units (Condominiums)

The general pricing of IZ units will be between \$109,100 - \$151,000. There will be 14 units in this first Phase of the project and 10 waivers. The waivers are requested for the IZ units at Capitol Court Townhomes, Washington Rowhouses and Main Street Townhomes and for 4 of the units at 309 W. Washington and 2 of the units at the Broom Street Lofts, the unit distribution is as follows:

- 7 1 Bedroom IZ Units
- 5 2 Bedroom IZ Units
- 2 3 Bedroom IZ Units
- 10 waivers including payment into the AHTF
- 24 Total IZ Units

The locations and floor plans for these units have been submitted with the SIP application. They will be distributed throughout the buildings. This unit tally, including the waiver, equals 15% of the project units and represents a mix similar to that of the entire project.

As noted we are requesting a waiver for the townhome components of the project – Main Street Townhomes and Capitol Court – as these units are multiple level condominiums and as such their layout and size prohibits them from considered IZ dwelling units and waivers for 6 additional units. This results in a waiver request of 10 IZ units.

Marketing

We plan to market our inclusionary zoning units in conjunction with our market rate units. A sales center including a wide variety of marketing tools and marketing materials will be based out of the corporate office of the Alexander Company at the Novation Technology Campus, 145 East Badger Road, Madison, WI. Additionally, we are investigating opportunities to partner with a local non-profit to specifically target moderate-income buyers that would qualify for the affordable units. With the local non-profit and several area lenders, we will package attractive loan options for potential buyers of affordable units as well.

Thank you for your time in reviewing this proposal.

Sincerely,

Thomas C. Miller
Development Project Manager

TCM/jb

**PROPOSED ZONING TEXT: PUD – SIP
CAPITOL WEST – PHASE I
BLOCK 51 MADISON, WI**

Legal Description: The lands subject to this planned unit development shall include those described in Exhibit A attached hereto.

A. **Statement of Purpose:** This Zoning District is established to allow for the construction of approximately 400 dwelling units, 18,000 gsf of retail, up to 105,000 gsf of commercial office (of which 82,520 is existing) and approximately 946 parking spaces (of which ±692 are existing). This development will be constructed in 7 distinct components and phased as identified below. Each of the components is described in detail in the attached Letter of Intent. Please note that this SIP application is submitted to finalize the zoning text for each Phase of the development identified below. Also note that this Specific Implementation Plan contemplates the ongoing maintenance of two existing structures (345 W. Washington Ave and the existing Parking Ramp with a new address of 180 Washington Row) at their current uses.

- **Components included in this SIP:**

Phase I

309 West Washington Avenue - Residential & Retail
Courtyard Townhomes North - Residential
Courtyard Townhomes South - Residential
Washington Rowhouses - Residential
Below Grade Parking Structure – To serve Residential, Retail & Neighborhood
Main Street Condominiums –Residential
Site Improvements and Landscaping
Washington Row
Capitol Mews from South Henry to Washington Row
Selected Streetscapes

- **Components to be included in future SIPs**

Phase I(continued)

Broom Street Condominiums - Residential

Phase II

306 West Main Street
Additional Site Improvements and Landscaping

Phase III

333 West Washington Avenue – Residential with structured parking
Potential Expansion of Commercial Office Building
Additional Site Improvements and Landscaping
Capitol Mews from Washington Row to Broom Street

B. **Permitted Uses:**

1. Those uses that are stated in the Residential, C-4 Commercial & Office Zoning Districts.
2. Uses accessory to permitted uses as listed above

3. Other uses listed herein and in attached Letter of Intent and in future SIP applications
4. Maintenance of existing buildings for current uses is permitted by this SIP
5. Maintenance of existing buildings on lots designated for future uses is permitted by this SIP.

- C. **Lot Area:** Refer to attached Letter of Intent for Lot Areas for each specific component of Phase I.
- D. **Floor Area Ratio:**
1. Floor area ratios will comply with the structures identified on the attached conceptual site/landscape plan. Specific floor area ratios will be submitted with the SIP application of each component of the proposed development.
 2. Maximum building height shall be limited by the Capitol View Preservation Limit as defined in Chapter 28.04(14)(b) of the Madison General Ordinances. The maximum number of stories shall be defined as shown on the attached Site Plan and as described in the drawings attached to the Letter of Intent.
- E. **Yard Area Requirements:** Yard areas will be provided as shown on the attached site plan and landscape plan.
- F. **Landscaping:** Site Landscaping will be provided as shown on the attached site and landscape plans.
- G. **Accessory Off-Street Parking & Lodging:** Accessory off street parking will be provided as described in the Letter of Intent and as shown on the site plan and architectural drawings of each component.
- H. **Lighting:** Site Lighting will be provided as shown on the attached lighting plan.
- I. **Signage:** Signage will be allowed as per Chapter 31 of the Madison General Ordinances, and as outlined in the future administrative amendments to existing SIPs for each phase of the proposed development as tenants are identified.
- J. **Family Definition:** The family definition of this PUD-GDP shall coincide with the definition given in chapter 28.03(2) of the Madison General Ordinances for the R-6 Zoning District.
- K. **Alterations and Revisions:** No alteration or revision to 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 alderperson of the district and are compatible with the concept approved by the City Plan Commission.

Note: Modifications from the GDP and this SIP will be addressed in future SIP applications for each Phase.



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 if 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. A schedule of meeting dates and required meeting materials (if any) is available online at www.cityofmadison.com.

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 certain 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 and rental prices won't be determined until the bedroom size is determined).

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 relocate 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.

PART 1 – DEVELOPMENT INFORMATION:

Project or Plat Capitol West (SIP) Phase I

Project Address: Block 51 Madison, WI **Project Area (in acres):** 4.46 acres

Developer: The Alexander Company Representative: Thomas Miller

Street Address: 145 E. Badger Road, Suite 200 City/State: Madison, WI Zip: 53713

Telephone: (608) 258-5580 Fax: (608) 258-5599 Email: tcm@alexandercompany.com

Agent, If Any: William F. White Company: Michael Best & Friedrich LLP

Street Address: One South Pinckney Street City/State: Madison, WI Zip: 53701

Telephone: (608) 283-2246 Fax: (608) 283-2275 Email: wfwhite@mbf-law.com

PART 2 – PROJECT CONTENTS:

Complete the following table as it pertains to this project:

Residential Use	MARKET-RATE UNITS		INCLUSIONARY UNITS		Total Units	Acres
	Owner-Occupied Units	Renter-Occupied Units	Owner-Occupied Units	Renter-Occupied Units		
Single-Family	0	0	0	0	0	0
Duplexes	0	0	0	0	0	0
Multi-Family	139 du	0	14 du	0	159 du	4.46 acres
TOTAL	139 du	0	14 du	0	159 du	4.46 acres

PART 3 – AFFORDABLE HOUSING DATA:

Number of Inclusionary Dwelling Units Proposed by Area Median Income (AMI) Level and Minimum Sale/Rent Price							
Owner-Occupied Units	30%	40%	50%	60%	70%	80%	Total
Number at Percent of AMI			0	0	0	14	14
Anticipated Sale Price			N/A	N/A	N/A	\$109,100-\$151,000	\$1,750,000
Rental Units	30%	40%	50%	60%	70%	80%	Total
Number at Percent of AMI	0	0	0	0			0
Maximum Monthly Rent Price	0	0	0	0			0

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:	N/A	70	56	13	N/A	N/A	7	5	2	N/A
Minimum Floor Area:	N/A	750	1,050	1,200	N/A	N/A	550	740	925	N/A
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 ten 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 checked="" 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 affordable 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 checked="" type="checkbox"/> Off-street Parking Reduction up to 25%	1		
<input type="checkbox"/> NO INCENTIVES ARE REQUESTED			
Other Incentives Not Assigned a Point Value by Ordinance (Explain)		Availability of RP3 Residential Parking Permits is Requested	
Density & Parking will be defined through PUD Process			
City financing and subsidy will be reviewed through TIF application Process.			

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 may be provided up to 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 your basis for the waiver in the project narrative.

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		

Standards for Inclusionary Dwelling Units (IDUs) [continued]	Will Comply	Will <u>not</u> 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		See attached Letter of Intent
Developer acknowledges need to inform buyers/renters of IDU status, responsibilities for notification.	X		
Terms of sale or rent.	X		
Developer has arranged to sell/rent IDUs to non-profit or CDA to meet IDU expectations.	X		Discussions ongoing with a local non-profit
Developer has requested waiver for off-site or cash payment.	X		Waiver requested for cash payment in lieu of large townhome units
Developer has requested waiver for reduction of number of units.	N/A		No Reduction Requested
Other:			

<ul style="list-style-type: none"> The applicant discussed this development proposal with representatives from the Planning Unit, Zoning Administrator and Community Development Block Grant Office on: → _____ The applicant presented a preliminary development plan for this project to the Interdepartmental Review Staff Team on: → _____ The applicant notified Alderperson Verveer of District 4 by mail of this development proposal on: → _____ The applicant also notified Sheridan Glen & Peter Ostlind of Capitol Neighborhoods, Inc. by mail on: → _____ The Inclusionary Dwelling Unit Plan Application package contains ALL of the materials required as noted on this form. I, as the undersigned, acknowledge that incomplete or incorrect submittals may cause delays in the review of this project. 	<p>March 17, 2005</p> <p>July 22, 2004</p> <p>October 29, 2004</p> <p>October 29, 2004</p>
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Applicant Signature _____ **Date** March 23, 2005

Printed Name Thomas C. Miller **Phone** (608) 258-5580