

# HILLDALE INCLUSIONARY ZONING APPLICATION

## PART 1 - DEVELOPMENT INFORMATION:

**Project or Plat** HILLDALE - PHASE II  
**Project Address:** 702 N. MIDVALE; MADISON **Project Area (in acres):** 37  
**Developer:** Joseph Freed & Associates LLC **Representative:** Domenic Lanni  
**Street Address:** 220 N Smith St. Suite 300 **City/State:** Palatine, IL **Zip:** 60067  
**Telephone:** 847-215-5430 **Fax:** 847-215-5282 **Email:** dlanni@jfreed.com  
**Agent, If Any:** \_\_\_\_\_ **Company:** \_\_\_\_\_  
**Street Address:** \_\_\_\_\_ **City/State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_  
**Telephone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **Email:** \_\_\_\_\_

## 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	—	—	—	—	—	NA
Duplexes	—	—	—	—	—	NA
Multi-Family	201	—	37	—	238	NA
<b>TOTAL</b>	<b>201</b>	<b>—</b>	<b>37</b>	<b>—</b>	<b>238</b>	<b>NA</b>

## 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	—	—	—	—	—	37	37
Anticipated Sale Price	—	—	—	—	—	TBD	—
Rental Units	30%	40%	50%	60%	70%	80%	Total
Number at Percent of AMI	—	—	—	—	—	—	—
Maximum Monthly Rent Price	—	—	—	—	—	—	—

## 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:	—	50	149	4	—	—	18	189	—	—
Minimum Floor Area:		719	860	1230			719	860		
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 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 <u>Inclusionary Unit Reserve Fund</u> 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 <u>Inclusionary Unit Reserve Fund</u> 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 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:**

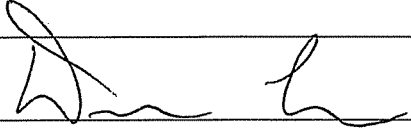
The signer shall attest that this application has been completed accurately and includes all requests for incentives or waivers; that they have attended both required pre-application staff meetings and given the required notice to the district alderperson and neighborhood association(s) prior to filing 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 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		

CONTINUE →

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

- The applicant discussed this development proposal with representatives from the Planning Unit, Zoning Administrator and Community Development Block Grant Office on: → 10/5/06
- The applicant presented a preliminary development plan for this project to the Interdepartmental Review Staff Team on: → 10/5/06
- The applicant notified Alderperson GRUBER of District 11 of this development proposal in writing on: → 6/16/05 & 9/25/06
- The applicant also notified Michael hawton of the HFNA neighborhood in writing on: → 6/16/05 & 9/25/06
- 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** 10/10/06

**Printed Name** Domenic Lanni **Phone** 847-215-5430

HILLDALE CENTER 702 N. MIDVALE BLVD.  
INCLUSIONARY ZONING NARRATIVE

The Developer- Joseph Freed and Associates LLC intends to develop 238 dwelling units within the portion of its Hilldale property bounded by Segoe, University, Frey and the Mall entrance.

Characteristics, Distribution and Schedule for construction of IZ units

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- One – 11 story tower with 10 floors of residential use containing a majority mix of one and two bedroom homes and a minor portion of three bedroom homes.
- One – 9 story tower with 7 floors of residential use containing a majority mix of one and two bedroom homes designed as lofts.
- Four attached units with three stories acting as live-work lofts.
- All units will be for purchase
- The 11 story tower is proposed to be started first quarter of 2007 and completed by third quarter of 2008.
- The 9 story tower and live-work units would be started third quarter of 2008 and completed fourth quarter of 2009.

Marketing Plan and Organization of the Condominium Association

The Developer will organize and implement the marketing plan for the IZ units throughout the project. The Developer intends to utilize a third party organization experienced with this type of marketing effort. This organization would be integrated into the Developer's sales staff and would have a presence in our sales office.

Pricing of IZ units will be according to the guidelines and requirements of Madison codes and ordinances. The Developer will look to reserve a 20% area excluding the IZ units and will work with staff to provide appropriate material.

The condominiums will be organized under the laws of the State of Wisconsin and the City of Madison. Local legal advisers have been engaged and preliminary discussions have taken place on the basic framework and unique provisions.

HILLDALE CENTER 702 NORTH MIDVALE BLVD.  
IZ UNIT MAP - 144 unit building

Typical Floor Plate Floors 2-8

2 bed/2 bath	2 bed/2 bath
1 bed/1 bath	2 bed/1 bath
1 bed/1 bath (IZ) Floors 2 thru 8	1 bed/1 bath
2 bed/1 bath	2 bed/1 bath (IZ) Floors 2 thru 4
2 bed/1 bath (IZ) Floors 2 thru 8	2 bed/1 bath
2 bed/1 bath	1 bed/1 bath (IZ) Floors 2 thru 4
2 bed/1 bath	1 bed/1 bath
2 bed/2 bath	2 bed/2 bath

NORTH

Typical Floor Plate Floors 9

2 bed/2 bath/Den	2 bed/2 bath/Den
2 bed/2 bath	2 bed/2 bath
1 bed/1 bath (IZ) Floor 9	1 bed/1 bath
2 bed/1 bath	2 bed/2 bath
2 bed/1 bath (IZ) Floor 9	2 bed/1 bath
2 bed/2 bath	2 bed/2 bath/Den

Total Units: 144  
IZ Requirement: 15%  
IZ Units 22

Typical Floor Plate Floors 10-11

2 bed/2 bath/Den	3 bed/2 bath
2 bed/1 bath	2 bed/2 bath
1 bed/1 bath	2 bed/1 bath
2 bed/2 bath	2 bed/2 bath
2 bed/2 bath/Den	3 bed/2 bath

Building Elevation

Floor 11	
Floor 10	
Floor 9	
Floor 8	
Floor 7	
Floor 6	
Floor 5	
Floor 4	
Floor 3	
Floor 2	
Ground Floor	Commercial

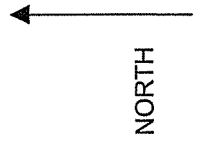
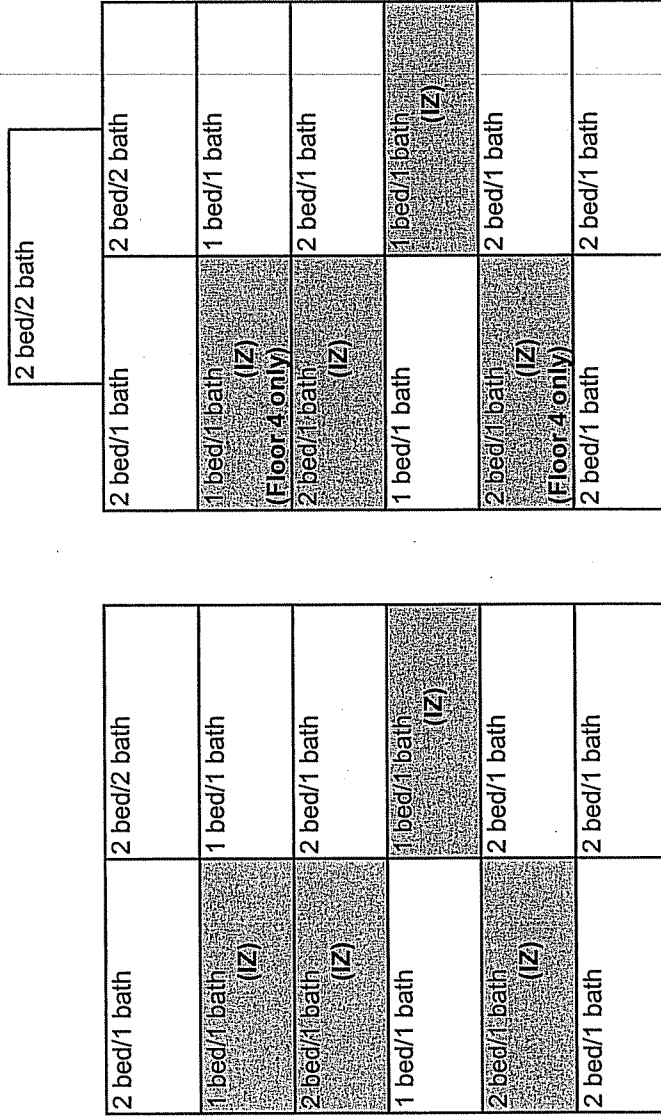
NORTH

HILDALE CENTER 702 NORTH MIDVALE BLVD.  
 IZ UNIT MAP - 90 unit building

Building Elevation

Typical Floor Plate Floors 4-9

Typical Floor Plate Floors 3



Total Units: 90  
 IZ Requirement: 15%  
 IZ Units: 14