

**JEFFERSON COUNTY ECONOMIC DEVELOPMENT CONSORTIUM (JCEDC)
& THRIVE ED BOARD AGENDA
REVISED**

**Thursday, December 19, 2024
8:00 a.m. - Continental Breakfast / Networking
8:30 a.m. - Meeting**

**UW Extension/Workforce Development, 864 Collins Road, Room 8, Jefferson, WI 53549
AND VIA Zoom**

Zoom Link: <https://us06web.zoom.us/j/86431259008?pwd=U2FveTM4TTUyTDF1dzJUcGp2SGpZZz09>

Meeting ID: 864 3125 9008

Passcode: 417932

Dial by your location: 1-309-205-3325

Board Members – Jefferson County Economic Development Consortium (JCEDC)

Rebecca Houseman - City of Fort Atkinson, Drake Daily– City of Lake Mills, Timothy Freitag – City of Jefferson, Everett Butzine– City of Waterloo, Emily McFarland – City of Watertown, Taylor Zeinert – City of Whitewater, Lisa Moen – Village of Cambridge, Kyle Ellefson - Village of Johnson Creek, Kathy Weiss – Village of Palmyra, County Supervisor Bruce Degner, County Supervisor Amanda Truax, County Supervisor Karl Zarling

Board Members – ThriveED

David Schroeder, Kevin Kaufman Casey Malesevich, Tom Dehnert, Scott Lausten, Don Lunak, Sr., Matt Mauthe, Andy Nelson, Kevin Paynter, Nate Salas, Stewart Wangard, Rebecca Houseman, Everett Butzine, Elizabeth Thelen, Tina Crave, Kellie Karpinski, Richard Keddington, Shawna Marquardt, James Nelson, Josiah Gamroth

- I. Call To Order
- II. Roll (Establish a quorum)
- III. Certificate of Compliance with Open Meeting Laws
- IV. Approval of Agenda – December 19, 2024
- V. Approval of JCEDC/ThriveED Minutes – August 22, 2024
- VI. Public Comment – Members of the public who wish to address the board on specific agenda items must register their request at this time.
- VII. Election of ThriveED officers for 2025
- VIII. JCEDC/ThriveED Reports
 - a. Staffing Update
 - i. Financial Partnership Manager
 - ii. Program Assistant
 - b. Discussion Regarding Strategic Plan Update
 - c. Discussion of Milwaukee 7 (M7) Partnership
 - d. Discussion and Approval of continuation of Michael Best Strategies Contract
 - e. Discussion and Approval of Finance Reports for JCEDC
 - f. Discussion and Approval of Finance Reports for ThriveED
 - g. Discussion - JCEDC 2025 Budget
 - h. Discussion and Approval of ThriveED 2025 Budget
 - i. Thriving Business
 - i. Presentation: Opportunity Pipeline
 - j. Diverse Housing
 - i. Report: HUD Audit
 - ii. Report: Jefferson County Housing Counseling
 1. Prepurchase

- 2. Rehab
 - iii. Report: Live Local Development Fund (LLDF)
 - k. Activated Workforce
 - i. Report: JCHRMA Pinnacle Award
 - l. Trust & Partnerships
 - i. Report: Recent Presentations / Community Involvement
 - 1. Jefferson Rotary Meeting
 - 2. Fort Atkinson Rotary Presentation
 - 3. Cordia Energy
 - 4. WEDA Best Practices Conference – Attraction Panel
 - 5. WI Real Estate & Economic Outlook Conference – Housing Panel
 - 6. Watertown Plan Commission Discussion
 - 7. Mid-America EDC Award – Kikkoman Project of the Year
 - ii. Community Discussion
 - 1. JCEDC board members are encouraged to share a brief update about their community, initiatives and/or challenges
 - iii. Thrive Board Discussion
 - 1. Thrive board members are encouraged to share a brief update about their company, initiatives and/or challenges
 - m. General Updates
 - i. Upcoming Events
 - 1. February 12, 2025 – Conversations with ThriveED
 - 2. April 16, 2025 – Biz Times - Madwaukee 2050
 - 3. April 30 – May 1, 2025 – Wisconsin Rural Partners Annual Summit – Fort Atkinson

IX. Adjournment.

Our Vision Statement is: JCEDC / ThriveED will lead change necessary to support economic growth in Greater Jefferson County that results in healthy, thriving, and growing communities.

Our Mission Statement is: JCEDC / ThriveED will engage the public and private sectors in actions focused on attracting and supporting business growth that benefits the residents and communities in the Greater Jefferson County area.

**Jefferson County Economic Development Consortium (JCEDC) and ThriveED
Board of Directors Meeting
August 22, 2024 – Meeting held in person and via Zoom.**

Zoom Link: <https://us06web.zoom.us/j/86431259008?pwd=U2FveTM4TTUyTDF1dzJUcGp2SGpZZz09>
Meeting ID: 864 3125 9008
Passcode: 417932

Board Members - JCEDC

Rebecca Houseman - City of Fort Atkinson, Drake Daily – City of Lake Mills, Timothy Freitag – City of Jefferson, Everett Butzine – City of Waterloo, Emily McFarland – City of Watertown, John Weidl– City of Whitewater, Lisa Moen – Village of Cambridge, Kyle Ellefson - Village of Johnson Creek, Kathy Weiss – Village of Palmyra, County Supervisor Bruce Degner, County Supervisor Amanda Truax, County Supervisor Karl Zarling

Board Members – ThriveED

David Schroeder, Kevin Kaufman, Casey Malesevich, Tom Dehnert, Scott Lausten, Don Lunak, Sr., Matt Mauthe, Andy Nelson, Kevin Paynter, Nate Salas, Stewart Wangard, Rebecca Houseman, Everett Butzine, Paul Ambrose, Tina Crave, Kellie Karpinski, Richard Keddington, Shawna Marquardt, James Nelson, Ben Wehmeier

I. Call to Order - Meeting called to order at 8:30 am.

II. Roll Call – Quorum Established

- JCEDC Board Members Present:
Rebecca Houseman - City of Fort Atkinson, Drake Daily– City of Lake Mills, Everett Butzine– City of Waterloo, Emily McFarland – City of Watertown, Taylor Zeinert – City of Whitewater, Tammy Jordan – Village of Cambridge, Kyle Ellefson - Village of Johnson Creek, Kathy Weis – Village of Palmyra, County Supervisor Bruce Degner, County Supervisor Amanda Truax, County Supervisor Karl Zarling
- ThriveED Board Members Present
Tina Crave, David Schroeder, Tom Dehnert, Kevin Kaufman, Elizabeth Thelen, Kellie Karpinski, Casey Malesevich, Matt Mauthe, Andy Nelson, Kevin Paynter, Nate Salas, Rebecca Houseman, Everett Butzine, Shawna Marquardt, Ben Wehmeier
- Staff Present: Julie Olver, Deb Reinbold, RoxAnne Witte
- Others Present: Mason Becker

III. Certification of compliance with Open Meeting Law Requirements

Staff certified compliance for the agenda dated August 22, 2024.

IV. Approval of Agenda

Zeinert/Salas moved to approve agenda as presented. Motion passed.

V. Approval of Minutes

Crave/Zeinert moved to approve July 27, 2024 JCEDC & ThriveED minutes as printed. Motion passed.

VI. Public Comments – None

VII. Discussion Regarding Updating Strategic Plan

Reinbold is working on interviewing facilitators for our ½ day retreat to update the current plan.

VIII. JCEDC/ThriveED Reports

a. Discussion and Approval of Finance Reports for JCEDC

Salas/Ellefson moved to approve the Finance Reports for Jefferson County Economic Development as printed. Motion passed.

b. Discussion – JCEDC 2025 Budget

Reinbold presented the JCEDC 2025 budget that will be presented to the county finance committee for approval.

c. Discussion and Approval of Finance Reports for ThriveED

Schroeder/Thelen moved to approve the Finance Reports for ThriveED as printed. Motion passed.

d. Board – Committee Updates

i. Discussion: Board Meeting Dates

Reinbold will send out a survey to determine what day works best for our JCEDC/ThriveED board meetings.

Update: Committees

Finance, Audit & Compliance – no report.

Ad Hoc Committee – Housing – Zarling lead an open discussion on what the board felt this committee should be working on.

e. Staffing Updates.

Reinbold reported that there were two applicants that will be contacted for in person interviews. No action taken.

f. Thriving Business

i. Presentation: Opportunity Pipeline

Reinbold gave an update on projects in the Opportunity Pipeline. No action taken.

ii. Report - Media

Reinbold updated the board on the articles that will be appearing in the Site Selectors Magazine and Biz Times. No action taken.

iii. Update: Michael Best Strategies

The contract has been signed and work will start in September. No action taken.

iv. Update: Utilities

Reinbold updated the board on the conversations/meetings that she has been having with the utility companies in Jefferson County. No action taken.

g. Diverse Housing

i. Report: Jefferson County Housing Counseling

Prepurchase – Witte updated the board on the homebuyer activity for the year. No action taken.

Rehab – Witte updated the board on the City of Watertown’s rehab program. No action taken.

ii. Report: Live Local Development Fund (LLDF)

Reinbold updated the board on meetings that are being held with potential investors and commitments that have been received to date. No action taken.

h. Activated Workforce

i. Update: Jefferson County SHRM: Employer- “How to Hire” International Workers Conference

Reinbold updated the board on the event that was held on August 6, 2024. No action taken.

ii. Report: WDBSCW & Madison College

Update was received on programs that they are looking to put together for businesses to train their current and future workforce. No action taken.

i. Trust & Partnership

i. Report: Recent Presentations

Presentations given to WEDC – Rural Housing Community, Jefferson School District, Wisconsin Power Partners, and Edgerton Chamber of Commerce. Staff also participated in podcasts for Fort Healthcare and Discover Wisconsin. Future presentations included the WEDA Best Practices Conference and the UW Madison Graaskamp Center for Real Estate – 2024 Wisconsin Real Estate & Economic Outlook Conference. No action taken.

ii. Community Discussion

JCEDC board members are encouraged to share a brief update about their community, initiatives, and/or challenges.

Updates were given on community initiatives, current projects, and challenges. No action taken.

iii. Thrive Board Discussion

THRIVE board members are encouraged to share a brief update about their company, initiatives and/or challenges.

Updates were given on business activity, initiatives, and challenges. No action taken.

j. General Updates

i. Upcoming Events

- September 26, 2024 – 8:30 am - JCEDC/ThriveED Executive Committee Meeting
- October 10, 2024, 8:00 am – ThriveED Annual Meeting
- November 6, 2024 – Conversations with ThriveED – Location TBD
- April 30-May 1, 2025 – Wisconsin Rural Partners Annual Summit -Fort Atkinson

IX. Adjournment

There being no further business to come before the JCEDC or ThriveED board for consideration at this time Schroeder/Salas moved to adjourn. The meeting adjourned at 9:51 am.

Minutes prepared by:
RoxAnne L. Witte
Program Specialist, Jefferson County Economic Development Consortium

ThriveED / JCEDC Strategic Plan Check-in Summary

Business Retention, Expansion & Attraction	Placemaking	Workforce Participation	Strategic Support, Awareness & Advancement
<ul style="list-style-type: none"> • Business Familiarization Tours • Industry Clusters <ul style="list-style-type: none"> ○ Talent ○ Automation ○ Supply Chain • BRE Visits <ul style="list-style-type: none"> ○ Support Existing Business Expansions ○ Partner with Municipalities • Align Efforts with WMC • Identify Sites for Growth <ul style="list-style-type: none"> ○ Dynamic Map w/ Layers Including Utilities ○ Shovel Ready ○ Property Control 	<ul style="list-style-type: none"> • Housing <ul style="list-style-type: none"> ○ Update Market Studies ○ Incentives <ul style="list-style-type: none"> ▪ Housing Development ▪ Home Renovation ▪ Upgrade Housing Stock ▪ Housing Affordability ○ Creative Path to Home Ownership <ul style="list-style-type: none"> ▪ Interest Rates ▪ Downpayment Assistance ▪ Single Family TIF ○ P3 Partnership Model – Beaver Dam & Jackson ○ Involve Businesses in Housing Development ○ Municipal Ordinances <ul style="list-style-type: none"> ▪ Diverse Housing Stock <ul style="list-style-type: none"> • Row Housing • Duplexes • Placemaking <ul style="list-style-type: none"> ○ Brownfield Remediation ○ Revitalize Downtowns ○ Tourism in Economic Development ○ Quality of Life ○ Culture ○ Diversity ○ Planned Growth – Balance with Ag Land and Rural Nature 	<ul style="list-style-type: none"> • Walworth Propel Inspire Program • High School Engagement as a County vs. Individual Schools • Upskill Workforce <ul style="list-style-type: none"> ○ Identify Business Needs ○ Connect w/ Schools / Workforce Development Board • Transportation <ul style="list-style-type: none"> ○ Van Pool ○ Partner with Employers ○ County Brown Cab Contract • Immigration <ul style="list-style-type: none"> ○ Embrace & Support ○ Path to Work • Employer of Choice <ul style="list-style-type: none"> ○ Management Tracks for Career Mobility ○ Hours <ul style="list-style-type: none"> ▪ PT Career Options <ul style="list-style-type: none"> • “School Shift” (8:15 – 2:45) • Job Sharing ○ Flexibility ○ Values ○ Wages (vs. Cost of Living) ○ Child Care ○ Work / Life Balance • Child Care <ul style="list-style-type: none"> ○ Affordability ○ Availability • Job Board 	<ul style="list-style-type: none"> • Awareness & Communication <ul style="list-style-type: none"> ○ ThriveED / JCEDC = Best Practice ○ Brand I-94 Corridor <ul style="list-style-type: none"> ▪ MadRep & M7 ○ Brand Jefferson County ○ Market as a Complete Community ○ Promote our Wins ○ Dynamic Dashboard (like Janesville) • Influence / Educate <ul style="list-style-type: none"> ○ Target Councils, Plan Commissions, School Districts, Business Leaders, Lenders, Brokerages, Faith-Based Groups ○ Mythbusters <ul style="list-style-type: none"> ▪ Impact of Development & Housing <ul style="list-style-type: none"> • Impact Analysis ○ Master Planning ○ Zoning ○ Impact of Lack of Development ○ Robust Showing of Support – Develop Model Statements ○ Housing Summit– Focus on Storytelling & Testimonials to combat NIMBY’ism <ul style="list-style-type: none"> ▪ Housing = Workforce ▪ Need – Workforce Commute ▪ TIF ▪ Developer Financing ▪ Local Wages vs. Rent Rates • Community “Best Practices” <ul style="list-style-type: none"> ○ Provide Templates for Communities ○ Fewer Regulations ○ Documented & Streamlined Process for Businesses ○ Make Zoning Easy ○ Easy / Flexible Permitting ○ Housing ○ Housing Finance Models ○ Childcare ○ Other Business Challenges • Michael Best Strategies <ul style="list-style-type: none"> ○ Infrastructure ○ DOT • Host Conferences <ul style="list-style-type: none"> ○ WI Rural Partners ○ Industry Specific • “North Star” – Relationships with Developers & Communities • Share Available Resources w/ Municipalities • Explore Regional Plan Commission

June 3, 2024

VIA EMAIL:

Deborah Reinbold
Executive Director
Jefferson County Economic Development Consortium
864 Collins Rd, Ste 111
Jefferson, WI 53549

Dear Ms. Reinbold:

We are pleased to confirm our engagement to provide Jefferson County Economic Development Consortium (JCEDC) with Government Relations assistance to promote economic development in Jefferson County. We have performed a conflict-of-interest check and determined that we have no current conflicts of interest that would affect our representation of JCEDC in connection with this matter. Michael Best Strategies LLC offers a full range of services in areas such as government relations, strategic political relationships, public affairs, and business and community solutions, and we are available to represent JCEDC in any other matters upon your request. If you would like us to represent you on other matters, such representation should be the subject of additional discussions.

At the outset, it is necessary for me to clearly communicate that you have retained Michael Best Strategies LLC. Michael Best Strategies LLC is affiliated with and owned in part by the law firm of Michael Best & Friedrich LLP. Your retention of Michael Best Strategies LLC does not constitute or otherwise create an attorney-client relationship with the law firm of Michael Best & Friedrich LLP. Additionally, Michael Best Strategies LLC cannot and will not provide any legal services as part of this representation. If during the course of your representation by Michael Best Strategies LLC it becomes apparent that your interests will be furthered by the provision of legal services, you may at your discretion choose to enter into an attorney-client relationship with Michael Best & Friedrich LLP. However, your retention of Michael Best Strategies LLC does not require you to use Michael Best & Friedrich LLP for any such legal services.

We have determined that an important factor in maintaining the trust and confidence of our clients is clearly communicating the scope of our professional engagement and our procedures for billing and payment. This letter attempts to fulfill the same. Please review it carefully and if you have no questions, sign where indicated below and return it to your Michael Best Strategies LLC contact. If you have any questions, please do not hesitate to contact your Michael Best Strategies LLC contact.

SCOPE OF ENGAGEMENT AND EXPECTATIONS

You have asked us to represent JCEDC in relation to economic development in Jefferson County including engaging key decision makers at WE Energies, the Wisconsin State Legislature, and Gov. Evers Administration, as well as Congressman Scott Fitzgerald and Sen.

Tammy Baldwin to promote the energy readiness of WE Energies communities in Jefferson County. The efforts will be directed at ensuring WE Energies communities in Jefferson County can successfully compete for, and land new high energy load projects, as well as directed at making the food and beverage innovation campus and other projects in the pipeline a success. Strategies will:

WE Energies

- Identify and advocate for investment opportunities for WE Energies within Jefferson County to allow Jefferson County to compete for high energy load projects.
- To the extent WE Energies assistance is also necessary to make the food and beverage innovation campus a success, or other projects in the pipeline, we will facilitate those items, as well.

State and Federal Government

- Educate local lawmakers, the Governor, and state agency heads and key personnel on the tools needed to bring the food/bev innovation campus to fruition and capitalize on other high energy load projects moving forward, and potential improvements needed with existing state resources to provide more utility, or ease of use, at the local economic development level. This work would attempt to create solutions that can be implemented without a law change and, where a law change is necessary, build the bipartisan foundation for a 2025 state budget lobbying effort.
- Work with Congressman Fitzgerald and Senator Baldwin on a potential earmark for local infrastructure.

FEES, COSTS, BILLING AND PAYMENT COSTS OF COLLECTION

JCEDC shall pay Michael Best Strategies LLC in equal installments of \$5,000 per month for the first 90 days. The initial term of this engagement begins on July 1, 2024, through September 30, 2024. If extended to include a 2025 lobbying effort, the price would increase to \$7,500 per month beginning on October 1, 2024. This Agreement shall automatically renew for successive one-month terms on the same payment terms until such time that the Agreement is terminated by either Party giving the other Party 30-days written notice of termination. Upon such termination, JCEDC shall pay Michael Best Strategies LLC the amount due for the full calendar month within which the termination occurs.

In addition, JCEDC shall reimburse Michael Best Strategies LLC for all direct out-of-pocket expenses including transportation, hotel, meals, and registration or licensing fees (including lobbying fees). Michael Best Strategies LLC agrees to provide JCEDC a detailed invoice itemizing each reimbursable expense. JCEDC shall have the right to audit the record of such expenses upon reasonable request.

Invoices are generated monthly and sent approximately one month in advance of services being provided. All invoices are payable within 30 days of the invoice date. All payments shall be made within the agreed time period, without any deduction or set-off for any reason whatsoever, unless specified otherwise in the invoice.

In the event of non-payment of any fees or charges invoiced by Michael Best Strategies LLC by the due date specified, Michael Best Strategies LLC shall give notice of non-payment to JCEDC, and, in such an event, JCEDC shall have the right to pay the unpaid fee within thirty (30) days after receipt of notice from Michael Best Strategies LLC before Michael Best Strategies LLC contemplates suspension of services. Michael Best Strategies LLC may suspend its services hereunder during any period for which JCEDC does not pay for a period of time exceeding sixty (60) days past the due date agreed to herein. If Michael Best Strategies LLC notifies JCEDC that it is suspending services for nonpayment, upon payment of the unpaid fees, Michael Best Strategies LLC will resume services and this Agreement shall resume in full force and effect and the applicable term of the Agreement shall be extended by the amount of time that services were suspended.

Continued nonpayment of fees may result in Michael Best Strategies LLC terminating the Agreement. If Michael Best Strategies LLC terminates the agreement for nonpayment of fees during the initial Agreement term, the total fee agreed to above shall be due immediately upon termination. If Michael Best Strategies LLC terminates the Agreement for nonpayment of fees during an automatic extension of the Agreement, all fees invoiced prior to the date of termination shall be due immediately.

All invoices submitted by Michael Best Strategies LLC for payment of expenses shall be in the name of Michael Best Strategies LLC. No extraordinary expenses will be incurred without the prior authorization of JCEDC. You will be obligated to pay all costs and expenses (including, without limitation, reasonable attorneys' fees) incurred by us in obtaining payment of our fees and disbursements.

By default, we will email your invoices to the address provided in this engagement letter. If you prefer to have your invoices sent by another method, please contact your Michael Best Strategies LLC point of contact or email BillingTeam1@michaelbest.com. (cc your Michael Best Strategies LLC contact in your communication).

LIMITATION OF LIABILITY TO CLIENT

Notwithstanding any other provision of this Agreement, in no event shall Michael Best Strategies LLC be liable to JCEDC for JCEDC's lost profits, or special, incidental, punitive or consequential damages (even if Michael Best Strategies LLC has been advised of the possibility of such damages). Furthermore, in no event shall Michael Best Strategies LLC's liability to JCEDC under any circumstances exceed the amount of compensation actually received by Michael Best Strategies LLC from JCEDC under this Agreement as of a date certain. Further, Michael Best Strategies LLC will not be liable for delays or performance failures due to circumstances beyond Michael Best Strategies LLC's control.

INDEMNIFICATION OF CONSULTANT

JCEDC shall indemnify, defend and hold Michael Best Strategies LLC harmless from and against any and all third party claims, liability, suits, losses, damages and judgments, joint or several, and shall pay all costs and expenses (including counsel's fees and expenses) as they are incurred in connection with the investigation of, preparation for, or defense of any pending or threatened claim or any action or proceeding arising therefrom, that Michael Best Strategies LLC incurs as a result of having performed services on behalf of JCEDC.

Thank you for placing your trust in us. We are excited about working on your behalf.

Sincerely,

MICHAEL BEST STRATEGIES LLC

Susan L. Hollender
Managing Director

ACKNOWLEDGED, AGREED AND CONSENTED:

JCEDC

By: 
Benjamin Wehmeier, County Administrator

Dated: 5 July 24

Client Billing Intake Form & Billing Instructions

Please provide the following billing information:

Accounts Payable Contact:
Billing Email Address:
Phone:
Billing Address:
Payment Term: 30 days

Michael Best Strategies offers the following payment options:

1. **ACH/Wire Authorization**

Bank Name: BMO Harris Bank, N.A.
Bank Address: 111 W. Monroe Street, Chicago, IL 60603
Name of Acct: Michael Best Strategies LLC
ABA Routing#: 071000288
Acct #: 003288735
EIN: 46-4875435
SWIFT Code: HATRUS44

Please send all remittance to accounting@michaelbest.com. Please indicate the invoice number(s) being paid.

2. **Check**

Michael Best Strategies LLC
Two Riverwood Place
N19 W24133 Riverwood Drive
Suite 200
Waukesha, WI 53188

3. **Credit Card**

Enter information via this link [Michael Best Payment Portal](#)

PO Notifications

Please send all remittance to BillingTeam1@michaelbest.com. Please indicate invoice number(s) being paid.

If you have any questions about your invoice, please contact us the following email address BillingTeam1@michaelbest.com.

Thank you for placing your trust in us. We are excited about working on your behalf.

Sincerely,
MICHAEL BEST STRATEGIES LLC

Priorities for Jefferson County Municipalities

- 1) Allowing for capital stacks and other flexibilities under TIF
- 2) Bringing additional infrastructure investments from existing utilities into Jefferson County
- 3) Exempting grant awards from expenditure restraint program
- 4) Better understanding by state departments (especially DOT & DNR) about how municipalities promote economic development
- 5) PILOT payments from utilities / ability to create stormwater utility and/or transportation utility
- 6) Allow municipalities to not charge themselves for municipal water.

Full List

Whitewater

1. Pilot payment for utilities
2. Filling that TIF Gap that Emily described/ Finding other solutions to facilitate development besides TIF
3. Losing some of the rules so that EDO can stack programs. Often WHEDA and WCEDA's rules are so harsh that I can barely use the program, so using multiple would be amazing

Watertown

1. Allow for the creation of Workforce Housing TIDs that are not capped at a percentage limit for newly platted residential within the TID.
2. Create incentives for private utilities (such as We Energies) to expand their delivery capacities and build out their infrastructure.
3. Ease limitations on what municipal water utility funds can be spent on for items relating to new developments (e.g., water main extensions).
4. Expand tax credits for small business startups.
5. Exempt grants received from expenditure restraint calculations.
6. Relax state oversight of local commercial building plans that meet local codes and approvals.
7. Allow for easier creation of Business Improvement Districts (BIDs).
8. Allow state surplus money to be used to fill project gaps that cannot be met with TIF funding.
9. Implement checks and balances on mandates from the DNR on stormwater and wastewater relating to new developments.

Fort Atkinson

1. Legislation to allow municipalities to implement Transportation Utilities – the condition of our roads is one of the most consistent complaints that I receive. While I would love to fix all of the roads, I do not have enough money to do so. A transportation utility would allow users of the roads to pay for their share of the use of the roads and would allow non-profits, schools, and other entities that do not pay property taxes to contribute.
2. Protection of municipal borders. I am sure the urban towns bill will come back, and I know the counties did not weigh in on that, but it is important that growth and development in Jefferson County be intentional. If cities are forced to give away utility capacity, they won't be able to support their own intentional development or future development (which is required to grow tax base and NNC).
3. Power. I am sure that this will be a theme among the municipalities that are not in WPPI, but it would be great to have a better relationship with WE Energies on RFIs and development projects.

4. Medicare and Medicaid reimbursement for EMS services. It would be great to be able to get more money back for the services provided to patients on Medicare and Medicaid.
5. Financial support for local public safety. WI provides the least amount of money to support public safety of any state. And now we have MOE, so we have to maintain current levels of service. We cannot continue to pay for the increasing cost of health insurance and wages, vehicles, equipment, and supplies using the revenue sources we currently have (shared revenue and property taxes). Neither revenue sources are increasing at the same rate as expenses.
6. Reimbursement to counties for support for co-responder units in local police departments – consisting of a mental health professional along with a police officer. We have seen success with this program, and I think more communities would benefit with additional resources and support from the state.
7. State support for consistent assessment services at the county level. If the counties provided assessment services (through staff or contracted services), then they would be consistent across the county. Municipalities would save money (and could contribute some of that to the county) and the counties could achieve economies of scale by providing service over a larger area.

Waterloo

1. Additional incentives/resources for utility infrastructure upgrade or expansion for development potential
2. More funding (incentive) opportunities for private/public environmental clean-up
3. Housing funding programs that allow capital stacks with TIF
4. Unrealistic WDOT access standards
5. Program assistance for small communities to acquire greenfield sites for development- to not clean-out general funds
6. More clear communication from state departments to small communities with program changes or future planning

Palmyra

1. Urban and rural areas should not always be treated alike
2. Being surrounded by State Parks has implications and challenges when it comes to development, as discussed in the meeting

Johnson Creek

1. Rail line improvements (potentially federal money sitting around for this?)
2. Housing – TIF flexibilities – assisting developers with making pro formas work

Jefferson County

1. Industrial assessments – needs to be a different way of determining value that is closer to construction costs
2. Infrastructure investments in Jefferson County by our utility companies
3. Funding to support community investment in infrastructure – getting properties shovel ready & investing in wastewater treatment plants to support growth
4. Incentives to support rural housing development

Lake Mills

1. Levy Limit Relief
2. Relaxation of Grant Awards/Principal Forgiveness (stacking of grants, eligibility requirements - income based is difficult and not reflective of how municipalities collect revenue)
3. Ability of municipalities to collect a PILOT from Wastewater Utilities.

Jefferson County Lobbying Priorities

Need	Last Action	Last Action Date	Status
TIF Changes (Allowing for capital stacks and other flexibilities under TIF)		11-Dec	Bill will reach out to schedule meeting with NAIOP et al to discuss TIF asks
TIF Changes (TIF clock start)		11-Dec	Bill will reach out to schedule meeting with NAIOP et al to discuss TIF asks
Bringing additional infrastructure investments from existing utilities into Jefferson County	Met with WEC stakeholders	14-Oct	Complete
	Meet with PSC	11-Dec	Call with PSC on 16-Dec.
Exempting grant awards from expenditure restraint program	Brian met with Gov. Evers's policy lead, Jenni Dye. Gov. will support but this is a legislative play. Will need a bill in the legislature to pass	18-Nov	Determine whether to pursue bill in legislature during upcoming session
Better understanding by state departments (especially DOT & DNR) about how municipalities promote economic development	Brian working to schedule meeting between Jefferson County stakeholders and DOT. Meeting will likely be in January.	12-Nov	Chas received list of Jeff County stakeholders interested in meeting with DOT. Brian getting dates from DOT that will work for meeting.
PILOT payments from utilities / ability to create stormwater utility and/or transportation utility			
Allow municipalities to not charge themselves for municipal water.			

Jefferson County Economic Development Consortium
November 30, 2024

	November 30, 2024		December 31, 2024		
	Forecast	Year to Date Forecast	Revenue/Expense Forecast	2024 Budget	
Revenue					
JCEDC GHDP Service fees	67,500.00	135,000.00	135,000.00	135,000.00	100.00%
GHDP Reimbursable Expenses	2,000.00	2,164.50	2,164.50	1,500.00	144.30%
JCEDCV Service Fees - Homebuyer Program	-	6,439.00	6,539.00	10,000.00	65.39%
JCEDC Service Fees - LLDf	-	-	-	35,000.00	0.00%
V-Cambridge	-	151.50	151.50	148.50	102.02%
V-Johnson Creek	-	5,097.00	5,097.00	5,103.00	99.88%
V-Palmyra	-	2,566.50	2,566.50	2,581.50	99.42%
C-Fort Atkinson	-	18,753.00	18,753.00	18,874.50	99.36%
C-Jefferson	-	11,620.50	11,620.50	11,620.50	100.00%
C-Lake Mills	-	10,039.50	10,039.50	9,678.00	103.74%
C-Waterloo	-	5,469.00	5,469.00	5,446.50	100.41%
C-Watertown	-	22,000.50	22,000.50	22,137.00	99.38%
C-Whitewater	-	6,465.00	6,465.00	6,300.00	102.62%
Jefferson County	-	129,897.00	129,897.00	129,864.00	100.03%
ARPA Funds	-	-	99,379.00	131,379.00	75.64%
WEDC Funds	-	-	-	50,000.00	0.00%
Financial Empowerment	-	20,000.00	20,000.00	-	
TOTAL	69,500.00	\$375,663.00	\$475,142.00	\$574,632.50	82.69%
Expenditures					
Personnel	38,862.52	380,450.87	423,291.21	507,867.00	83%
Professional Services	-	15,802.50	29,302.50	25,000.00	117%
Advertising	-	4,066.28	4,066.28	-	
Web Page Development	833.00	3,448.24	3,574.92	4,000.00	89%
Office Expense	548.33	8,918.62	9,461.49	9,663.00	98%
Instructional Materials - Homebuyer Program	-	125.38	125.38	500.00	25%
Membership	300.00	1,792.83	2,677.83	4,000.00	67%
Professional Development	1,225.00	5,762.43	6,362.43	8,750.00	73%

Expenditures	November 30, 2024	November 30, 2024	December 31, 2024		
	Forecast	Year to Date Forecast	Revenue/Expense Forecast	2024 Budget	
Meeting Expenses	223.01	819.08	869.08	1,000.00	87%
Subscriptions	-	9,770.48	9,840.48	9,000.00	109%
Internet/Phones/Mis	1,562.66	17,003.97	18,566.63	18,502.00	100%
Other Operating	-	-	-	1,000.00	0%
Travel Related	646.00	2,756.64	3,256.64	5,300.00	61%
Other Insurance	338.08	3,248.88	3,586.96	4,057.00	88%
Railroad Consortium	-	14,000.00	14,000.00	14,000.00	100%
Vehicle Repair	-	-	-	-	0%
Fleet Allocation	158.33	1,741.63	1,900.00	1,900.00	100%
Repair & Maintenance - Office	-	-	-	500.00	0%
TOTAL	\$44,696.93	\$469,707.83	530,881.83	615,039.00	86%

2024 SUMMARY

	November 30, 2024	November 30, 2024	December 31, 2024	
	Forecast	Year to Date Forecast	Revenue/Expense Forecast	2024 Budget
Revenues	69,500.00	375,663.00	475,142.00	574,632.50
Expenses	44,696.93	469,707.83	530,881.83	615,039.00
Total Profit/Loss	24,803.07	(94,044.83)	(55,739.83)	(40,406.50)

1/1/2024 JCEDC Operating Reserve Carry Forward Balance

Vested Benefits Balance	(\$36,783.00)
JCEDC Operating Reserve Balance	\$425,914.00

Thrive ED
Balance Sheet Prev Year Comparison
As of December 15, 2024

	Dec 15, 24	Dec 15, 23	\$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings				
1002 · Checking - Badger Bank	76,056.28	107,608.50	-31,552.22	-29.3%
1003 · Savings - FCCU	77,628.65	87,455.39	-9,826.74	-11.2%
1004 · Checking - FCCU	2,535.57	-3,370.38	5,905.95	175.2%
1005 · CD - Ixonia Bank	15,000.00	0.00	15,000.00	100.0%
1006 · CD - Premier Bank	15,000.00	0.00	15,000.00	100.0%
1007 · CD -- First Citizens Bank	15,000.00	0.00	15,000.00	100.0%
1008 · CD - Johnson Bank	15,000.00	0.00	15,000.00	100.0%
1009 · CD - Bank First	15,000.00	0.00	15,000.00	100.0%
1010 · CD - Badger Bank	12,500.00	0.00	12,500.00	100.0%
1011 · CD - FCCU	12,500.00	0.00	12,500.00	100.0%
Total Checking/Savings	256,220.50	191,693.51	64,526.99	33.7%
Total Current Assets	256,220.50	191,693.51	64,526.99	33.7%
TOTAL ASSETS	256,220.50	191,693.51	64,526.99	33.7%
LIABILITIES & EQUITY				
Equity				
3200 · Unrestricted Net Assets	202,900.65	245,871.55	-42,970.90	-17.5%
Net Income	53,319.85	-54,178.04	107,497.89	198.4%
Total Equity	256,220.50	191,693.51	64,526.99	33.7%
TOTAL LIABILITIES & EQUITY	256,220.50	191,693.51	64,526.99	33.7%

10:51 AM
 12/11/24
 Cash Basis

Thrive ED
Profit & Loss Prev Year Comparison
 January 1 through December 10, 2024

	Jan 1 - Dec 10, 24	Jan 1 - Dec 10, 23	\$ Change	% Change
Ordinary Income/Expense				
Income				
4100 · Event revenue	3,630.00	2,070.13	1,559.87	75.4%
4200 · Investor Support 2022-2026 CC	183,500.00	156,350.00	27,150.00	17.4%
4250 · Housing Initiative	37,188.25	50,000.00	-12,811.75	-25.6%
4300 · Grants Received	500.00	22,570.00	-22,070.00	-97.8%
Total Income	224,818.25	230,990.13	-6,171.88	-2.7%
Expense				
5000 · Management fees	135,000.00	135,000.00	0.00	0.0%
5100 · Events	4,072.47	2,360.87	1,711.60	72.5%
5500 · Insurance	450.00	0.00	450.00	100.0%
5600 · Filing fees	79.00	79.00	0.00	0.0%
5700 · Postage	0.00	129.00	-129.00	-100.0%
5800 · Accounting Services	999.50	925.00	74.50	8.1%
6000 · Web Page	2,000.00	0.00	2,000.00	100.0%
6100 · Void Checks/Transactions	0.00	0.00	0.00	0.0%
6300 · Housing Initiatives	0.00	97,301.81	-97,301.81	-100.0%
6400 · Training	0.00	2,878.00	-2,878.00	-100.0%
6500 · Miscellaneous	50.00	0.00	50.00	100.0%
6700 · Meals	318.28	662.50	-344.22	-52.0%
6800 · LLDf	28,729.00	20,872.40	7,856.60	37.6%
6900 · Bank Fees	20.00	0.00	20.00	100.0%
Total Expense	171,718.25	260,208.58	-88,490.33	-34.0%
Net Ordinary Income	53,100.00	-29,218.45	82,318.45	281.7%
Other Income/Expense				
Other Income				
9000 · Interest income	219.85	307.97	-88.12	-28.6%
9010 · Miscellaneous Income	0.00	17.43	-17.43	-100.0%
Total Other Income	219.85	325.40	-105.55	-32.4%
Net Other Income	219.85	325.40	-105.55	-32.4%
Net Income	53,319.85	-28,893.05	82,212.90	284.5%

Glacial Heritage Development Partnership

ThriveED

Capital Campaign - Accounts Receivable

December 13, 2024

2022-2026 CC Investor Pledges Invoiced and unpaid as of 08/19/2024

2024 Pledges		\$25,000.00
Wangard Partners	\$5,000.00	
Bank First	\$5,000.00	
Badger Bank	\$5,000.00	
Watertown Regional Medical Center	\$10,000.00	
TOTAL INVOICED		\$25,000.00

Jefferson County Economic Development Consortium

	2025 Budget		2025 Budget	2025 - to be adjusted
	2024 Forecast	2024 Budget	Approved by County	
Revenue				
JCEDC GHDP Service Fees	135,000.00	135,000.00	175,000.00	175,000.00
JCEDC Services Fees -LLDF	-	35,000.00	100,000.00	100,000.00
GHDP Reimbursable Expenses	2,164.50	1,500.00	1,500.00	1,500.00
Municipality Reimbursable Expenses	-	-	9,000.00	9,000.00
JCEDC Service Fees - Homebuyer	6,539.00	10,000.00	7,500.00	7,500.00
V-Cambridge	151.50	148.50	151.50	153.00
V-Johnson Creek	5,097.00	5,103.00	5,097.00	5,130.00
V-Palmyra	2,566.50	2,581.50	2,566.50	2,569.50
C-Fort Atkinson	18,753.00	18,874.50	18,753.00	18,699.00
C-Jefferson	11,620.50	11,620.50	11,620.50	11,659.50
C-Lake Mills	10,039.50	9,678.00	10,039.50	10,204.50
C-Waterloo	5,469.00	5,446.50	5,469.00	5,466.00
C-Watertown	22,000.50	22,137.00	22,000.50	21,924.00
C-Whitewater	6,465.00	6,300.00	6,465.00	6,664.50
Jefferson County	129,897.00	129,864.00	129,897.00	130,282.50
ARPA Funds	99,379.00	131,379.00	-	-
Federal Grant	20,000.00	-	-	-
WEDC Grant	-	50,000.00	-	-
	\$ 475,142.00	\$ 574,632.50	\$ 505,059.50	\$ 505,752.50

Expenditures				
Personnel	423,291.21	507,867.00	449,783.22	463,368.20
Professional Services	29,302.50	25,000.00	45,000.00	45,000.00
Web Page Development	3,574.92	4,000.00	3,000.00	3,000.00
Advertising	4,066.28	-	3,000.00	3,000.00
Office Expense		9,663.00		
Equipment Rent & Lease	2,468.72		2,556.00	2,556.00
Maintain Machinery & Equipment	1,327.43		2,000.00	2,000.00
Office Supplies	1,186.69		1,000.00	1,000.00
Printing & Duplicating	178.50		400.00	400.00
Small Items of Equipment	139.32		150.00	150.00
Office Equipment	-		500.00	500.00
Computer Equipment & Software	4,059.14		2,500.00	2,500.00
Postage & Box Rent	101.69		150.00	150.00
Membership	2,677.83	4,000.00	4,000.00	4,000.00
Professional Development		8,750.00		
Registration	2,550.47		4,000.00	4,000.00
Lodging	2,376.00		2,500.00	2,500.00
Commercial Travel	1,435.96		2,000.00	2,000.00
Meeting Expense				
Food	869.08	1,000.00	1,000.00	1,000.00
Training Materials - Home Buyer	125.38	500.00	500.00	500.00
Subscriptions	9,840.48	9,000.00	9,000.00	9,000.00
Internet/Phone/MIS		18,502.00		
MIS PC Group Allocation	13,311.00		14,836.00	14,825.00
MIS Systems Group Alloc (ISIS)	3,699.96		3,438.00	3,417.00
IP Telephone Allocation	240.96		385.00	383.00
Telephone & Fax	1,314.71		1,750.00	1,750.00
Other Operating	-	1,000.00	1,000.00	1,000.00
Travel Related		5,300.00		
Mileage	1,303.07		2,000.00	2,000.00
Meals	403.18		1,000.00	1,000.00
Other Travel & Tolls	795.63		300.00	300.00
Gas/Diesel - County Car	754.76		2,000.00	2,000.00
Other Insurance	3,586.96	4,057.31	3,740.06	3,740.06
Railroad Consortium	14,000.00	14,000.00	14,000.00	14,000.00
Fleet Allocation	1,900.00	1,900.00	1,900.00	1,900.00
Repair & Maintenance - Office	-	500.00	500.00	500.00
Repair & Maintenance - Vehicle	-	-	-	-
Operating Reserve*	(10,113.15)	(40,406.81)	(74,828.78)	(87,686.76)
	\$ 520,768.68	\$ 574,632.50	\$ 505,059.50	\$ 505,752.50

*Operating Reserve Balance
\$425,913.54

(45,626.68)

Notes -

Municipality Investments were updated to DOA Populations Numbers

Payroll numbers were updated to current numbers in Munis

**Glacial Heritage Development Partnership
Proposed 2025 Budget**

Income	December 10, 2024 Year to Date	December 31, 2024 Total Forecast	2024 Budget	2025 Budget	Notes
2022-2026 Investor Pledge Support	173,500.00	203,500.00	173,600.00	179,600.00	
2022-2026 Anticipated Pledges - No Commitment	10,000.00	10,000.00	10,000.00	10,000.00	Watertown Hospital
Event Revenue	3,630.00	3,630.00	5,000.00	5,000.00	
WEDC Grant - Housing Initiative	37,188.25	37,188.25	-	-	
Interest Income	219.85	275.00	300.00	4,200.00	\$100,000 in CD's
Live Local Development Fund	-	-	50,000.00	135,000.00	1% Loan Origination Fee, LLDf Interest
Grants Received	500.00	500.00	-	-	
TOTAL INCOME	\$ 225,038.10	\$ 255,093.25	\$ 238,900.00	333,800.00	
Expenses					
Contract for ED Services	135,000.00	135,000.00	135,000.00	175,000.00	
Live Local Development Fund	28,729.00	30,500.00	29,127.00	35,000.00	
Events	4,072.74	4,200.00	4,500.00	5,000.00	
Printing	-	-	300.00	300.00	
Professional Fees	-	-	-	29,250.00	Legal fees (real estate options, bylaw updates), Tracy Cross
Insurance	450.00	450.00	500.00	2,500.00	
Filing Fees	79.00	79.00	79.00	79.00	
Postage	-	-	136.00	75.00	
Accounting Services	999.50	1,500.00	1,000.00	6,000.00	Preparing for change to accrual & set-up of accounting to support LLDf; includes audit for 2025
Membership	-	-	-	-	
Training	-	-	-	-	
Meals	318.28	425.00	1,000.00	1,000.00	
Website Hosting	2,000.00	2,000.00	1,718.00	2,000.00	
Collateral/Marketing design	-	-	300.00	300.00	
Miscellaneous	50.00	50.00	-	-	award submittal
Bank Fees	20.00	20.00	-	20.00	check printing
Pledge Loss (3% of 2022 pledges)	-	-	5,208.00	5,688.00	3% of Investor Pledges
Real Estate	-	-	-	100,000.00	Site identification, real estate options & predevelopment work
TOTAL EXPENSES	\$ 171,718.52	\$ 174,224.00	\$ 178,868.00	\$ 362,212.00	
Net Income	\$ 53,319.58	\$ 80,869.25	\$ 60,032.00	\$ (28,412.00)	



TRACY CROSS & ASSOCIATES, INC.
REAL ESTATE MARKET ANALYSIS

PROFESSIONAL SERVICE AGREEMENT

Name:	Ms. Deborah Reinbold Jefferson County	Agreement No:	8922-GC
Address:	864 Collins Rd., Suite 111 Jefferson, WI 53549	Date:	December 11, 2024
		Location:	Jefferson County, WI
		Product Type(s):	All Residential

I. Description of Services:

Cross will provide selected research and consulting services to evaluate the current state of the new construction housing market throughout Jefferson County, Wisconsin, focusing on both the *for rent* and *for sale* sectors of the market, and including both market rate and workforce housing initiatives. Specifically, Cross will provide Client a thorough understanding of new construction housing demand over the next 5-10 years (segmented by product type), then cast against both existing inventory/supply (among existing new construction developments) and projects formally in the planning pipeline. In doing so, Cross will also provide a general rent/price analysis of those existing/proposed projects (and their current/expected position in the market), and where any voids/holes exist relative to the qualitative distribution of demand going forward. Areas of focus within the county will include the municipalities of Cambridge, Fort Atkinson, Jefferson, Johnson Creek, Lake Mills, Palmyra, Waterloo, Watertown and Whitewater.

Services shall encompass an on-site investigation of Jefferson County and each identified municipality; a review of relevant economic, demographic and demand variables, and an examination of new construction residential developments, both existing/under construction and planned. It will conclude with the submission of an executive summary report, which will allow Client to make "informed" planning decisions regarding the direction of new housing in the county over the next 5-10 years and where attention should be focused.

II. Timing:

Services shall be completed within six (6) weeks of contract execution and receipt of contract deposit as outlined in Section III below.

III. Fee Structure:

Client agrees to pay Cross as compensation for services rendered a fee of \$11,750 with a contract deposit of \$7,500 due at contract execution and the remaining \$4,250 to be paid upon submission of the report and receipt of invoice.

Note: the fee structure outlined above has been discounted from Cross' normal billing rate for similar studies considering previous work performed in the county and our relationship with Client.

Reimbursable expenses, including but not limited to mileage/tolls, and the cost of secondary data available only through purchase, will be billed separately at cost.

Timing and fee schedule noted are valid for 60 days from date of proposal.

IV. Authority to Act/Payment of Fees and Expenses:

The undersigned, hereby acknowledges that he/she has authority to enter into this agreement with Cross on behalf of the Client, and further promises and agrees to pay all invoices for fees, costs and expenses when due, including but not limited to all collection costs, attorney's fees and other related costs incurred in enforcing any of Cross' rights hereunder. **All payments are due within fifteen (15) days of receipt of invoice.**

V. Entire Agreement/Choice of Forum:

This agreement constitutes the entire agreement between the parties without regard to any statements or representations made prior to or subsequent to its execution. No changes, modifications or revisions can or will affect or alter the agreement unless the changes, modifications or revisions are in writing and acknowledged by both parties. The agreement shall be governed by the laws of the State of Illinois, and any legal proceedings relating to the agreement shall take place in the Circuit Court of Cook County, Municipal or Law Division, Rolling Meadows, Illinois.

VI. Approval and Acceptance:

If this agreement is acceptable to you, please sign and return one executed contract along with the \$7,500 contract deposit as outlined in Paragraph III.

The undersigned hereby agrees with the provisions set forth above and authorizes Tracy Cross & Associates, Inc. to proceed.

TRACY CROSS & ASSOCIATES, INC.

CLIENT: JEFFERSON COUNTY

By: 
Erik A. Doersching
Its: President & CEO

By: _____
Deborah Reinbold

Date: December 11, 2024

Date: _____

Pipeline Activity Between 8/22/2024 - 12/15/2024

Active Date	Project Name	Project Stage	Locations	Opportunity Type	Pipeline Description (Public)
2/7/2022	All Saints	ACTIVE - LOW	Jefferson (J)	Residential	Redevelopment project - historic tax credits
3/18/2024	Bio	ACTIVE - 50/50	Aztalan (J)	Business Expansion	Assist company with funding sources
1/14/2020	Corner	ACTIVE - 50/50	Jefferson (J)	Mixed-Use Development	Assist developer with mixed-use development, LLDF Applicant
7/3/2024	Cracker	ACTIVE - HIGH	Lake Mills (J)	Attraction	Acquisition of existing business
10/1/2024	Electric	ACTIVE - LOW	Waterloo (J)	Attraction	Developer tour - looking for sites with high utility capacity
3/28/2024	Ettore	PRELIMINARY - Too new to	Jefferson County	Attraction	RFP - Build 100k sf manufacturing facility
10/28/2024	Field	WIN - Jefferson County	Jefferson (J)	Existing Business	Underwriting for loan application
3/15/2024	Intrepid	ACTIVE - HIGH	Fort Atkinson (J)	Residential	Assist developer with residential development, LLDF Applicant
6/15/2023	Jam	ACTIVE - LOW	Watertown (J)	Residential	Housing developer assistance
1/25/2024	Laker	ACTIVE - 50/50	Lake Mills (J)	Residential	Assist developer with residential development, LLDF Applicant
9/16/2024	Legacy	ACTIVE - LOW	Watertown (J)	Existing Business	Assist with potential sale
7/2/2024	Pepperoni	ACTIVE - HIGH	Jefferson (J)	Mixed-Use Development	Redevelopment project on former industrial site
8/29/2024	Project	PRELIMINARY - Too new to	Johnson Creek (J)	Attraction	RFP for agricultural chemical company - On hold
9/19/2024	Project Blue Forest	ACTIVE - LOW	Whitewater (W)	Attraction	RFP response for greenhouse project
9/10/2024	Project Circle	ACTIVE - LOW	Jefferson (J)	Attraction	RFP Response for biomanufacturing facility
1/8/2024	Project Goldeneye	WIN - Jefferson County	Jefferson (J)	Attraction	RFP - International FaB Manufacturer; Site visit in May
9/3/2024	Project Kendal	ACTIVE - LOW	Fort Atkinson (J)	Attraction	RFP Response for FAB manufacturer
9/27/2024	Project Powder	PRELIMINARY - Too new to know!	Fort Atkinson (J), Jefferson (J)	Attraction	RFP Response for FAB manufacturer
9/23/2024	Reno	WIN - Jefferson County	Jefferson (J)	Existing Business	Underwriting for loan application
9/5/2024	Reserve	ACTIVE - 50/50	Lake Mills (J)	Residential	Possible LLDF applicant
8/24/2023	Riverside	ACTIVE - HIGH	Watertown (J)	Residential	Multifamily housing development. LLDF Applicant
2/20/2023	Senior	ACTIVE - 50/50	Fort Atkinson (J)	Residential	Assistance with identifying a development partner
1/19/2022	Sentry	ACTIVE - LOW	Lake Mills (J)	Residential	Redevelopment housing project
7/17/2024	Teepee	ACTIVE - 50/50	Whitewater (W)	Residential	Multifamily housing development. LLDF Applicant
5/15/2024	Timely	WIN - Unassisted	Jefferson (J)	Existing Business	Assistance with site selection and zoning
6/27/2024	Vesuvius	PRELIMINARY - Too new to	Jefferson County	Mixed-Use Development	Developer's Tour - interested in reconnecting about specific sites

JEFFERSON COUNTY HOMEBUYER/REHAB REPORT

January 29, 2024 – December 15, 2024

Seminars Held to Date – 10

Attendance – 84

Home Purchased as of 12/16/2024 - 8

	City Purchased in	Purchased by	Purchase Price	Grants Received	Pre-Purchase Rehab Loan to get property to code
	Fort Atkinson	Single Male	\$280,000	\$10,000 Down Payment Plus	
	Fort Atkinson	Single Male	\$132,000	\$10,000 Down Payment Plus \$10,000 HOME Consortium	\$6,345.00
	Watertown	Single Female w/child	\$175,000	\$10,000 HOME Consortium	\$4,000.00
	Watertown	Single Female	\$173,000	\$10,000 HOME Consortium	
	Beloit	Single Female	\$122,500	\$10,000 Down Payment Plus	
	Hartford	Single Female	\$245,000	\$10,000 HOME Consortium	
	Janesville	Single Female	169,000	\$10,000 Down Payment Plus	
	Jefferson	Single Male w/child	210,000	\$10,000 Down Payment Plus \$10,000 Home Consortium	\$5,000.00

City of Watertown – Housing Rehab Grant Program - This program is intended to provide access to capital to assist property owners, both owner-occupied and landlords, with the necessary maintenance of their properties to preserve and increase housing stock and property values. The program is administered by the Watertown Redevelopment Authority (RDA) - 17 inquiries/request for funds

Denied – 2

Not moving forward due to lack of funds – 5

Approved – Rental – 2 (1 closed)

Approved – Homeowner – Layering with HOME Consortium – 3 (1 closed)

Approved – Homeowner – Over 80% Income – 2 (1 closed)

Applications in process – waiting on paperwork or their decision to move forward – 2

Applications – working with families - 1

HOME Consortium Post Purchase Rehab Projects for Jefferson County

Submitted through JCEDC – 3 - \$59,343.00

Directly applied through HOME Consortium – 3 – \$56,628.50