

# LETTER OF INTENT

FOR

MARY MORGAN AND DAVID SHERIFF

5404 LAKE MENDOTA DRIVE • SPRING HARBOR NEIGHBORHOOD • MADISON WI

## Property Description

The property is located at 5404 Lake Mendota Drive in the Spring Harbor Neighborhood, 19<sup>th</sup> Aldermanic District. The zoning district is TR-C1. The 2016 assessed value is \$984,500. Detailed property information from the City Assessor is in Annex F.

## Project Description

We intend to demolish the existing single-family residence, detached garage, asphalt driveway, concrete walk, concrete apron, and rear deck. The only structure to remain is the existing concrete pier apron in the northwest corner of the property.

New construction includes a two-story single-family home with attached garage, a rear patio, and a narrow side deck with walkway to join the side entrance to the rear patio. The roofs are flat, with the exception of a raised barrel vault above the northeast corner of the second story. A detailed analysis of the project costs has not been performed, but our preliminary construction cost estimate is approximately \$1,500,000.

Demolition is expected to begin in December, 2016. Site preparation will commence thereafter, with general construction following in the spring of 2017. Completion is scheduled for December, 2017. Final landscaping may not be fully established until the spring of 2018.

## Project History

A previous proposal was submitted to the Planning Division in 2015; please reference the *Planning Division Staff Report*, Legistar File ID #37368, dated December 7, 2015. This previous proposal was presented to the Spring Harbor Neighborhood Association (SHNA) in May and July of 2015.

Several concerns were raised by the SHNA that we have addressed in the new proposal. These changes are bordered with a solid line throughout this document.

The Spring Harbor Neighborhood Plan (SHNP) adopted several goals with recommendations. Aspects of the new proposal that help achieve these goals are bordered with a dashed line throughout this document.

A pre-application meeting was held with Kevin Firchow, Planner, and Jenny Kirchgatter, Assistant Zoning Administrator, on August 2, 2016.

Pre-application notifications were delivered to the District 19 Alder and the SHNA President on September 9, 2016 (Annex A).

A Demolition Permit Notification was submitted on September 9, 2016 (Annex A).

The new proposal was presented to the SHNA Board of Directors and the District 19 Alder on September 13, 2016. Since that time several minor revisions have been made, though the general intent and project scope is unchanged. A follow-up presentation to the SHNA is planned to review the revisions and to brief the neighborhood on the materials as submitted with this application.

### **Project Goals**

- Design a unique, attractive, high-quality home for Mary, David, and their children.
- Improve the view from the street with custom landscaping and unique architectural features.
- Improve the water quality of Lake Mendota by capturing storm-water run-off on-site.

### **Project Team**

#### Architect

Robert Bouril, AIA  
Bouril Design Studio, LLC  
Madison, WI  
[www.bourildesign.com](http://www.bourildesign.com)

BDS has 28 years of experience designing custom homes and commercial buildings of the highest quality. Their portfolio encompasses single-family, multi-family, hospitality, restaurant, institutional, medical, and office projects.

#### Landscape Architect

Steven Ziegler, PLA  
ZDA Inc  
Middleton, WI  
[www.zdainc.com](http://www.zdainc.com)

ZDA is an award-winning team of designers with extensive experience in private and civic projects. Their reputation is built on providing sustainable, environmentally sensitive solutions that are both functional and beautiful.

Civil Engineer

Erik Sorensen, PE  
MSA Professional Services  
Madison, WI  
www.msa-ps.com

MSA is a consulting firm with a team of architects, engineers, surveyors, and multi-discipline design professionals. They have a vast amount of experience in private and municipal projects and can provide a comprehensive solution to site design and storm-water management.

**Demolition**

Demolition of the property presents no significant problems and should be fairly straightforward. Drawings C1.1 and L1.0 illustrate the extent of demolition of the existing structures and exterior elements. Briefly, everything is being removed, with the exception of the concrete pier apron on the northwest corner of the lot.

In accordance with the SHNP Goal #21, Recommendation #53, we propose to remove the overhead utility lines that bisect the property from east to west, and bury them below ground. This work will be coordinated with the adjacent property owners.

A walk-through was performed on Thursday, September 22, 2016 with Frank Byrne, Deconstruction Manager, Habitat for Humanity Restore, to identify materials for re-use. A draft *Re-use and Recycling Plan* was submitted for review and comment to Bryan Johnson, Recycling Coordinator, on October 5, 2016. Mr. Johnson returned comment on October 10, 2016. The final plan will be re-submitted to Mr. Johnson pending Plan Commission approval. The draft is included with this application.

The *Report of the Preservation Planner*, dated October 30, 2015, required evidence that the project would not disturb any burial sites. Chip Brown, Senior Compliance Officer, State Historic Preservation Office, assessed the property for archeological significance and concluded the State's human burial site preservation law does not apply (Annex B).

**New Construction**

The property is located at 5404 Lake Mendota Drive, across from the Spring Harbor Beach parking lot, and one lot west of the intersection of Lake Mendota Drive and Harbor Court. The property is in the TR-C1 zoning district. The assessed lot area is 23,719 square feet (SF). All required zoning limits are met (Drawing T1.1 and L1.1).

The overall form and character of the home has been changed significantly from the previous proposal (Annex C, and Drawing E1.0). Rectilinear forms are joined at shallow angles to provide interest and depth, and to reduce the appearance of a single, monolithic façade. Extensive areas of glass further break up the form and provide a level of perceived transparency. There is only one pitched roof – a small barrel vault on the northeast corner at the second floor.

Several members of the SHNA objected to the previous proposal's massive, monolithic appearance. It lacked character and didn't respect the precedent of other unique designs along Lake Mendota Drive. We've taken an entirely different approach to the new design. To an extent we've allowed the form to drive the function, placing a greater emphasis on the exterior elements than the pure functionality of the interior spaces. We've chosen several natural materials to vary the color and texture of the façade. There are very few 90-degree wall intersections, and many changes in direction and height; these subtle variations reduce the visual impact of the structure and create a more organic, descriptive aesthetic.

There were concerns about the risks and hazards associated with excavating living space below the water table. We acknowledge these risks and have removed the basement from the project; this requires us to move to the first floor some of the functional areas that are normally in a basement, e.g. mechanical equipment; bonus space, etc. *Despite this necessity we have reduced the first floor area by 325 square feet.*

The SHNA also asked us to examine the long, two-story continuous walls along the property lines. We have designed numerous breaks in the lengths and heights of the side walls. The longest overall dimension along the east side yard and within 20 feet of the property line is 66 feet, with no single wall exceeding 27 feet in length. The longest overall dimension along the west side yard and within 20 feet of the property line is 77 feet, with no single wall exceeding 28 feet in length.

In accordance with the SHNP Priority #5 we propose to greatly improve the site's ability to infiltrate, store, and release storm-water run-off in a controlled and responsible manner. We've developed a storm water management strategy to improve the surface flow and subterranean transport of released run-off. Generally speaking the site has approximately 12" of top soil over a mix of organics, silt, and clay. The rate of infiltration is very low; soils of this type typically infiltrate less than 1/10<sup>th</sup> of 1 inch of rainfall per hour. This slow rate of infiltration results in a great deal of overland sheet flow that carries a high level of dissolved solids and contaminants into Lake Mendota. Our proposal has four primary objectives:

1. Capture and store "clear" roof run-off for re-use and irrigation.
2. Improve the ability of the site to direct, infiltrate, store, filter, and control the release of on- and off-site overland flow.
3. Adequately deal with emergency storm events.
4. Improve the water quality of Lake Mendota and protect the shoreline.

The plan is implemented through several methods:

- Install a new concrete ribbon curb along Lake Mendota Drive to better direct flows from the south into the existing box culvert that extends along Norman Way.
- Channel overland flow to side-yard drainage swales along the east and west side yards. The east channel is composed of stone. The west channel is lawn. Both channels are designed to slow, cool, infiltrate, and filter the run-off.

- Use permeable surfaces wherever possible, e.g. driveways, aprons, patios, walks, etc. This element alone will “scrub” the run-off passing through and reduce total dissolved solids by 65% and phosphorus by 35%. This is before the additional filtration provided by the storage reservoirs and drainage channels.
- Install sub-surface storage reservoirs beneath all permeable surfaces, and beneath the side yard drainage swales. These reservoirs retain run-off, giving it time to infiltrate into the sub-soil; any excess is filtered and released through underdrains. The east underdrain releases into a bio-retention rain garden. These methods help preserve the site and protect the adjacent properties from flooding.
- Install a vegetated storm water roof over the garage and first floor areas. These roofs have a combined storage capacity of at least 5,021 gallons. Run-off from the second floor roofs will be directed to the storm water roofs for re-use in irrigation. This system has more than enough storage capacity to retain the roof run-off from a 1-1/2” rainfall event.

In accordance with the SHNP Priority #5, which addresses storm-water run-off, we are greatly reducing the amount of impervious surface area. A common metric that is used to measure a site’s ability to infiltrate storm-water run-off is Impervious Surface Ratio (ISR). An impervious surface is any surface that releases rainfall as run-off, e.g. concrete driveways, roofs, etc. ISR is calculated as Impervious Surface Area ÷ Lot Area. The City’s definition of *Lot Coverage* closely approximates ISR. The existing ISR is 0.38. Our management strategy improves the ISR to 0.15, a 60% reduction from the existing value.

A SHNA concern is to preserve view corridors within the side yards. Annex D contains images that illustrate the existing view corridors at the time of the previous proposal; it’s clear that the existing view corridors are obstructed by trees, utility poles, etc. along the west side and by an existing wood fence and a line of evergreens along the east side (these evergreens have since been cleared and no longer obstruct the view corridor). The trees along the west and the majority of the fence along the east side are on the neighboring properties and cannot be removed. New plantings along both sides have been selected for growth habits that minimize visual obstruction at eye-level height and below. Drawing E1.1 illustrates four conceptual perspective views along the east and west property lines. The west view corridor may have some improvement, but the greatest visual obstruction is from the neighbor’s trees. The east corridor will improve, but again the greatest visual obstruction is from the neighbor’s fence.

The *Planning Division Staff Report #37368* identified 10 neighboring properties for evaluating the bulk of the new home. Figure 1 is a table that calculates the Floor Area Ratio (FAR) of the properties and compares them against the median FAR and the proposed development FAR (for both the old and new proposals).

**Figure 1 – Comparison of Bulk with Closest Ten Lakefront Properties\***

House #	Street	Total Area (SF)	Lot Area (SF)	Floor Area Ratio
5426	Lake Mendota Dr	1,780	12,044	0.15
5422	Lake Mendota Dr	2,065	16,962	0.12
5418	Lake Mendota Dr	3,768	26,037	0.14
5412	Lake Mendota Dr	4,981	24,951	0.20
5406	Lake Mendota Dr	3,096	15,180	0.20
5400	Lake Mendota Dr	3,498	12,700	0.28
5212	Harbor Ct	856	3,662	0.23
5206	Harbor Ct	4,293	16,774	0.26
5209	Harbor Ct	2,178	7,257	0.30
5217	Harbor Ct	2,258	4,519	0.50
<b>Median</b>		<b>2,677</b>	<b>13,940</b>	<b>0.22</b>
<i>5404</i>	<i>Lake Mendota Dr (Old)</i>	<i>10,876</i>	<i>23,719</i>	<i>0.46</i>
<i>5404</i>	<i>Lake Mendota Dr (New)</i>	<i>6,968</i>	<i>23,719</i>	<i>0.29</i>

\*Data taken from Planning Division Staff Report, Legistar ID #37368, dated December 7, 2015.

Beyond the data, the SHNA was concerned with the perceived bulk and visual impact of the previous proposal. The new proposal uses architectural design and landscape design to minimize this impact, resulting in a lower, more aesthetically pleasing, less massive appearance. The Contextual Massing Perspectives on Drawing E1.1 place the proposed home in relation to the street, lake, and neighboring properties. Removing the existing detached garage is a key to opening up the front yard and improving the sight lines from the street. Site placement, architectural design, and landscaping help reduce the home's apparent size.

We were asked to reduce the project's size, particularly in regard to the Floor Area Ratio (FAR). We have reduced the FAR from the previous proposal by 37%, and are now within 32% of the median; in fact the proposed FAR of 0.29 compares favorably to other properties in the neighborhood of similar size and value, as shown in Figure 2.

**Figure 2 – Comparison of Bulk with Similar Properties\***

Property	Built	Value	Total Area (SF)	Lot Area (SF)	FAR
4922 Lake Mendota Dr	1994	\$2,100,000	8,892	23,614	0.38
5430 Lake Mendota Dr	2013	\$1,925,000	7,973	18,860	0.42
5434 Lake Mendota Dr	2004	\$1,600,000	6,274	16,533	0.38
5536 Lake Mendota Dr	1999	\$1,548,000	5,696	17,221	0.33
<b>Median</b>		<b>\$1,793,250</b>	<b>7,209</b>	<b>19,057</b>	<b>0.38</b>
<i>5404</i> Lake Mendota Dr	<i>2017**</i>	<i>\$2,484,500**</i>	<i>6,968</i>	<i>23,719</i>	<i>0.29</i>

\*Data taken from City Assessor Website; information current as of 9/13/16.

\*\*These are projections based on the estimated construction schedule and construction cost.

The point of Figure 2 is to show that we're not setting a precedent. The selected properties are not unique in the neighborhood, they are representative. As property values have risen, especially along the lakefront, homes have increased in size and FAR. This is an obvious, predictable (probably inevitable) trend. The *Statement of Purpose for Traditional Residential-Consistent Districts* is a constantly evolving target, as evidenced by the development along Lake

Mendota Drive. The Spring Harbor lakefront is an eclectic mix of new and old, modest and large, traditional and contemporary. There is no single prevailing aesthetic or style. However, our proposal shares certain architectural elements and features with other homes in the neighborhood (Annex E), such as flat or low-slope roofs, varied roof and floor heights, angled wall intersections, etc.

The SHNA requested a reduction in the overall height of the project. We have lowered the first floor elevation from 860.75 feet to 855.30 feet, a 5.45 foot drop. We have lowered the highest point of the highest roof from 34.00 feet to 29.33 feet, a 4.70 foot drop; note that this measures the highest point of the new barreled roof, which is a small architectural feature - the main roof is much lower at 23.75 feet. Using flat roofs for the majority of the home helps reduce the actual and apparent heights. Drawing E1.2 illustrates the height in relation to those of the adjacent properties.

### Conclusion

The project team has worked diligently to prepare a proposal that provides an attractive, functional home that adds value to the neighborhood. The concerns raised by the Spring Harbor Neighborhood Association members have prompted a dialog within the team that has driven our desire to improve our proposal in every respect. We appreciate this opportunity place our proposal before the Plan Commission for consideration.

Questions regarding this proposal and submitted materials may be directed to the Architectural Project Manager:

Robert Lackore  
Bouril Design Studio, LLC  
6425 Odana Rd, Suite 2  
Madison WI 53719  
www.bourildesign.com  
608-833-3400  
robl@bourildesign.com

ANNEX A – NOTIFICATIONS

9/9/2016

•••

Robert Lackore  
Bouril Design Studio, LLC  
6425 Odana Rd, Suite 2, Madison WI 53719

Mark Clear  
Alder, District 19

Sir,

On behalf of David Sheriff and Mary Morgan I would like to notify your District of a new single-family residence proposed for 5404 Lake Mendota Drive. A previous proposal was presented to the District in 2015; the revised proposal differs substantially and addresses several issues identified by the Spring Harbor Neighborhood Association and its members.

The scope of work includes:

- Removal of the existing single family home and detached garage.
- Erection of a new single family home with attached garage.

Features of the new proposal include:

- A new two-story home of unique design.
- Custom landscape design.
- A comprehensive storm-water management strategy.

Our design team includes:

- Bouril Design Studio, LLC. – architecture.
- ZDA, Inc. – landscape design.
- MSA Professional Services – civil engineering and storm-water management.

We will submit the Land Use Application by 10/12/16 for consideration by the Plan Commission on 11/21/16. It is our intent to provide David, Mary, and the Spring Harbor neighborhood with a unique, quality project of lasting value.

Sincerely,



Robert Lackore  
Project Manager  
Bouril Design Studio, LLC

9/9/2016

•••

Robert Lackore  
Bouril Design Studio, LLC  
6425 Odana Rd, Suite 2, Madison WI 53719

Aaron Crandall  
President, Spring Harbor Neighborhood Association

Sir,

On behalf of David Sheriff and Mary Morgan I would like to notify the Spring Harbor Neighborhood Association of a new single-family residence proposed for 5404 Lake Mendota Drive. A previous proposal was presented to the Association in 2015; the revised proposal differs substantially and addresses several issues identified by the Association and its members.

The scope of work includes:

- Removal of the existing single family home and detached garage.
- Erection of a new single family home with attached garage.

Features of the new proposal include:

- A new two-story home of unique design.
- Custom landscape design.
- A comprehensive storm-water management strategy.

Our design team includes:

- Bouril Design Studio, LLC. – architecture.
- ZDA, Inc. – landscape design.
- MSA Professional Services – civil engineering and storm-water management.

We will submit the Land Use Application by 10/12/16 for consideration by the Plan Commission on 11/21/16. It is our intent to provide David, Mary, and the Spring Harbor neighborhood with a unique, quality project of lasting value.

Sincerely,



Robert Lackore  
Project Manager  
Bouril Design Studio, LLC

**Robert Lackore**

---

**From:** noreply@cityofmadison.com  
**Sent:** Friday, September 9, 2016 12:32 PM  
**To:** robl@bourildesign.com  
**Subject:** City of Madison Demolition Notification Approved

Dear applicant,

Please be advised that your demolition permit notification message was sent to all interested parties registered with the City of Madison on September 9, 2016 at 12:30 PM. Your demolition permit application can be filed with the Zoning Office, Room LL-100 of the Madison Municipal Building, 215 Martin Luther King Jr. Blvd. on the next business day following 30 or 60 days of the posting of this notification message based on the year the building or buildings were constructed. Please consult the annual Plan Commission schedule for application deadline days and the corresponding Plan Commission hearing dates. For more information on filing your Plan Commission application for a demolition permit, please contact the City of Madison Planning Division at (608) 266-4635.

**Comments:**

If you have not discussed this request with staff from Planning and Zoning, please contact 266.4635 to schedule a meeting.

ANNEX B – STATE HISTORIC PRESERVATION OFFICE ASSESSMENT

**Robert Lackore**

---

**From:** CHIP BROWN <chip.brown@wisconsinhistory.org>  
**Sent:** Monday, August 29, 2016 10:04 AM  
**To:** robl@bourildesign.com  
**Cc:** Amy Scanlon (ascanlon@cityofmadison.com)  
**Subject:** RE: Burial Site Locations - Spring Harbor Area

Hello Mr. Lackore,

Thank you very much for his updated information. My review of your project materials is complete; we have no concerns with this action. The archeological site that you may be affecting through project implementation is not a human burial site; therefore the State's human burial site preservation law at Wis. Stat. § 157.70 does not apply. Because there is no State or Federal agency permitting, financing, or other involvement required, we have no further review authority under any additional State or Federal historic preservation laws.

I appreciate your forwarding project materials to me for review. By copy of this message, I am notifying Amy Scanlon of the City of Madison's Preservation Commission of these findings.

With question, please contact me. Good luck with your project! Thank you very much for your attention to this matter.

Sincerely,

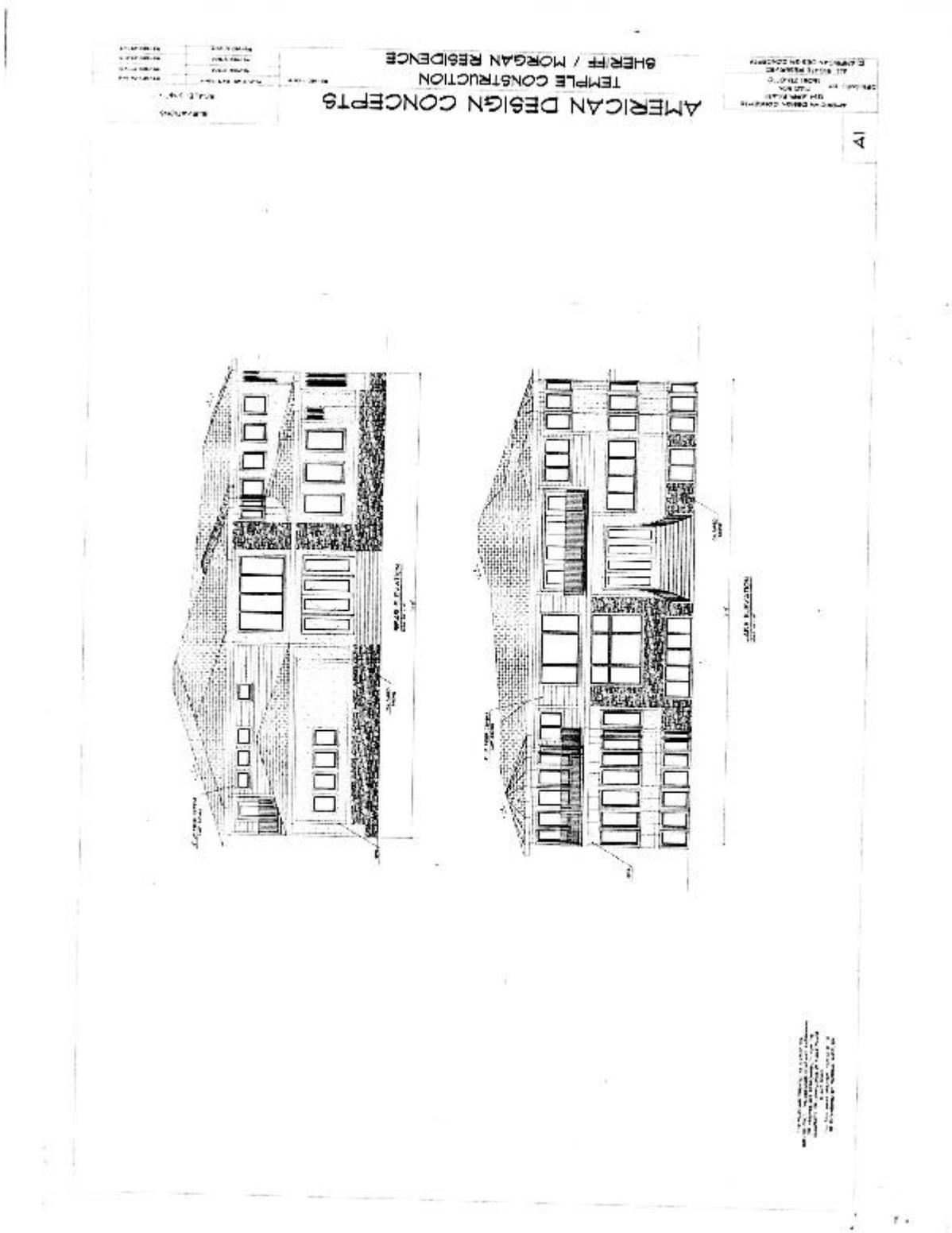
Chip Brown

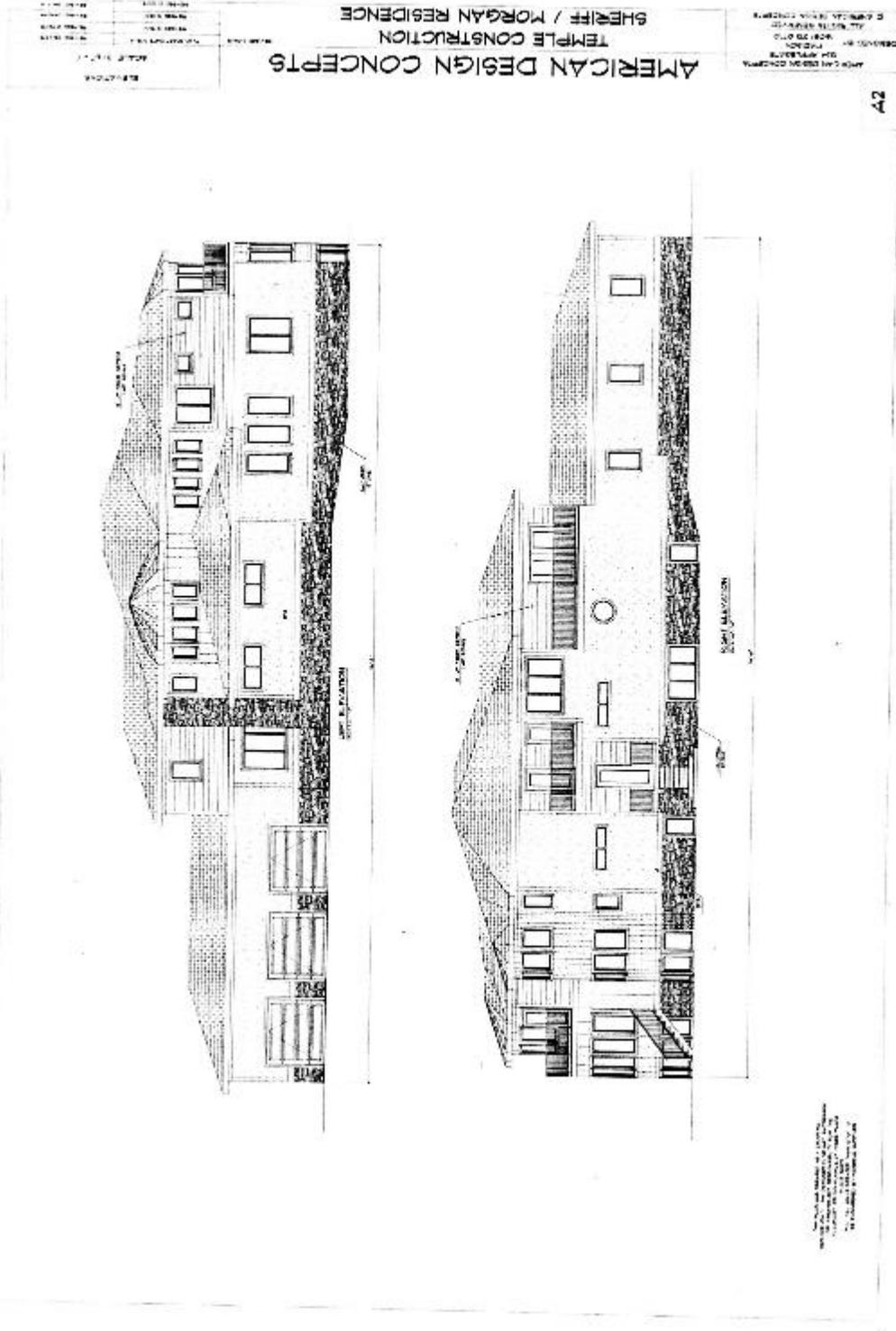
**Chip Harry L. Brown III, J.D.**  
Senior Compliance Officer  
State Historic Preservation Office  
(608) 264-6508 (O)

Wisconsin Historical Society  
816 State St.  
Madison WI 53706

**Wisconsin Historical Society**  
[Collecting, Preserving, and Sharing Stories Since 1846](#)

**ANNEX C – AMERICAN DESIGN CONCEPTS DRAWINGS (PREVIOUS PROPOSAL)**





ANNEX D – EXISTING VIEW CORRIDORS ALONG THE PROPERTY LINES



*View down the west property line (between 5404 and 5406 Lake Mendota Drive)*



*View down the east property line (between 5405 and 5400 Lake Mendota Drive)*



ANNEX E – SHARED ARCHITECTURAL ELEMENTS AND FEATURES



*1729 Camelot Drive. This Modern home features flat roofs and stream-lined geometry.*



*5040 Lake Mendota Drive. This Transitional home features mixed materials and a "popped up" second-story roof form.*



*5046 Lake Mendota Drive. This Modern home varies the height of the roofs to create interest and to delineate the interior space using the exterior form.*



*5457 Lake Mendota Drive. Another Modern home that features flat roofs and discrete, horizontal elements and forms.*



*5510 Lake Mendota Drive. More flat roofs and strong horizontal geometry.*



*5521 Lake Mendota Drive. A home in the Modern style: varied roof heights and projections are characteristic of the style.*



*5020 Merrill Springs Road. This unique, elegant attached garage doesn't detract from the home's overall style or curb presence.*



*5130 Minoqua Crescent. Though there is no obvious connection between this Dome home and our proposal, it demonstrates the eclectic quality of the Spring Harbor neighborhood.*



*5105 Spring Court. This home demonstrates a that mixing styles can work.*



*5110 Spring Court. A Transitional home with traditional exterior millwork mixed with Contemporary forms.*



*5013 Tomahawk Trail. A flat roof and effective use of a color and material transition that complements the simple architecture.*



*5122 Tomahawk Trail. Landscaping, a low slope roof, and a horizontal ribbon of glass reduce the visual impact of this home.*

**ANNEX F – CITY ASSESSOR PARCEL INFORMATION**

**City of Madison Property Information**

**Property Address:** 5404 Lake Mendota Dr

**Parcel Number:** 070918104096

**Information current as of:** 10/8/16 01:00AM

**OWNER(S)**

SHERIFF, DAVID B  
MARYROSE N MORGAN  
1213 N HIGH POINT RD  
MIDDLETON, WI 53562-3681

**REFUSE COLLECTION**

District: 10A

**SCHOOLS**

District: Madison  

- Crestwood
- Jefferson
- Memorial

**CITY HALL**

Aldermanic District: 19  
Alder Mark Clear

**PROPERTY VALUE**

Assessment Year	Land	Improvements	Total
2015	\$801,500	\$183,000	\$984,500
2016	\$801,500	\$183,000	\$984,500

**2015 TAX INFORMATION**

Net Taxes:	\$23,633.85
Special Assessment:	\$0.00
Other:	\$0.00
<b>Total:</b>	<b>\$23,633.85</b>

**PROPERTY INFORMATION**

Property Use:	Single family	Property Class:	Residential
Zoning:	TR-C1	Lot Size:	23,719 sq ft
Frontage:	66 - Lake Mendota Dr	Water Frontage:	YES
TIF District:	0	Assessment Area:	82

**RESIDENTIAL BUILDING INFORMATION**

**EXTERIOR CONSTRUCTION**

Home Style:	Contemporary	Dwelling Units:	1
Stories:	1.0	Year Built:	1948
Exterior Wall:	Wood		
Foundation:	Concrete		
Roof:	Asphalt	Roof Replaced:	1948
Garage 1:	Attached	Stalls:	2.0
Garage 2:	Detached	Stalls:	2.5
Driveway:	Concrete	Shared Drive:	NO

**INTERIOR INFORMATION**

Bedrooms:	2	Full Baths:	2
-----------	---	-------------	---

Fireplace:	2	Half Baths:	1
<b>LIVING AREAS (Size in sq ft)</b>			
Description:	Living Area:	Total Living Area:	2,660
1st Floor:	2,660		
2nd Floor:	0		
3rd Floor:	0		
Above 3rd Floor:	0		
Attic Area:	Finished: 0		
Basement:	Finished: 0	Total Basement:	0
Crawl Space:	0		
<b>OTHER STRUCTURES (Size in sq ft)</b>			
Open Porch:	165		
Patio:	455		
Deck:	486		
<b>MECHANICALS</b>			
Central A/C:	YES		

**Property Information Questions?**

**Assessor's Office**  
210 Martin Luther King, Jr. Boulevard, Room 101  
Madison, Wisconsin 53703-3342  
Phone: (608) 266-4531  
Email: [assessor@cityofmadison.com](mailto:assessor@cityofmadison.com)