

**APPLICATION FOR
URBAN DESIGN COMMISSION
REVIEW AND APPROVAL**

AGENDA ITEM # _____
Project # _____
Legistar # _____

DATE SUBMITTED: 1/15/2014

UDC MEETING DATE: 1/22/2014

Action Requested

- ☒ Informational Presentation
☐ Initial Approval and/or Recommendation
☐ Final Approval and/or Recommendation

PLEASE PRINT!

PLEASE PRINT!

PROJECT ADDRESS: 9601 Elderberry Road, Madison, WI. 53593

ALDERMANIC DISTRICT: 9 (Skidmore)

OWNER/DEVELOPER (Partners and/or Principals) ARCHITECT/DESIGNER/OR AGENT:

Owner: Ziegler at Elderberry LLC

Architect: AG Architecture

Developer: United Financial Group, Inc.

Site Engineer: Trio Engineering

Landscape Architect: Garland Alliance

CONTACT PERSON: Ryan McMurtrie (ext. 137) or Bob Zoelle (ext. 104)

Address: 660 W. Ridgeview Drive
Appleton, WI. 54911

Phone: toll free: 1-877-968-8100

Fax: (920) 731-1696

E-mail address: RMcMurtrie@UFGGroup.net, BobZoelle@UFGGroup.net

TYPE OF PROJECT:

(See Section A for:)

- ☐ Planned Unit Development (PUD)
☐ General Development Plan (GDP)
☐ Specific Implementation Plan (SIP)
☐ Planned Community Development (PCD)
☐ General Development Plan (GDP)
☐ Specific Implementation Plan (SIP)
☐ Planned Residential Development (PRD)
☐ New Construction or Exterior Remodeling in an Urban Design District * (A public hearing is required as well as a fee)
☐ School, Public Building or Space (Fee may be required)
☐ New Construction or Addition to or Remodeling of a Retail, Hotel or Motel Building Exceeding 40,000 Sq. Ft.
☐ Planned Commercial Site

(See Section B for:)

- ☐ New Construction or Exterior Remodeling in C4 District (Fee required)

(See Section C for:)

- ☐ R.P.S.M. Parking Variance (Fee required)

(See Section D for:)

- ☐ Comprehensive Design Review* (Fee required)
☐ Street Graphics Variance* (Fee required)
☒ Other Concept Review for Planned Conditional Use Permit Application

*Public Hearing Required (Submission Deadline 3 Weeks in Advance of Meeting Date)

Where fees are required (as noted above) they apply with the first submittal for either initial or final approval of a project.

January 15, 2014

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

RE: Paragon Place Concept Plan for 9601 Elderberry Road
Tax Parcel #070821300971, located in the Elderberry Neighborhood Development

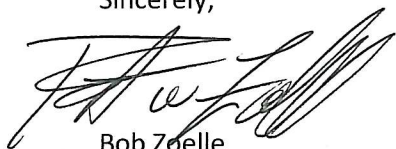
Dear Mr. Martin:

Enclosed is a proposed Application for Urban Design Commission Review for an Informational Presentation before the Commission along with the required 15 collated sets of 11" X 17" exhibits including a locator map and a narrative description of the Paragon Place Concept Plan. A CD-ROM containing PDF files of all the exhibits and materials included as part of this submittal is also enclosed.

Provided that you find this application submittal complete, we respectfully request that this item be placed on the January 22, 2014 Urban Design Commission meeting agenda.

Thank you for your consideration of this request.

Sincerely,



Bob Zoelle
Vice President-Construction
(920) 968-8104
BobZoelle@UFGGroup.net



Ryan McMurtrie
Vice President-Development
(920) 968-8137
RMcMurtrie@UFGGroup.net

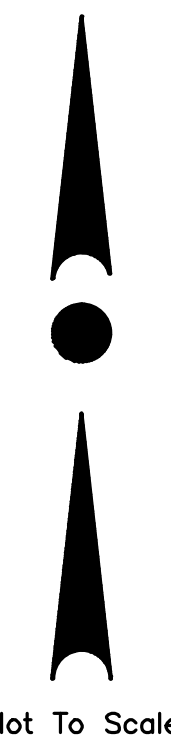
Enclosures: as stated

VICINITY MAP

PROPOSED "PARAGON PLACE PROPERTY"

MADISON, WI

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



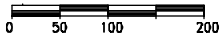
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Date: 01-13-2014

TOPOGRAPHIC EXHIBIT

PROPOSED "Paragon Place Property"

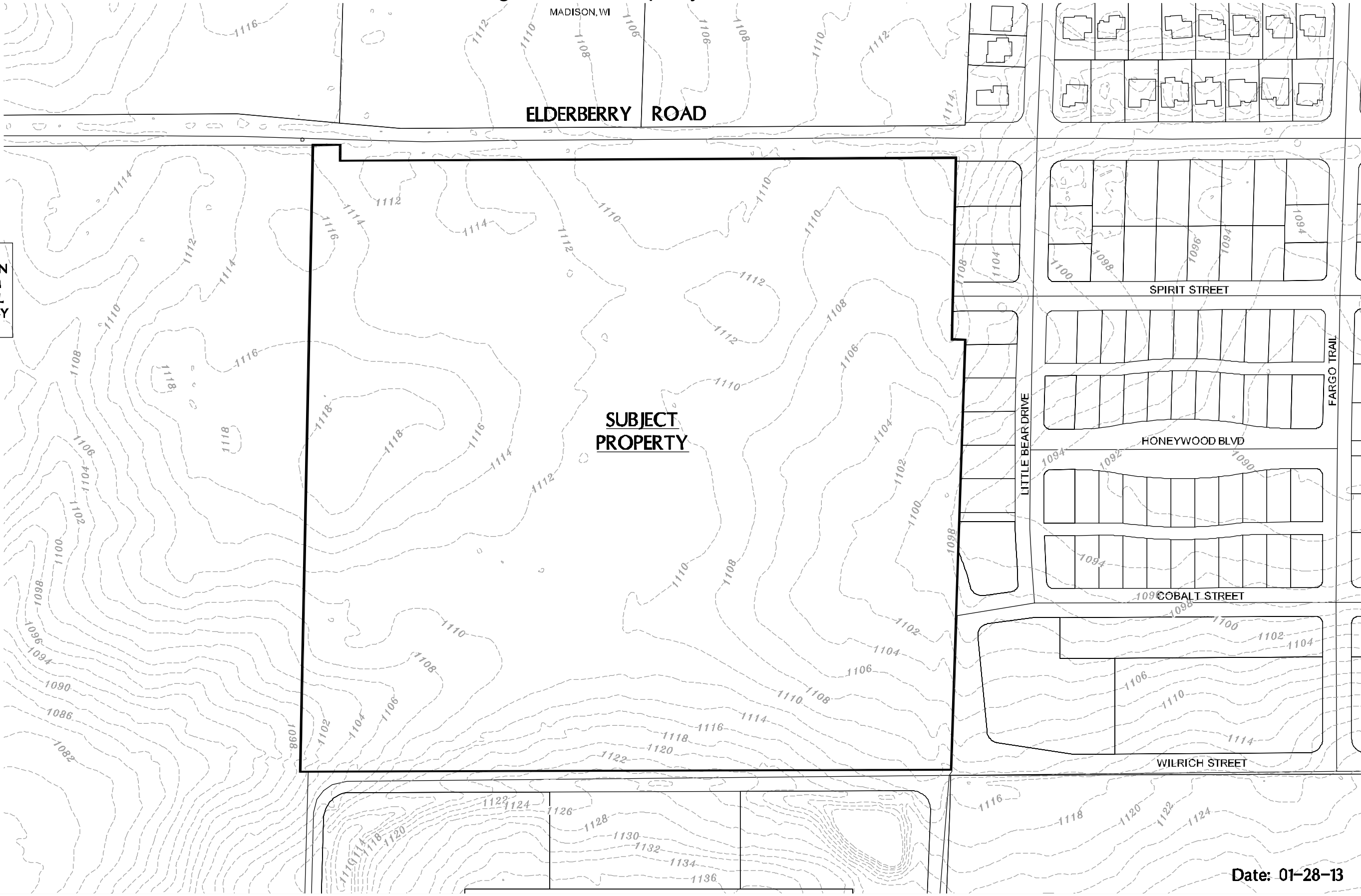
by
UNITED FINANCIAL GROUP, INC.
660 W. Ridgeview Drive
Appleton, WI 54911



Scale: 1" = 100' (22"x34")

Scale: 1" = 200' (11"x17")

NOTE:
EXISTING TOPOGRAPHY SHOWN
HEREON WAS OBTAINED FROM
THE LATEST AVAILABLE DIGITAL
GIS INFORMATION COMPILED BY
DANE COUNTY, WISCONSIN.



Date: 01-28-13

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



PARAGON PLACE

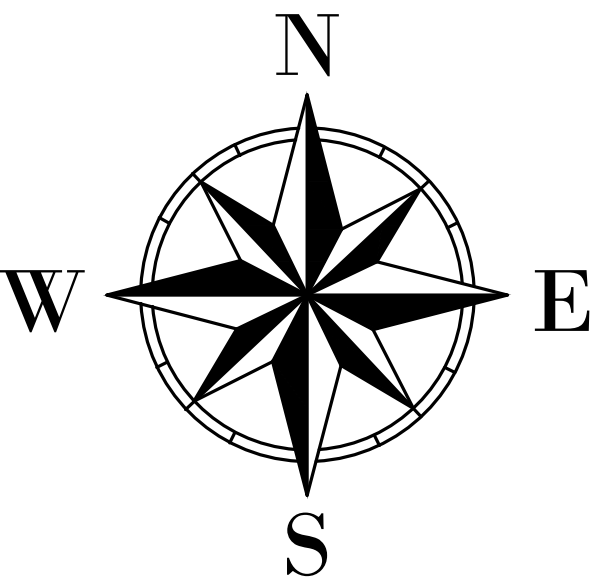
ELDERBERRY NEIGHBORHOOD

CITY OF MADISON, WI

DEVELOPMENT SUMMARY

| | | | |
|---|-------------------------|----------------------|-----------------------------------|
| TOTAL AREA: | 385,315 s.f. (8.84 ac.) | LOT COVERAGE: | 76,033 s.f. (1.745 ac.) |
| ZONING | SR-V2 | - Buildings: | 19,279 s.f. (0.443 ac.) |
| PROPOSED DEVELOPMENT: | | - Sidewalk & Patio: | 72,865 s.f. (1.673 ac.) |
| - Elevator, Underground Parking, Rental Residence with Clubhouse and site amenities | | - Pavement: | 168,177 s.f. (3.861 ac.) |
| TOTAL NUMBER OF UNITS: | 146 units | - TOTAL: | 168,177 s.f. (3.861 ac.) |
| - East Buildings = 32 units/each | | | [43.6% of site] |
| - North Building = 44 units | | OPEN SPACE: | 217,138 s.f. (4.985 ac.) |
| - South Building = 38 units | | | [56.4% of site] |
| | | PARKING: | |
| | | - Underground: | 162 spaces |
| | | - Surface: | 111 spaces |
| | | - SUBTOTAL: | 273 spaces (1.87 spaces per d.u.) |
| | | - Clubhouse: | 27 spaces |
| | | - TOTAL: | 300 spaces |

| | | |
|---|---|--|
| 1/13/2014 | | |
| HIGHLANDS COMMUNITY - ELDERBERRY NEIGHBORHOOD | | |
| SR-V2 DISTRICT ZONING REQUIREMENTS | | |
| | Multi-Family SR-V2 District Requirements (>8 units) | Proposed Lot 6 |
| | Multi-Family | Elevator, Underground Parking, Rental Residences |
| Lot Area (sq. ft.) | 2,000/d.u. | 385,315 |
| | Actual per d.u. = | 2,639 |
| | | Req'd 292,000 |
| Lot Width | 60 ft. | ± 495 ft. |
| Front Yard Setback | 15 ft. or avg. | 25 ft. |
| Side Yard Setback | 10 ft. | N/A |
| Rev. Corner Side Yard Setback | 12 ft. | N/A |
| Rear Yard Setback | 30 ft. | 30 ft. |
| Maximum Height | 3 stories / 40 ft. | 3 stories max./ 44 ft. |
| Conditional Use | 4 stories / 52 ft. | |
| Maximum Lot Coverage | 60% | 43.6% |
| Usable Open Space (sq. ft. per d.u.) | 500 | 890 |
| | Total Usable Open Space = | 129,924 |
| | Total Open Space = | 217,138 |



0 20 40 80

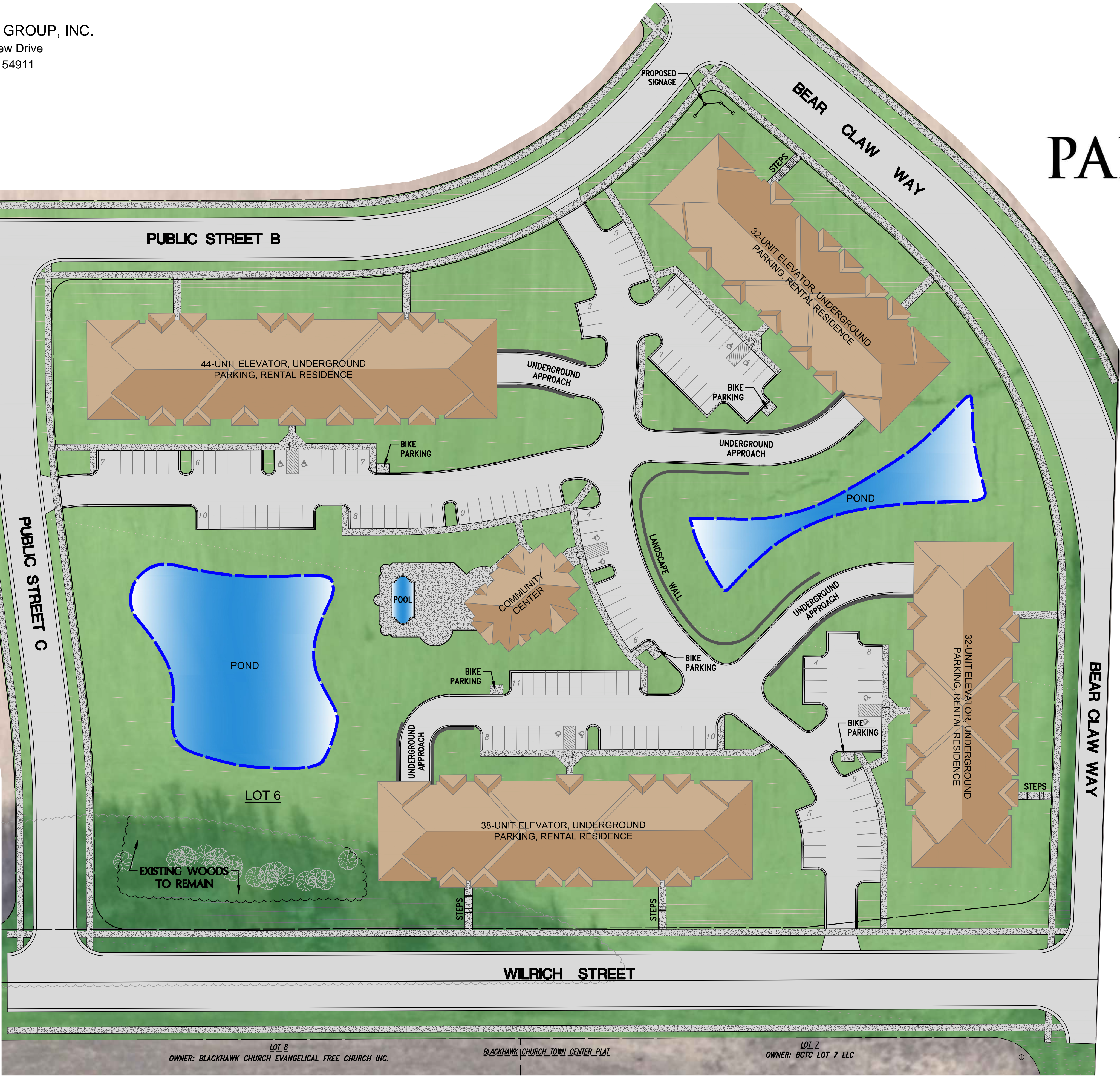
Scale: 1" = 40' (22"x34")

Scale: 1" = 80' (11"x17")

DATE: 01-13-2014



17700 W. CAPITOL DRIVE
BROOKFIELD, WI 53045
PHONE: (262) 790-1480
FAX: (262) 790-1481
EMAIL: jpudelko@trioeng.com



LOT 6
OWNER: BLACKHAWK CHURCH EVANGELICAL FREE CHURCH INC.

BLACKHAWK CHURCH TOWN CENTER PLAT

LOT 7
OWNER: BCTC LOT 7 LLC

LENDERS

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

LAND SELLERS

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

GOVERNMENTAL AGENCIES APPROVING DEVELOPMENTS

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

January 15, 2014

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

RE: Paragon Place Concept Plan for 9601 Elderberry Road - tax parcel #070821300971, located in the Elderberry Neighborhood Development

Dear Commissioners:

This narrative describes the Paragon Place concept plan in support of an anticipated Conditional Use Permit application for property within the Elderberry Neighborhood on the west side of Madison. The proposed development would include 146 units of high-end rental housing with upscale finishes and amenities providing for walkability and continuity with the surrounding neighborhood.

Introduction: United Financial Group, Inc. ("UFG") is a Wisconsin business founded in 1978, and its expertise is in the design, construction, ownership and operation of residential housing communities with a focus on the active senior living market under the name Highlands Communities (HighlandsCommunities.com). Today, UFG operates a portfolio of over 3,400 living units in 16 locations throughout the Milwaukee metro market, Wisconsin Fox River Valley, North central Wisconsin, and currently under construction at the Community of Bishops Bay in Middleton. UFG provides the following services exclusively to its affiliates: professional property management, financial planning, construction management and mortgage administration. UFG strives to provide residents with an exceptional value and a living experience that exceeds expectations. UFG has been in communications with city planning staff regarding the approximately 40 acres of land located at 9601 Elderberry Road since June of 2012, and closed the purchase of the land from the Ziegler family as Sellers on November 20, 2013. UFG has spent that time working to refine the site and building designs in response to staff's feedback. The direction of the Urban Design Commission is being pursued in order to ensure that the end result is a high-quality development that is consistent with the goals, objectives, policies, and recommendations of the Comprehensive Plan and Elderberry Neighborhood Development Plan.

Existing Site: The Elderberry Neighborhood Development Plan, adopted in 2002, is bounded by Pioneer Road on the west, Mineral Point on the south, Pleasant View Road on the east, and Old Sauk Road on the north. 9601 Elderberry Road neighbors the Woodstone Subdivision to the east, is bordered on the south by the Blackhawk Church Town Center Plat, and is southwest of the nearby Sauk Heights development. UFG obtained approvals in May of 2013 for a preliminary plat and rezoning request for the land located at 9601 Elderberry Road, which is south of Elderberry Road within Phase II of the neighborhood plan. The preliminary plat divided the parcel into 7 lots. Lots 1, 3, 4 and 6 were rezoned to SR-V2, lot 2 was rezoned to TR-U1, and lot 5 was rezoned to TR-V2. The Paragon Place concept plan is only applicable to Lot 6. Lot 6 encompasses a total area of approximately 8.9 acres and is enclosed by

Bear Claw Way to the east, Wilrich Street to the south, Public Street C to the west, and Public Street B to the north. Access to lot 6 would be via Wilrich Street or Public Street B, which both extend to the west off of Bear Claw Way. Bear Claw Way will be extended south in the future to make the connection at Mineral Point Road. The present use of the site is Agricultural, and no structures currently exist on the site. The site is located in the Middleton-Cross Plains School District.

Concept Plan Description: The Paragon Place concept plan for lot 6 consists of a total of 146 units contained within two 32-unit buildings, one 44-unit building, one 38-unit building, and a freestanding amenity building. The buildings are oriented to create active street fronts that relate to the public sidewalks, enabling residents to easily walk throughout the community. The building locations were carefully planned to ensure most of the existing trees in the southwest portion of the site could be preserved, and to mitigate the appearance of the surface parking from the surrounding streets. The freestanding amenity building has been positioned to provide users with terminal views of green space and water features, while being centrally located to ensure easy access to all residents. The amenity building would house a fitness center, business center, TV room, gathering room, kitchen/dining room, playroom/conference room, restrooms, property management office, leasing office, and pool. All buildings contain an elevator and heated underground parking for cars and bikes, as well as internal refuse/recycling containers. Shared building driveways provide residents access to the underground parking and allow for refuse collection. These residences will consist of 22% 1,360+ sq. ft. two bedroom/two bathroom units; 37% 775+ sq. ft. one bedroom units; and 41% 1,050+ sq. ft. two bedroom/two bathroom units. The exteriors will consist primarily of two different colors of brick, with full bed depth stone and fiber cement panel accents. Different styles of windows were incorporated into the architecture to provide variety and guarantee large amounts of natural light for all units. The buildings were designed to transition from 3-stories to 2-stories to moderate the massing of the buildings and appearance of the roof line. The landscaping plan creates a sense of community for its residents. Layered plantings scaled to the particular building type allow the buildings to become part of the garden. Plants have been selected to create a cohesive assortment of natives accented with premier garden type plants. Standard "commercial" type plants were avoided. Ornamental grasses dominate the gardens and naturalized areas embrace the buildings, blurring the distinction between a manicured commercial look and a natural area. Rare and unique trees are planned for the street tree plantings. The result is a residential community that has an Arboretum type setting.

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

Concluding Statements:

UFG is a 35-year experienced Wisconsin and Milwaukee-Metro operator of high-end rental communities. The strong financial structure of UFG has allowed continued development and expansion even during the last five years when construction and real estate financing was not available for many Wisconsin development opportunities. This proposed Paragon Place Property, as is true with all UFG developments, will be wholly owned by the McMurtrie-Salmon principals of UFG and all construction and property management services will be provided by United Financial Group, Inc. Financial and community reference contacts have been provided in this submittal.

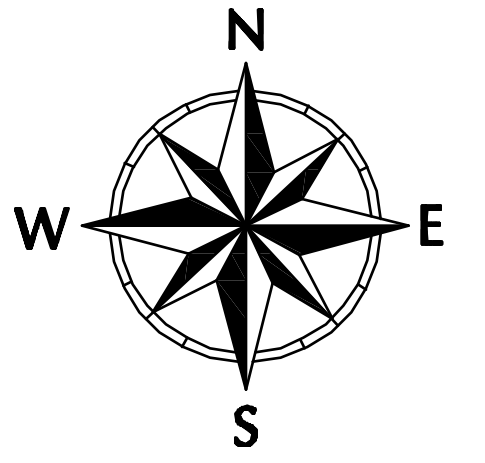
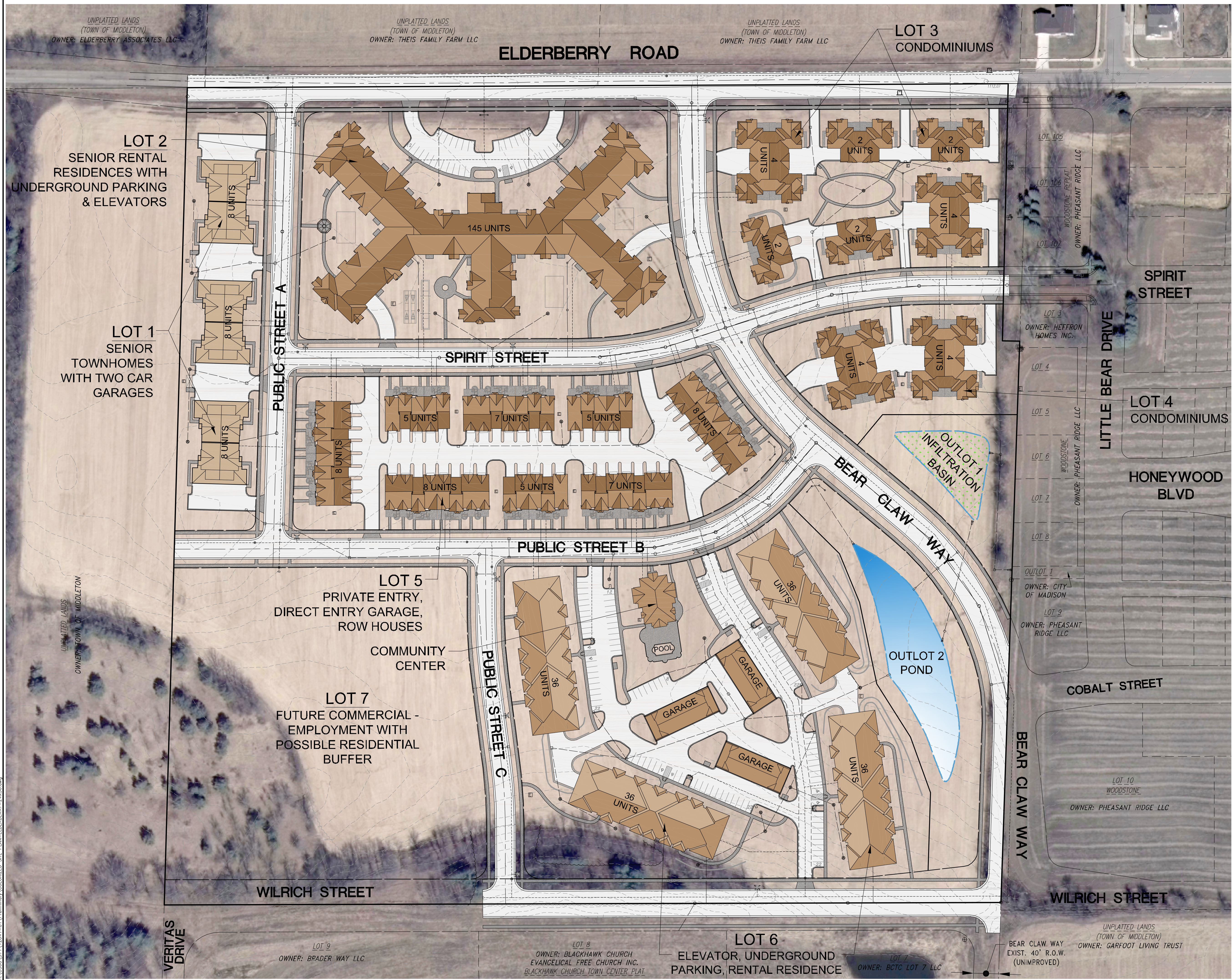
We look forward to continuing to work with City staff on this project. Should you have any questions, please call us at (920) 968-8100 ext. 105, 137, or 104.

Sincerely,



Ryan McMurtrie

Vice President of Development



HIGHLANDS COMMUNITY

ELDERBERRY NEIGHBORHOOD

CITY OF MADISON, WISCONSIN

DEVELOPMENT SUMMARY

- SITE ADDRESS: 9601 ELDERBERRY ROAD
- TOTAL SITE AREA = 40.10 ACRES
- EXIST. PROPERTY AREA = 39.10 ACRES (EXCLUDING 33' ELDERBERRY R.O.W.)
- PROP. PROPERTY AREA = 38.89 ACRES (EXCLUDING 40' ELDERBERRY R.O.W.)
- FUTURE COMMERCIAL - EMPLOYMENT WITH POSSIBLE RESIDENTIAL BUFFER = 5.64 ACRES
- RESIDENTIAL AREA = 33.25 ACRES
- NET RESIDENTIAL AREA = 25.16 ACRES

- SENIOR RENTAL RESIDENCES WITH UNDERGROUND PARKING & ELEVATORS:
 - 1 - 145 UNIT = 145 UNITS
- SENIOR TOWNHOMES WITH TWO CAR GARAGES:
 - 3 - 8 UNIT/BLDG = 24 UNITS

- CONDOMINIUMS:
 - 4 - 2-UNIT & 4 - 4-UNIT = 24 UNITS
- PRIVATE ENTRY, DIRECT ENTRY GARAGE, ROW HOUSES:
 - 3 - 8-UNIT, 2 - 7-UNIT & 3 - 5-UNIT = 53 UNITS
- ELEVATOR, UNDERGROUND PARKING, RENTAL RESIDENCE:
 - 4 - 36 UNIT/BLDG = 144 UNITS

TOTAL UNITS = 390 UNITS

- GROSS SITE BUILDING COVERAGE = 296,070 S.F.
- NET RESIDENTIAL DENSITY = 15.50 UNITS/ACRE
- TOTAL SITE DENSITY = 10.03 UNITS/ACRE

PARKING SUMMARY

REQUIRED OFF STREET PARKING REQUIREMENTS PER ZONING CODE FOR MULTI-FAMILY DWELLING:

- MINIMUM = 1 PER DWELLING
- MAXIMUM = 2.5 PER DWELLING

- SENIOR RENTAL RESIDENCES: REQ'D = 145 SPACES
 - UNDERGROUND = 145
 - SURFACE = 37
 - TOTAL = 182 (1.26/UNIT)
 - (2 HC ACCESSIBLE GUEST SPACES)

- SENIOR TOWNHOMES: REQ'D = 24 SPACES
 - GARAGE = 48
 - TOTAL = 48 (2.00/UNIT)

- CONDOMINIUMS: REQ'D = 24 SPACES
 - GARAGE = 48
 - TOTAL = 48 (2.00/UNIT)

- ROW HOUSES: REQ'D = 53 SPACES
 - GARAGE = 106
 - TOTAL = 106 (2.00/UNIT)

- ELEVATOR, UNDERGROUND PARKING, RENTAL RESIDENCE: REQ'D = 144 SPACES
 - UNDERGROUND = 144
 - SURFACE GARAGES = 54
 - SURFACE = 88
 - TOTAL = 286 (1.99/UNIT)
 - (8 HC ACCESSIBLE SPACES)

NOTE: VISITOR PARKING FOR SENIOR TOWNHOMES AND ROW HOUSES IS PROVIDED IN DRIVEWAY IN FRONT OF EACH UNITS GARAGE.

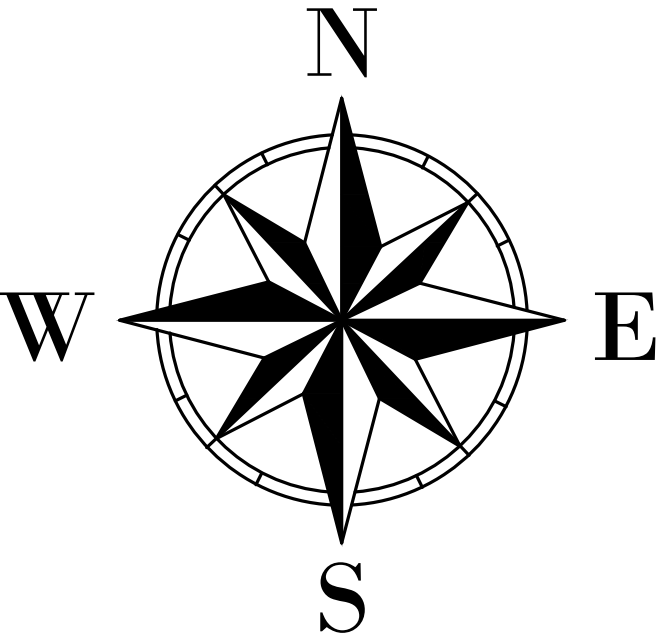
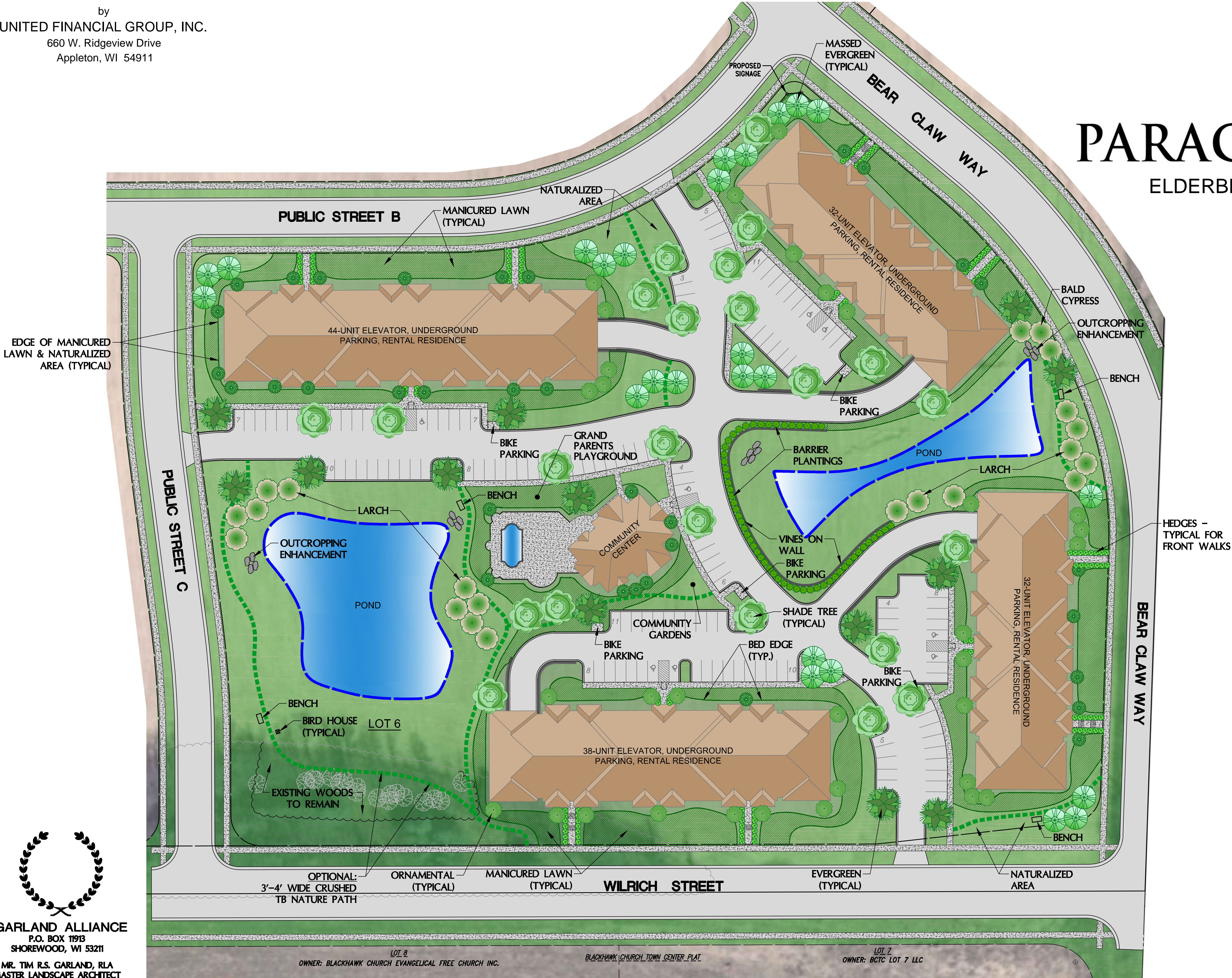
- COMMUNITY CENTER: 29 SPACES (2 HC ACCESSIBLE SPACES)

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



PARAGON PLACE

ELDERBERRY NEIGHBORHOOD
CITY OF MADISON, WI



0 20 40 80

Scale: 1" = 40' (22"x34")
Scale: 1" = 80' (11"x17")

DATE: 01-13-2014


GARLAND ALLIANCE
P.O. BOX 11913
SHOREWOOD, WI 53211
MR. TIM R.S. GARLAND, RLA
MASTER LANDSCAPE ARCHITECT

AREA MAP

PROPOSED "PARAGON PLACE PROPERTY"

MADISON, WI



Not To Scale

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



Date: 01-13-2014



SIDE ELEVATION



FRONT ELEVATION

Proposed Paragon Place Property
32 Rental Residences
Madison, Wisconsin

14 Jan 2014



Architecture
 1414 UNDERWOOD AVE.
 WAUWATOSA, WI 53213
 414.431.3131 TEL
 414.431.0531 FAX
 WWW.AGARCH.COM



SIDE ELEVATION



BACK ELEVATION

Proposed Paragon Place Property
32 Rental Residences
Madison, Wisconsin

14 Jan 2014





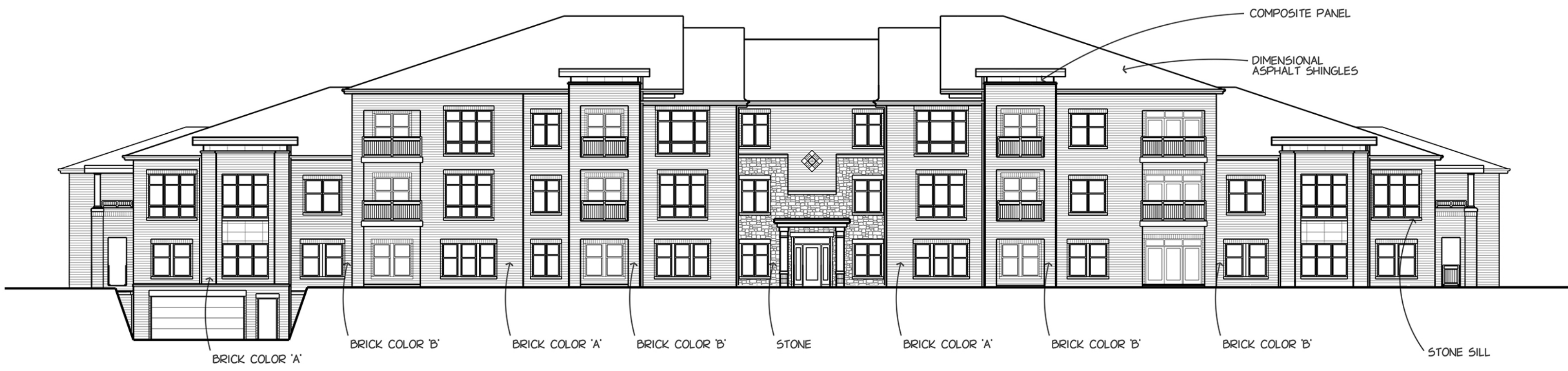
SIDE ELEVATION



FRONT ELEVATION



SIDE ELEVATION

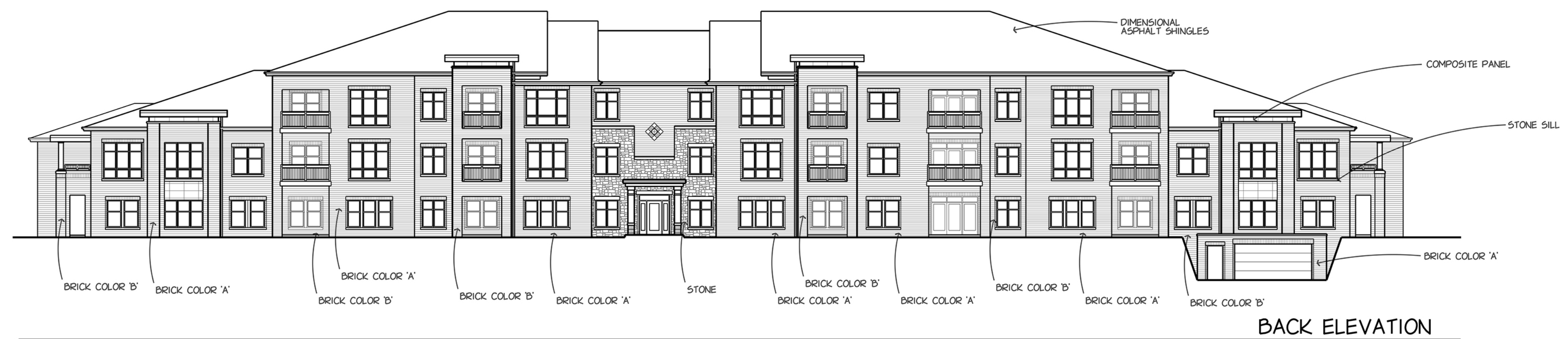


BACK ELEVATION

14 Jan 2014

Proposed Paragon Place Property
32 Rental Residences
Madison, Wisconsin

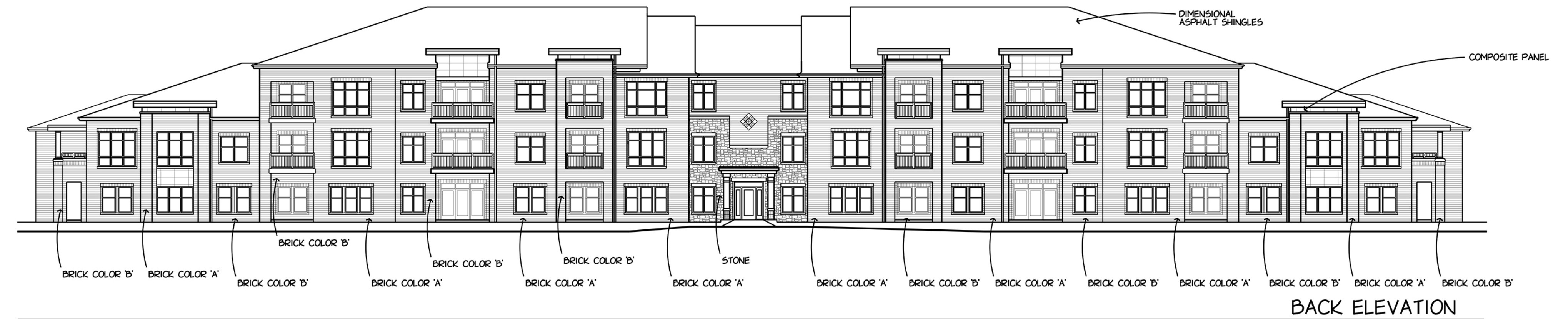
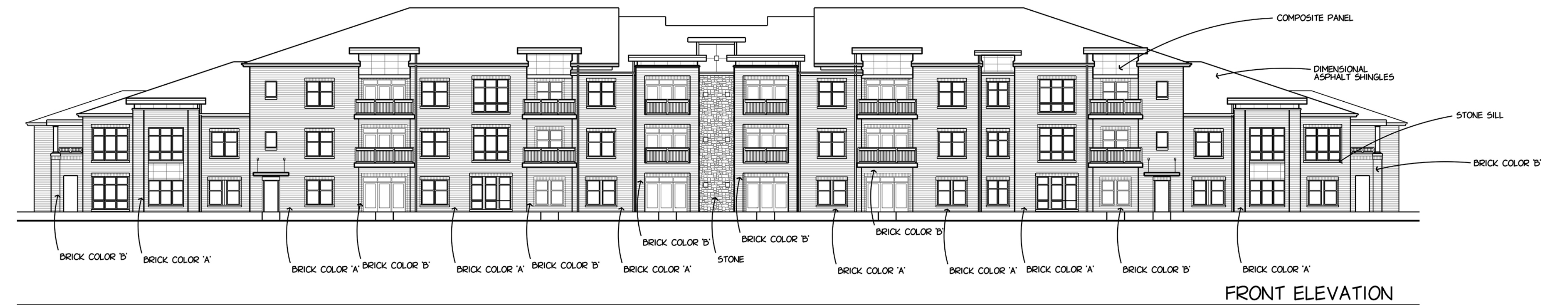




4 Jan 2014

Proposed Paragon Place Property
38 Rental Residences
Madison, Wisconsin

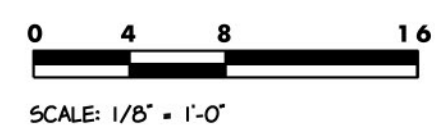




Proposed Paragon Place Property
44 Rental Residences
Madison, Wisconsin

14 Jan 2014





Proposed Highlands Community
36 Unit Apartments
Madison, Wisconsin

29 Jan 2013





SIDE ELEVATION



FRONT ELEVATION

0 4 8 16
SCALE: 1/8" = 1'-0"

29 Jan 2013

Proposed Highlands Community
36 Unit Apartments
Madison, Wisconsin