

Inclusionary Dwelling Unit Plan  
30 Condominium units  
2425 Jeffy Trail  
May 23, 2007

1. Project Narrative:
  - a. General Character of the Intended Development: This project is located at 2425 Jeffy Trail. The property is currently zoned R4 and is approximately 230,844 square feet in area. The development proposal envisions new owner-occupied condominiums for the professional and empty-nester market. The proposed buildings are one story with a total of 30 condominium units. The development will include garage and surface parking with an overall parking ratio of 2.26 stalls per unit.
  - b. Owner, Developer and Future Owner Identification:
    - i. Owner: McKy-North, LLC  
906 Sauk Ridge Trail  
Madison, WI 53717
    - ii. Developer: McKy-North, LLC
    - iii. Future: Owner Occupied
  - c. Construction Schedule: Following approval, we expect to begin the development of the site in Summer 2007 with completion of the first building for occupancy in Spring 2008. Construction of subsequent buildings would proceed as market conditions dictate.
2. Plans: A copy of the preliminary plan is attached hereto as Exhibit A, which shows the location and distribution of the Inclusionary Dwelling Units throughout the buildings.
3. Additional Information: See Letter of Intent.

**Exhibit B**

IDU Plan for Lot 77 of the Second Addition to Hawk's Creek Townhomes – 30-unit Condominium project located at  
 2425 Jeffy Trail  
 Submitted 5/23/07

Inclusionary Dwelling Units:

<b>Bldg #</b>	<b>Total Units</b>	<b># IDU's</b>	<b>IDU Unit Address</b>	<b>IDU BR Count</b>	<b>IDU Size</b>	<b>% AMI</b>	<b>Condo Fee</b>	<b>Sale Price</b>
1	4	1	Not available	3 Br	1,572 sf	80%		
2	4	1	Not available	3 Br	1,572 sf	70%		
3	4	0	Not available					
4	4	1	Not available	3 Br	1,572 sf	80%		
5	4	1	Not available	3 Br	1,572 sf	70%		
6	2	0	Not available					
7	2	0	Not available					
8	2	0	Not available					
9	2	0	Not available	3 Br.	1,710 sf	80%		
10	2	1	Not available					
<b>Totals</b>	<b>30</b>	<b>5</b>						

**PART 1 – DEVELOPMENT INFORMATION:**

**Project or Plat** Lot 77 - Second Addition to Hawk's Creek Plat

**Project Address:** 2425 Jeffy Trail **Project Area (in acres):** 5.29 acres

**Developer:** McKy-North, LLC **Representative:** Rick McKy

Street Address: 906 Sauk Ridge Trail City/State: Madison, WI Zip: 53717

Telephone: ( 608 ) 836-9300 Fax: ( 608 ) 836-3744 Email: rmckv@starkhomes.com

**Agent, If Any:** J. Randy Bruce **Company:** Knothe & Bruce Architects, LLC

Street Address: 7601 University Ave. Ste. 201 City/State: Middleton, WI Zip: 53562

Telephone: ( 608 ) 836-3690 Fax: ( 608 ) 836-6934 Email: rbruce@knothebruce.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						
Duplexes	9		1		10	
Multi-Family	16		4		20	
<b>TOTAL</b>	25		5		30	

**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					2	3	5
Anticipated Sale Price						*	
Rental Units	30%	40%	50%	60%	70%	80%	Total
Number at Percent of AMI							
Maximum Monthly Rent Price							

*\* as allowed by ordinance*

**PART 4 – DWELLING UNIT COMPARISON:**

Complete the following table as it pertains to this project:

	MARKET-RATE UNITS					INCLUSIONARY UNITS				
	Studio / Efficcy	1 Bdrm	2 Bdrms	3 Bdrms	4/More Bdrms	Studio / Efficcy	1 Bdrm	2 Bdrms	3 Bdrms	4/More Bdrms
<b>Owner-Occupied Units with:</b>										
Minimum Floor Area:				1684					1572	
<b>Rental Units With:</b>										
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

Standards for Inclusionary Dwelling Units (IDUs)	Will Comply	Will not comply	Additional comments
Exterior Appearance of IDUs are similar to Market rate.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Proportion of attached and detached IDU units is similar to Market rate.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Mix of IDUs by bedroom size is similar to market rate.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

CONTINUE →

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

- The applicant discussed this development proposal with representatives from the Planning Unit, Zoning Administrator and Community Development Block Grant Office on: 5/10/07 → \_\_\_\_\_
- The applicant presented a preliminary development plan for this project to the Interdepartmental Review Staff Team on: 5/10/07 → \_\_\_\_\_
- The applicant notified Alderperson Jed Sandborn of District 1 of this development proposal in writing on: → \_\_\_\_\_
- The applicant also notified \_\_\_\_\_ of the \_\_\_\_\_ neighborhood in writing on: \_\_\_\_\_
- The Inclusionary Dwelling Unit Plan Application package contains ALL of the materials required as noted on this form. I, as the undersigned, acknowledge that incomplete or incorrect submittals may cause delays in the review of this project. I am also familiar with the ongoing developer responsibilities summarized on page #2 of this application and outlined in the Inclusionary Zoning Ordinance and Program Policy and Protocols.

**Applicant Signature** \_\_\_\_\_ **Date** 5/23/07

**Printed Name** Rick McKy **Phone** ( 60 ) 836-9300

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Notes

Revisions  
December 13, 2006- Informational UDC Submittal  
May 23, 2007- Conditional Use Submittal

Project Title  
**2425 Jeffy Trail**  
Lot 77, 2nd Add. to  
Hawk's Creek Plat

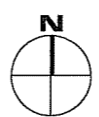
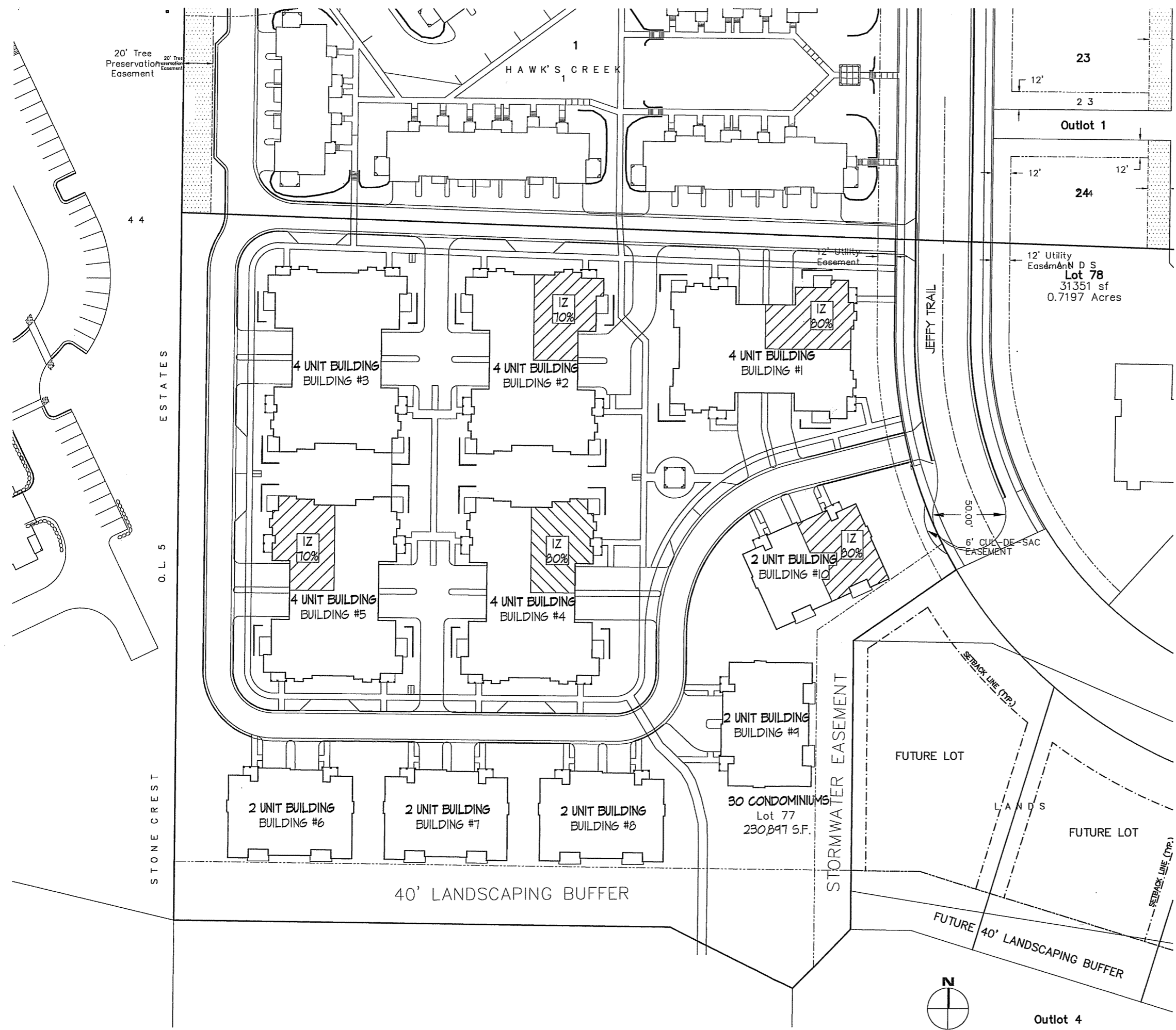
Drawing Title  
**Site Plan- IZ**

SCALE 1"=30'

Project No. Drawing No.

0519 C-1.1 IZ

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Outlot 4

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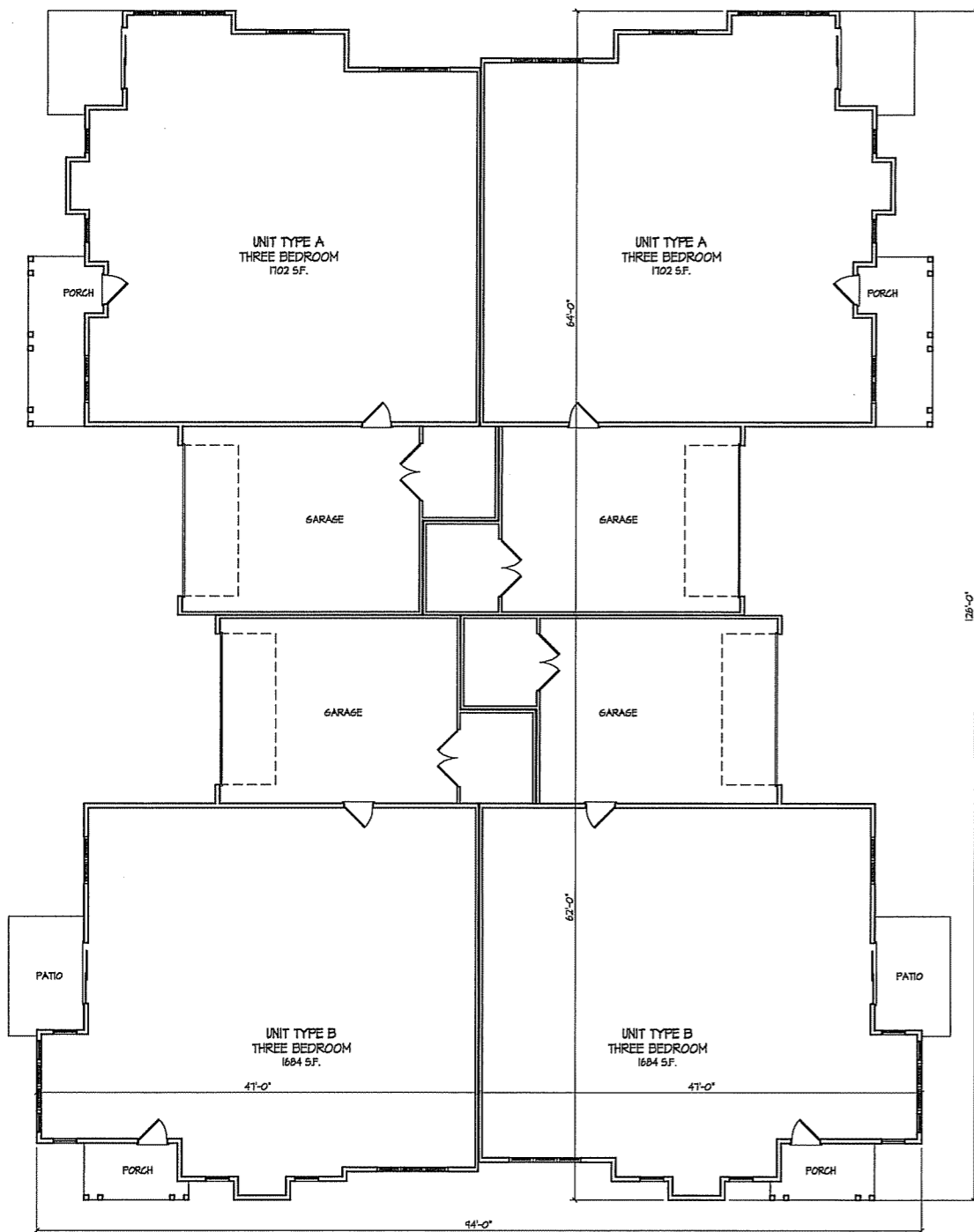
Notes  
 Date

Revisions  
 May 29, 2007- Conditional Use Submittal

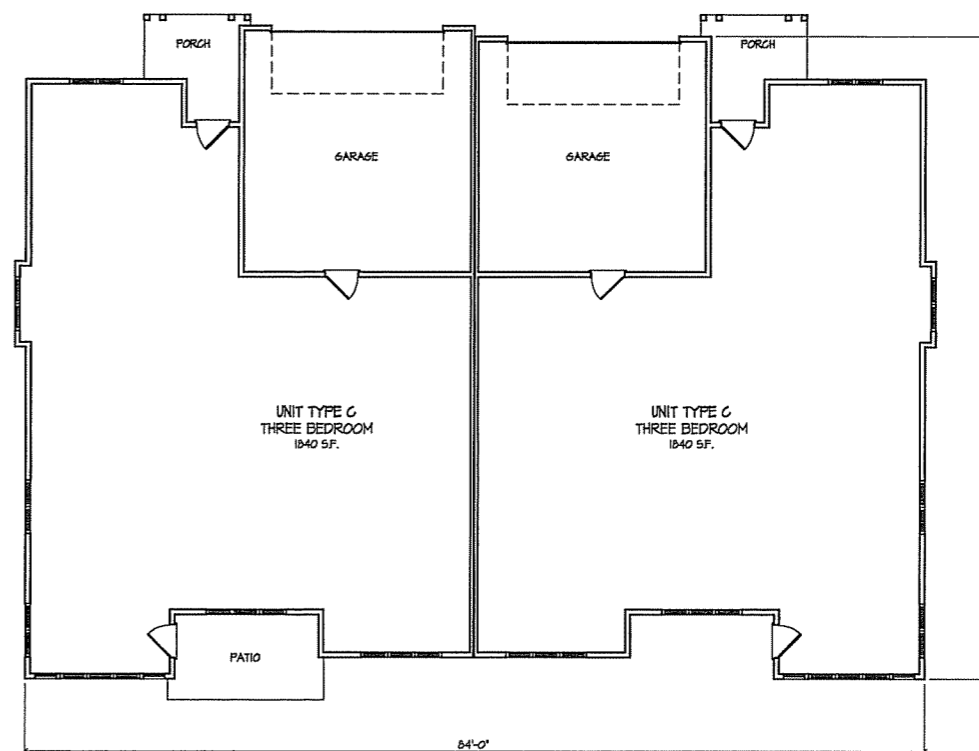
Project Title  
 2425 Jeffy Trail  
 Lot 77, 2nd Add. to  
 Hawk's Creek Plat

Drawing Title  
**Conceptual Floor Plans**  
 SCALE 1/8"=1'  
 Project No. 0519 Drawing No. A-1.1

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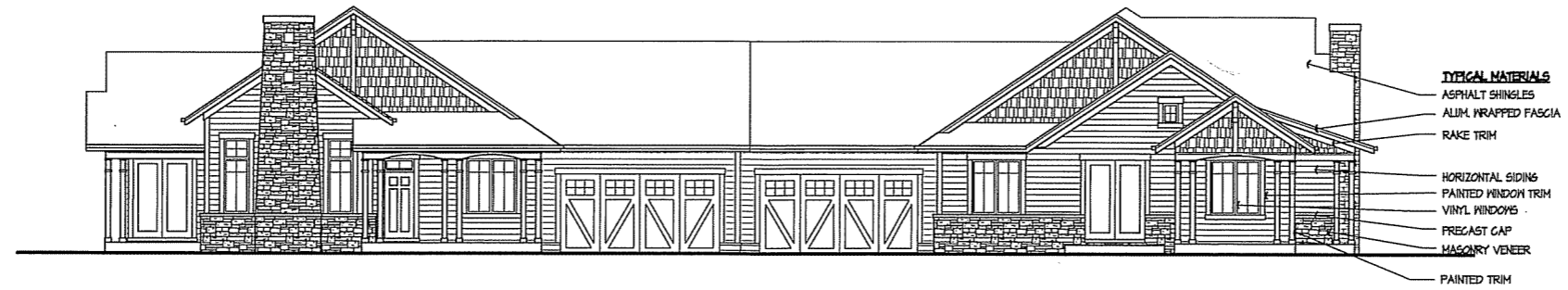
4 UNIT FLOOR PLAN  
 1/8" = 1'-0"



2 UNIT FLOOR PLAN  
 1/8" = 1'-0"

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Notes  
Date



4 UNIT SIDE ELEVATION  
1/8" = 1'-0"



4 UNIT FRONT ELEVATION  
1/8" = 1'-0"



2 UNIT SIDE ELEVATION  
1/8" = 1'-0"



2 UNIT FRONT ELEVATION  
1/8" = 1'-0"

Revisions  
May 23, 2007- Conditional Use Submittal

Project Title  
2425 Jeffy Trail  
Lot 77, 2nd Add. to  
Hawk's Creek Plat

Drawing Title  
**Conceptual Elevations**  
SCALE 1/8"=1'  
Project No. Drawing No.

0519 A-2.1

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