

March 19<sup>th</sup>, 2019

Ms. Heather Stouder  
Department of Planning & Community & Economic Development  
City of Madison  
215 Martin Luther King Jr. Blvd., Suite 017 (Level Zero "0")  
Madison, Wisconsin 53703

RE: **Letter of Intent - Zoning Map Amendment & Preliminary Plat:  
Herring Property Subdivision  
10250 Mineral Point Road  
Madison, WI. 53593**

Ms. Heather Stouder:

The following is submitted together with the applications, filing fees, and plans for Plan Commission, Common Council and staff review.

**Project Team:**

*United Financial Group, Inc.*  
Role: Applicant/Construction Manager  
660 W. Ridgeview Drive  
Appleton, WI. 54911  
(920) 968-8137  
Contact: Ryan McMurtrie  
Email: [RMcMurtrie@UFGGroup.net](mailto:RMcMurtrie@UFGGroup.net)

*Trio Engineering*  
Role: Civil Engineer  
12660 W. North Avenue, Building D  
Brookfield, WI. 53005  
(262) 790-1480  
Contact: Josh Pudelko, M.S., P.E.  
Email: [JPudelko@Trioeng.com](mailto:JPudelko@Trioeng.com)

*AG Architecture*  
Role: Architect  
1414 Underwood Avenue  
Wauwatosa, WI. 53213  
(414) 431-3131  
Contact: John Cronin, AIA  
Email: [JJCron@AGarch.com](mailto:JJCron@AGarch.com)

*Garland Alliance, Inc.*  
Role: Landscape Architect  
5707 6<sup>th</sup> Avenue  
Kenosha, WI. 53140  
(414) 688-1641  
Contact: Tim Garland  
Email: [GarlandAlliance@gmail.com](mailto:GarlandAlliance@gmail.com)

Herring Family Limited Partnership\*  
Role: Land Owner  
3991 Barlow Road  
Cross Plains, WI. 53528  
Contact: Greg Herring  
Email: [PHerr@aol.com](mailto:PHerr@aol.com)

*\*Please note the Applicant is not the current landowner. The Applicant is under contract with the current landowner to acquire the site.*

**Introduction:**

The Herrling Property is located on the west side of Madison within the southwest portion of the Elderberry Neighborhood, directly northeast of the intersection of Pioneer Road and Mineral Point Road. United Financial Group, Inc. (UFG) is seeking approval of a Preliminary Plat and Zoning Map Amendment applicable to the entire parcel located at 10250 Mineral Point Road. The 10 different areas subject to the rezoning request total ± 6,051,495 square feet.

**Project Description & Schedule:**

The proposed Preliminary Plat and Zoning Map Amendment would result in the Herrling Property Subdivision consisting of the following lots, zoning classifications, and uses:

Lot Number	Proposed Zoning Classification	Proposed Use
1-127, 132-133	SR-C3	Single-Family housing lots
128-131, 146	TR-V2	Age-restricted 55+ Townhomes
134, 142	TR-U1	Age-restricted 55+ Rental Residences
135-138, 140-141	TR-U1	Rental Residences
139	SR-V2	Rental Residences
143	SR-V2	Age-restricted 55+ Rental Residences
144-145	TR-V2	Rowhouses

Outlot Number	Proposed Zoning Classification	Proposed Use
1-3, 10-12	SR-C3	Local Storm Water Area
4	TR-V2	Surface Drainage
5-7	PR (Parks and Recreation)	Neighborhood Park & Greenway Corridor
8	TR-U1	Regional Storm Water Area
9	SR-C3	Regional Storm Water Area

UFG has built, owned, and operated 55+ age-restricted rental communities for more than 30 years, and currently has a portfolio of ≈3,000 units in 12 communities, all within the state of Wisconsin. This experience has provided UFG with an understanding of the intricacies associated with this segment of the rental market. Typical residents of 55+ communities do not want to be directly against busy roads or active parks, which led UFG to target lots 134, 142, and 143 for the 55+ rental residences. Lot 142 is particularly important for the development, as it is the only lot which caters to the specific living preferences of 55+ renters while concurrently being large enough to accommodate a contiguous building which would provide residents with direct access to the amenities. Unlike market-rate renters, 55+ residents are extremely averse to walking outside in the winter months. As a result, developments consisting of smaller, discrete buildings can lead to social isolation and an increased potential for injuries.

UFG emphasized these issues at the Plan Commission meeting in June of 2018, where the Draft Elderberry Neighborhood Plan was discussed. UFG stated the north half of lot 134, and lot 142 should be planned for Housing Mix 3 (*rather than Housing Mix 2*) to provide for TR-U1 zoning, and lot 143 should be planned for Housing Mix 2 (*rather than Housing Mix 1*) to provide for SR-V2 zoning. It is important to

note the age-restricted 55+ townhomes were consciously placed along the north property line to serve as a buffer between the single-family homes to the north and the proposed 55+ rental residences to the south. In UFG's experience, single-family homes and age-restricted 55+ townhomes are complementary product types.

Outside of lots 134, 142, and 143, the proposed Preliminary Plat and Zoning Map Amendment are consistent with the direction received from planning and zoning staff, and conform to the recently adopted Elderberry Neighborhood Plan.

An informal neighborhood Open House was held at the Blackhawk Church on November 29<sup>th</sup>, 2018 to ensure all neighbors had the opportunity to ask questions and view plans related to these requests for approval. A copy of the postcard sent out to neighbors has been included with this submittal.

**Existing Site Conditions & Project Schedule/Phasing Plan:**

The site subject to these requests for approval does not contain any structures, and is currently zoned Agricultural. The initial intent was to begin development on the 55+ community in the northeast corner, but this is not practical until Elderberry Road is extended to the site through the land currently owned by the Town of Middleton. As a result, the western portion of the site containing the single-family homes would likely be the first area developed, and infrastructure would be constructed in phases as necessary.

**Concluding Statements:**

UFG is a family-owned organization with more than 40 years of experience owning and operating apartment communities in Wisconsin. The Herring Property Subdivision, as is true with all UFG developments, will be wholly owned by the McMurtrie-Salmon families, and all construction and property management services will be provided by United Financial Group, Inc.

Thank you for taking the time to review and consider our proposal.

Sincerely,

*Ryan McMurtrie*

Ryan McMurtrie

Vice President - Development